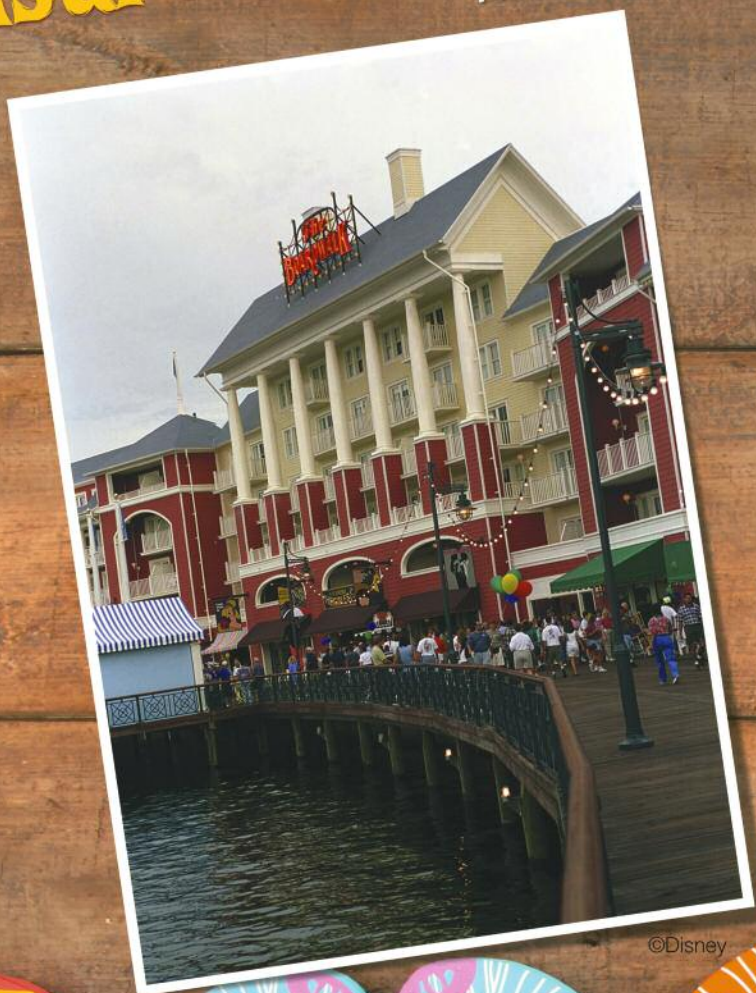


Leisure and Learning

The Perfect Pair



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Summer Vacation Cluster

July 28-30, 2011
Disney's BoardWalk Inn • Lake Buena Vista, FL

NEW
LOCATION!

FIGPA



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Enjoy the famous hospitality of *Walt Disney World® Resort* while we serve up some CPE!

Uncover the secret that some CPAs have already discovered. You can earn CPE, gain valuable knowledge for your practice, and enjoy the surroundings of *Walt Disney World® Resort* all at the same time.

This year's conference is in a new location – Disney's Boardwalk Inn – a resort that captures the charm, whimsy and elegance of 1940s Atlantic City. Sitting along a boardwalk packed with amusements, the resort offers dynamic views of activity below and of the glittering waters of Crescent Lake.

CPE Credit

We have filled this event with 9 four-hour sessions, providing you the opportunity to earn up to 20 hours of CPE. Credit received depends on the amount and type of session(s) attended. Please indicate choices on the registration form. All credit is subject to approval by the Florida Department of Business and Professional Regulation. Accounting & Auditing (AA), Technical Business (TB), and Ethics (ET).

Follow the FICPA on [twitter](#) @ficpa and use #SVC11 to tweet about this conference.

Conference at-a-glance

Thursday

8:15-8:45 a.m.

8:45 a.m.-12:15 p.m.

8:45 a.m.-12:15 p.m.

1:00-1:30 p.m.

1:30-5:00 p.m.

1:30-5:00 p.m.

Friday

8:15-8:45 a.m.

8:45 a.m.-12:15 p.m.

8:45 a.m.-12:15 p.m.

1:00-1:30 p.m.

1:30-5:00 p.m.

1:30-5:00 p.m.

Saturday

9:00 a.m.-12:30 p.m.

July 28

Session I & II Registration

Session I

What's Up with Fraud?

Session II

The Wealth Empowerment Formula™: Actions YOU Can Take to Enhance Your Personal Wealth Management Strategy

Session III & IV Registration

Session III

Accounting & Auditing Update for Professionals 2011

Session IV

Detecting Exploitation, Common Misunderstandings of Fiduciary Duties and Remedies for Breach

July 29

Session V & VI Registration

Session V

Compilation and Review Update: Top 10 Issues Plus Others

Session VI

Federal Tax Update – Including Recent Tax Developments Pertaining to Individuals, Administrative Practice and IRC Section 263A

Session VII & VIII Registration

Session VII

Fiduciary Accounting

Session VIII

Technology Update

July 30

Session IX

Ethics: Protecting the Integrity of Florida CPAs (4980)

Thursday July 28

8:15-8:45 a.m.

Session I & II Registration

8:45 a.m.-12:15 p.m. Session I (SVC01)

What's Up With Fraud? (4 AA)

Lynn H. Clements, DBA, CPA, CMA, CFM, CFE, Cr.FA

Professor of Accounting / Florida Southern College / Lakeland

Discover the trends in fraud during the Great Recession, and use your forensic skills to investigate and detect fraud in a case study environment.

8:45 a.m.-12:15 p.m. Session II (SVC02)

The Wealth Empowerment Formula™: Actions YOU Can Take to Enhance Your Personal Wealth Management Strategy (4 TB)

Robert B. Wolfe, CFP®

Managing Partner / United Capital Financial Advisers, LLC / Ft. Lauderdale

Amid the continued economic challenges and uncertainty gripping the world, many are challenged to sort through the economic chaos and confusion to determine the specific actions they should take to improve upon their personal wealth management strategy. This session provides a blueprint participants can use to review their personal situations and determine the specific actions that can and should be executed to improve upon their situations.

1:00-1:30 p.m.

Session III & IV Registration

1:30-5:00 p.m. Session III (SVC03)

Accounting & Auditing Update for Professionals 2011 (4 AA)

Cecil Patterson, Jr, CPA, MBA

Patterson CPA Group, Inc. / Ponte Vedra Beach
Attendees will learn about the 2011 accounting and auditing professional standards and review selected standards from 2010. Some specific areas to be discussed include: new FASB pronouncements, SASs, SSARS, IASB, IAASB, quality control standards, updates to Florida Statutes and Administrative Code, ethics interpretation 101-3, and other timely matters.

1:30-5:00 p.m. Session IV (SVC04)

Detecting Exploitation, Common Misunderstandings of Fiduciary Duties and Remedies for Breach (4 TB)

Gerald L. Hemness, Esq.

Attorney / Emma Hemness, PA / Brandon

This course offers an overview of exploitation, types of exploiters, common warning signs, review of fiduciary duties under a Power of Attorney or as a Successor Trustee, and remedies for breach, including immediate and long-term intervention and how civil and criminal statutes apply.

Friday July 29

8:15-8:45 a.m.

Session V & VI Registration

8:45 a.m.-12:15 p.m. Session V (SVC05)

Compilation and Review Update: Top 10 Issues Plus Others (4 AA)

Cecil Patterson, Jr, CPA, MBA

Patterson CPA Group, Inc. / Ponte Vedra Beach
Learn about the 2010 and 2011 compilation and review professional standards, which represent the most significant changes to compilation and review services in more than 30 years. Compilation and review documentation, engagement letter requirements, and representation letters. Specific areas to be covered include: SSARS 19, Review Evidence, IASB as it applies to compilation and review engagements, new quality control standards, mobility issues, and the latest peer review status, and changes to the Florida Statutes and Administrative Code.



8:45 a.m.-12:15 p.m. Session VI (SVC06)

Federal Tax Update – Including Recent Income Tax Developments Pertaining to Individuals, Administrative Practice, and IRC Section 263A (4 TB)

Russell F. Dunn

Tenured Professor / Broward College President & Sole Shareholder/ Dunn & Co., CPAs, P.A. / Hollywood and

Lois Dunn

§ 263A Technical Advisor / U.S. Treasury Department: Internal Revenue Service Plantation

This course presents recent federal income tax developments including legislation, regulations, cases, rulings and other administrative pronouncements in certain practice areas. Specific topics include IRS practice and procedure, sale of personal residence (short sales and foreclosures), standard deduction updates, casualty losses (corrosive drywall), and other issues. Also covered are uniform capitalization rules under IRC section 263A and related Accounting Method Changes.

1:00-1:30 p.m.

Session VII & VIII Registration

1:30-5:00 p.m. Session VII (SVC07)

Fiduciary Accounting (4 AA)

F. Gordon Spoor, CPA/PFS

Managing Partner / Spoor & Associates St. Petersburg

This session discusses the Florida Income and Principal Act (F.S. 738) and how it is applied in the preparation of fiduciary accountings. Tax impacts also are emphasized. The session is designed to allow practitioners to accurately provide fiduciary accountings for their trust and estate clients.

1:30-5:00 p.m. Session VIII (SVC08)

Technology Update (4 TB)

A. David Bergstein, CPA, CITP

Director, Strategic Relationships

CCH, a Wolters Kluwer business / Margate

This session will be divided into three areas:

Digital Best Practices – as they relate from the office setup to delivery to your clients. The real meaning of going paperless and how the cloud has dramatically altered the course of an office set up.

Gadgets Gizmos and other Accessories - discuss what toys (tools) are being used in business and what is cool. Smartphones, Smartpens, Tablets, etc.

Social Media - cover some of the tools we can use to grow and market our business including LinkedIn, Facebook and Foursquare.

Saturday July 30

8:30-9:00 a.m.

Session IX Registration

9:00 a.m.-12:30 p.m.

Ethics: Protecting the Integrity of Florida CPAs (4980) (4 ET)

Cecil Patterson, Jr, CPA, MBA

Patterson CPA Group, Inc. / Ponte Vedra Beach

This year's course is updated with a focus on real-life ethical issues and addresses internal and external issues CPAs face, such as professional standards, ethical conduct, client communication and independence. Specific areas discussed include: ethical case studies, relationship of Florida laws and rules to national standards, Chapter 455, 473 FS and 61H1 Florida Administrative Code, Florida's independence rules, AICPA interpretation 101-3 on independence, and AICPA's confidentiality and record retention requirements.

The course complies with the ethics requirements for Florida CPAs as set forth by the Florida Board of Accountancy.



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Conference Site

Disney's BoardWalk Inn

2101 N. Epcot Resorts Blvd.
Lake Buena Vista, FL 32830
(407) 934-3372

Accommodations

FICPA Room Rate: \$169 Single/Double
Hotel Cutoff Deadline: Friday, July 1, 2011

(Reservations received after the hotel cutoff date will be subject to availability and current room rate.)

Please call the hotel directly at (407) 939-5100 to reserve your room and be sure to mention the FICPA Summer Vacation Cluster to receive the special group rate.

There may be a fee for some guest services. Not all features and services are available in all rooms. Contact hotel for details.

CPE Policies

You May Need to Know


CPE policies may be found on our website at www.ficpa.org/policies, or on the registration confirmation sent upon completion of registration.

Conference Materials

Conference reference materials are distributed to registrants electronically in advance of the program. There will not be printed material available on site. This fully searchable PDF includes speaker presentations and is intended for electronic use only.

Group Discount Available

Register 5 or more people from the same organization and receive special group discounts! Restrictions may apply. For more information, visit www.ficpa.org/policies.



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Florida Institute of Certified Public Accountants
P.O. Box 5437 • Tallahassee, Florida 32314

Summer Vacation Cluster

July 28-30, 2011
Disney BoardWalk Inn
Lake Buena Vista, FL

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