



C P E C O N F E R E N C E

PLANNER

Pull out this planner to use as a registration guide.
Official registration form found on pages 40-42.

JUNE 10-13, 2015

WEDNESDAY 6.10

	Time	Topic	Credit	Speaker
	6:30-8 a.m.	Registration and Continental Breakfast		
G1	7-7:50 a.m.	Advanced QuickBooks	1 TB	Mario Nowogrodzki
	8-8:15 a.m.	Introduction and Opening Remarks – for each Breakout		
BO1	8:15-9:05 a.m.	State of the States – Trends in State Tax Policy	1 TB	Harley Duncan
BO2	8:15-9:05 a.m.	DOL Update	1 TB	Marcus Aron
BO3	8:15-9:05 a.m.	Behind the Headlines: Looking Forward at the Post-Recession Economy	1 TB	Bill Pittenger
	9:05-9:10 a.m.	Change Rooms		
BO4	9:10-10 a.m.	Multi-State Tax Update – Part 1	1 TB	Jordon Goodman and Marilyn Wethekam
BO5	9:10-10 a.m.	IRS Update for Employment Benefit Plans	1 TB	IRS Person
BO6	9:10-10 a.m.	FASB Update-Private Company	1 AA	Michael Cheng
	10-10:15 a.m.	Break-Change Rooms		
BO7	10:15 a.m.-11:05 a.m.	Multi State Tax Update – Part 2	1 TB	Jordon Goodman and Marilyn Wethekam
BO8	10:15 a.m.-11:05 a.m.	Employee Benefit Plan Update-What is Going on, What is New, What is Hot with Employee Benefit Plans	1 AA	Marilee P. Lau
BO9	10:15 a.m.-11:05 a.m.	Customs and Foreign Trade – Understanding the Risks and Refunds Associated with International Trade	1 TB	Pete Mento
	11:05-11:10 a.m.	Change Rooms		
BO10	11:10-12 p.m.	Florida Commercial Rental Transactions	1 TB	Robert Clarke and Steve Hogan
BO11	11:10-12 p.m.	SOC 1 Report – Common Audit Deficiencies	1 AA	Erin M. Koski
BO12	11:10-12 p.m.	How to Set up Online Audit Workpaper Technique	1 AA	Mark Brechbil, Keith A. Jowers and Brett Nesbit
	12-1 p.m.	Lunch		
BO13	1-1:50 p.m.	State Taxation of US Inbound and Outbound Transactions	1 TB	Jonathan M. Cesaretti and Jeffery Rubinger
BO14	1-1:50 p.m.	TPA Support/Form 5500 Pitfalls/Compliance Testing Attributes	1 TB	Krystle Kaufman
BO15	1-1:50 p.m.	GASB Update-An Overview of What is New and What is Coming	1 AA	Lisa Parker
	1:50-2:10 p.m.	Break-Change Rooms		
BO16	2:10-3 p.m.	State Income Taxation of Partnerships and Pass Through Entities	1 TB	Mark Hajduch and Dana Lance
BO17	2:10-3 p.m.	Audit EBP Hot Topics-Content/Questions – Part 1	1 AA	Wendy Y. Terry
BO18	2:10-3 p.m.	Is it Yours or Is It Theirs? Keep Taxes Out of Your Retirement Income	1 TB	Garry Marriage
	3-3:10 p.m.	Change Rooms		
BO19	3:10-4 p.m.	Florida Property Tax Update	1 TB	Robert S. Goldman and William D. Shepard
BO20	3:10-4 p.m.	Audit EBP Hot Topics-Content/Questions Part 2	1 AA	Wendy Y. Terry
BO21	3:10-4 p.m.	Oops! Sponsor or Auditor: Top Issues to Be Aware Of	1 TB	Robert A. Lavenberg
	4-4:10 p.m.	Change Rooms		
G2	4:10-5 p.m.	Social and Economic Trends-Changing the Future of Accounting	1 TB	Mark J. Koziel



THURSDAY 6.11

	Time	Topic	Credit	Speaker
	6:30-8 a.m.	Registration and Continental Breakfast		
G3	7-7:50 a.m.	Five Ways to Settle for Less With the IRS	1 TB	Darrin T. Mish
	8-8:15 a.m.	Opening Remarks and Awards		Committee Chair and FICPA Chair
G4	8:15-9:05 a.m.	Keynote Address – Professional Issues Update	1 TB	Barry C. Melancon
	9:05-9:30 a.m.	Break – Vendor Networking – Change Rooms		
BO22	9:30-10:20 a.m.	SSARS Update	1 AA	Chuck Landes
BO23	9:30-10:20 a.m.	Alternatives to Bank Financing: Analyzing the Options	1 TB	Lunelle Siegel
BO24	9:30-10:20 a.m.	Overview of Important Tax Issues Related to Foreign Companies Doing Business in the U.S.	1 TB	Hal J. Webb
BO25	9:30-10:20 a.m.	Navigating the Florida Department of Revenue	1 TB	Patrick Loebig and Deborah Maddren
	10:20-10:30 a.m.	Change Rooms		
BO26	10:30-11:20 a.m.	SAS – Professional Standards Update	1 AA	Chuck Landes
BO27	10:30-11:20 a.m.	Tax and Succession Planning for Agricultural Businesses	1 TB	Michael D. Minton
BO28	10:30-11:20 a.m.	HR – How to Handle Difficult Conversations	1 B	Lisa Huettemann
BO29	10:30-11:20 a.m.	Federal Marketplace Fairness Act Viewed in the Light of Public Law 86-272	1 TB	Gary Peric and James H. Sutton, Jr.
	11:45 a.m.-12:35 p.m.	Lunch		
BO30	12:45-1:35 p.m.	FRF / IFRS for SMEs / Private Company Accounting	1 AA	Mark E. Brechbill
BO31	12:45-1:35 p.m.	Pricing the Business for Sale	1 TB	C. Brett Cooper
BO32	12:45-1:35 p.m.	How to Handle Clients with Foreign Bank Accounts	1 TB	Jennifer Correa-Riera
BO33	12:45-1:35 p.m.	Florida Hot Topics	1 TB	Kevin J. Herzberg and Rex D. Ware
	1:35-1:45 p.m.	Change Rooms		
BO34	1:45-2:35 p.m.	Understanding the New Revenue Recognition Rules – Part 1	1 AA	Ed Grossman
BO35	1:45-2:35 p.m.	Nonprofit Update	1 AA	David Moja
BO36	1:45-2:35 p.m.	Future of the Small to Medium Sized Accounting Firm	1 TB	Carl Peterson
BO37	1:45-2:35 p.m.	Florida Income Tax Considerations	1 TB	James M. Ervin and Vincent P. Oatis, III
	2:35-3 p.m.	Break-Vendor Networking-Change Rooms		
BO38	3-3:50 p.m.	Understanding the New Revenue Recognition Rules – Part 2	1 AA	Ed Grossman
BO39	3-3:50 p.m.	How to Use Estate Planning Techniques to Protect Assets	1 TB	Denis A. Kleinfeld
BO40	3-3:50 p.m.	How to Deal with IRS Problems	1 TB	Darrin Mish
BO41	3-3:50 p.m.	A View from the Trenches: Maximizing Florida Sales Tax Audit Procedures	1 TB	Mark E. Holcomb and Karen A. Lake
	3:50-4 p.m.	Change Rooms		
G5	4-4:50 p.m.	Catching Up on Tax and Estate Planning Developments	1 TB	Charles Rubin
	4:30-6:30 p.m.	Vendor Reception		
G6	4:50-5:40 p.m.	Taxes-Scams, Shams and Fraud	1 TB	Benjamin Jablow





FRIDAY 6.12

	Time	Topic	Credit	Speaker
	6:30-8 a.m.	Registration and Continental Breakfast		
G7	7-7:50 a.m.	Accounting for Leases	1 AA	Ed Grossman and Cecil Patterson, Jr.
	8-8:15 a.m.	Opening Remarks and Awards		Committee Chair and FICPA Chair
G8	8:15-9:05 a.m.	Keynote Address: How Florida's Economy Recovered: Fraud, Financial Literacy, Transparency in Government and How CPAs Can Help	1 TB	CFO Jeff Atwater
	9:05-9:30 a.m.	Break – Vendor Networking – Change Rooms		
BO42	9:30-10:20 a.m.	Revenue Recognition – Special Issues – Part 1	1 AA	Ed Grossman
BO43	9:30-10:20 a.m.	Tablets-Best Uses for CPAs	1 TB	Mark W. Ryburn
BO44	9:30-10:20 a.m.	2015 Legislative Update	1 TB	French Brown and Adam Raschke
BO45	9:30-10:20 a.m.	Sales & Use Tax Record Keeping	1 TB	Glenn A. Bedonie and Joseph C. Moffa
	10:20-10:30 a.m.	Change Rooms		
BO46	10:30-11:20 a.m.	Revenue Recognition – Special Issues – Part 2	1 AA	Ed Grossman
BO47	10:30-11:20 a.m.	Electronic Payment Security	1 TB	Suzanne Miller
BO48	10:30-11:20 a.m.	Same Sex Marriage	1 TB	Bradley R. Gould
BO49	10:30-11:20 a.m.	Foreign Corrupt Practices Act (FCPA) Investigations and Anti-Corruption Best Practices – Part 1	1 TB	Ron J. Schwartz
	11:45 a.m.-12:35 p.m.	Lunch		
BO50	12:45-1:35 p.m.	Accounting for LLCs – Part 1	1 AA	Mark E. Brechbill
BO51	12:45-1:35 p.m.	CFO Update – Part 1	1 TB	Mark Bachmann and A. Michael McCracken
BO52	12:45-1:35 p.m.	Principles of Estate Management	1 TB	Brian J. Hershorn
BO53	12:45-1:35 p.m.	Foreign Corrupt Practices Act (FCPA) Investigations and Anti-Corruption Best Practices – Part 2	1 TB	Ron J. Schwartz
	1:35-1:45 p.m.	Change Rooms		
BO54	1:45-2:35 p.m.	Accounting for LLCs – Part 2	1 AA	Mark E. Brechbill
BO55	1:45-2:35 p.m.	CFO Update – Part 2	1 TB	Mark Bachmann and A. Michael McCracken
BO56	1:45-2:35 p.m.	Leadership and Vision: Designing the Firm of the Future While Retaining Your Desired Culture – Part 1		Jimmy J. Williams
BO57	1:45-2:35 p.m.	50 Apps in 50 Minutes	1 TB	A. David Bergstein
	2:35-3 p.m.	Break – Change Rooms		
BO58	3-3:50 p.m.	Proving the Value-Due Dilligence and Fraud in M&A	1 AA	C. Brett Cooper
BO59	3-3:50 p.m.	Horror Stories of Peer Review	1 AA	Paul N. Brown
BO60	3-3:50 p.m.	Recruiting & Retention	1 TB	Anne Marie Hicks (Moderator), Russ Coughenour, Carlota Centeio-Pinto and Brett Nesbit
BO61	3-3:50 p.m.	Leadership and Vision: Designing the Firm of the Future While Retaining Your Desired Culture – Part 2	1 TB	Jimmy J. Williams
	3:50-4 p.m.	Change Rooms		
G9	4-5:40 p.m.	Scams, Shams & Fraud	2 AA	Bruce A. Nunnally
	7:30-9:30 p.m.	Chairman's Gala		



SATURDAY 6.13

	Time	Topic	Credit	Speaker
	7-8:15 a.m.	Registration and Continental Breakfast		
G10	7:15-8:05 a.m.	Strategic Planning – Think Ahead or Get Left Behind	1 TB	Raymond Monteleone
	8:05-8:15 a.m.	Change Rooms		
BO62	8:15-12 p.m.	Ethics – Protecting the Integrity of Florida CPAs (4980)	4 ET	Gary A. Fracassi
BO63	8:15-9:05 a.m.	Fractional CFO – Outsourcing the CFO	1 TB	Richard Trueblood
BO64	8:15-9:05 a.m.	SAS, SSARS or Something Else – What is a Fiduciary Accounting	1 TB	Cecil Patterson and Frederick G. Spoor
	9:05-9:10 a.m.	Change Rooms		
BO65	9:10-10 a.m.	CIRA Update	1 AA	Cecil Patterson, Jr.
BO66	9:10-10 a.m.	Maximizing Tax Deductions Through Customized Retirement Plans	1 TB	William H. Block, Jr.
	10-10:15 a.m.	Break		
BO67	10:15-11:05 a.m.	Are You a Gambler or a Planner? Blueprint for a Solid Future for Elders – Part 1	1 TB	Howard S. Krooks and Ellen S. Morris
BO68	10:15-11:05 a.m.	Effectively Resolving IRS Tax Controversies in Audit/Appeal	1 TB	Mitchell S. Fuerst
	11:05-11:10 a.m.	Change Rooms		
BO69	11:10 a.m.-12 p.m.	Are You a Gambler or a Planner? Blueprint for a Solid Future for Elders – Part 2	1 TB	Howard S. Krooks and Ellen S. Morris
BO70	11:10 a.m.-12 p.m.	Taking the Case to Tax Court – What CPAs Need to Know	1 TB	Mitchell S. Fuerst



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