

CPABC PROFESSIONAL DEVELOPMENT Spring/Summer 2016 Conferences

Members in Business & Industry PD Day

June 17, 2016 | Vancouver Convention Center West

Victoria Professional Development Day

June 21, 2016 | Westin Bear Mountain Resort

Information Technology Conference 2016

June 23-24, 2016 | Vancouver Convention Center West



Choices

SUCCESS

Members in Business & Industry PD Day

June 17, 2016 | Vancouver Convention Centre, West Building

This popular conference day is all about providing accountants and financial professionals with the most balanced mix of technical and practical information that is relevant and timely. Take some time to gather and share ideas that you can bring back to your organization.

Our keynote speaker **Helmut Pastrick** will provide a global and Canadian economic outlook and how these impact B.C.'s economy. The afternoon plenary will showcase **Lesley-Ann Marriott**, sharing her expertise on organizational collaboration and silos. Your breakout options will include technical topics, as well as sessions on the Triple Bottom Line, leadership, change, and using technology to lead more effectively.

Don't miss out on this information-packed conference, and on the chance to network with other members in business and industry.

AGENDA

8 - 8:30AM	Registration & Continental Breakfast
8:30 - 8:40AM	Welcome and Introduction
8:40 - 10AM	Morning Keynote Economic Outlook
10 - 10:15AM	Coffee Break
10:15AM - 12PM	Concurrent Breakouts <ul style="list-style-type: none">- Being in the Green: An intro to the Triple Bottom Line- Leading Change: More than Managing- Tax Update
12 - 1:10PM	Lunch
1:10 - 2:50PM	Afternoon Plenary Collaboration and Silos: Is One Good and the Other Bad?
2:50 - 3:10PM	Coffee Break
3:10 - 5PM	Concurrent Breakouts <ul style="list-style-type: none">- Leading in the Tech Age- Framing your Leadership Approach- Accounting and Financial Reporting Update

CONFERENCE FEE: \$475 + GST
CPD HOURS/CREDITS: 7 Hours
PD PASSPORT: Valid - 1 Passport Day

To register, please go to our website at pd.bccpa.ca/conferences or email us at pdreg@bccpa.ca. We can also be reached by phone at 604 872.7222, toll-free in BC at 1 800 663.2677.

CONFERENCE SPEAKERS



THERESA BLANCHETT, CPA, CA, is a Director within PwC's Sustainable Business Solutions, Risk Assurance Services group. With a desire to apply her CPA to make the world a better place, Theresa helps companies in developing their sustainability programs, processes and reporting across many industries.



BILL CORBETT, CPA, CA is the Director of Business Performance at Vancity, Canada's largest community credit union. In his current role, he is focused on reframing reporting to ensure management decisions are made based on community outcomes and align with Vancity's goal of building health communities. Bill's diverse experience includes leadership roles in audit, project management, business development, marketing and operations.



ROBERT GILFOYLE has over 15 years experience offering leadership training to public and private sector organizations, including Fortune 500 companies in North America, Asia, Europe, and Africa. He has developed particular expertise in providing leadership development programs to the professional services sector including to accountancy, legal, and management consulting.

DIANE McDONALD, CPA, CA has been a sole practitioner in public practice for over 30 years, providing consulting, monitoring and professional practice services throughout B.C.. Diane assists public companies with initial and continuing Canadian and SEC financial reporting obligations and provides accounting and financial reporting consultation services on the application of IFRS, ASPE and U.S. GAAP. Diane also develops and presents sessions for both preparers and auditors of financial statements.



LESLEY-ANN MARRIOTT, PCC is an executive Coach and former executive. She has invested thousands of hours coaching senior leaders and teams, many of whom are professional accountants. Described as "edgy and fun", her sessions are highly interactive and entertaining. Lesley-Ann is Principal at Marriott Management Group, Associate Faculty at Royal Roads University - Executive Coaching Program, and Faculty for CPA's Executive Leadership Programs.



GUY NASMYTH, Ph.D. is a dynamic and thought-provoking facilitator. His lively and interactive style helps participants to best understand and work with the art and science of mindful leadership. Guy works with public and private sector clients and practices globally. He is a faculty member for graduate programs at Royal Roads University and the University of Victoria.



HELMUT PASTRICK is Chief Economist for Central 1 Credit Union, the central financial facility and trade association for the B.C. and Ontario credit union systems. He provides economic analysis and forecast services to the credit union system and to the public via the Economic Analysis of B.C. & Ontario and other publications. Prior to joining the Central 1 Credit Union in 1997, he spent many years with the Canada Mortgage and Housing Corporation in B.C.



SHANE ONUFRECHUK, CPA, CA is a Partner, Tax at KPMG LLP. He focuses on Canadian Corporate Tax, PPP project finance structuring, corporate reorganizations, acquisitions and advising other professionals on tax matters. He is active in CPABC professional development by teaching and developing courses for CPA Western School of Business & the Sauder School of Business.



TAMMY TOWILL, MBA, FCPA, FCMA is a partner in the Cordura Group providing business and financial advisory services and related education and training programs to communities and organizations seeking growth or change. For over 20 years, Tammy has worked with private and public sector companies throughout North America and Europe. Tammy is also faculty for CPA's Executive Leadership Programs.

Members in Business & Industry PD Day **SESSION DESCRIPTIONS**

8:30 – 8:40AM WELCOME & INTRODUCTION

Welcome and introductory remarks from the *Conference Chair*
[Simone Leonard](#)

8:40 – 10:00AM KEYNOTE

ECONOMIC OUTLOOK

[Helmut Pastrick](#)

Helmut will share his perspective on the economic outlook for the year ahead and discuss the challenges in the global economy along with their impact on Canada and British Columbia. Key B.C. industry conditions and forecasts, consumer and investment spending trends and forecasts, and some regional economic information will also be presented.

10:00 – 10:15AM COFFEE BREAK

10:15AM – 12:00PM CONCURRENT SESSIONS

BEING IN THE GREEN: AN INTRO TO THE TRIPLE BOTTOM LINE

[Theresa Blanchett & Bill Corbett](#)

We've heard about the value of the Triple Bottom Line (TBL) and Corporate Social Responsibility (CSR), but what is their true value? Come learn about TBL and CSR, and bringing these ideologies to life in your organization.

Theresa and Bill from PwC and Vancity, respectively, will share how these "buzz words" were applied in their organizations and those of their clients. They will discuss the successes and hiccups they faced along the way. The session will also provide key insights and essential first steps in exploring how to introduce TBL possibilities within your own organization, with time for Q&A.

LEADING CHANGE: MORE THAN MANAGING

[Tammy Towill](#)

Our changing and dynamic environments create both tremendous opportunities and significant challenges. In this interactive session we will explore the human elements of change and what drives resistance in ourselves and our teams. This session will help you develop a greater understanding of change dynamics and consider tools to help assess risk and control to better enable you to engage and lead within these changing environments.

TAX UPDATE

[Shane Onufrechuk](#)

Do you feel that you are not quite up-to-date in the ever changing world of tax cases and legislation? It seems that no matter how much we read, something always seems to slip between the cracks. In this session, Tim will analyze topical court cases and government pronouncements in an attempt to fill in those holes and provide you with insights to stay on top of the hot topics of the day.

12:00 – 1:10PM LUNCH

1:10 – 2:50PM AFTERNOON PLENARY

COLLABORATION AND SILOS: IS ONE GOOD AND THE OTHER BAD?

[Lesley-Ann Marriott](#)

The business world is becoming increasingly complex, bringing many new challenges to our workplaces. Today's teams are different - they require more diversity, virtual-based cooperation using more technology and team members require higher levels of expertise to solve global business challenges. Leaders are looking to strengthen their organization's ability to perform these complex, collaborative tasks, but many wonder how to do that.

In this session we'll explore some of the barriers to creating teams that are uniquely designed to solve modern business challenges and which levers to pull to improve team innovation in collaborative tasks. Key topics include essentials of collaboration such as the "collaboration paradox", rules of participation, role clarity and task ambiguity, and the four crucial team traits that can undermine collaboration. We'll discuss identifying how silos develop, ways to bust it and leadership practices that encourage collaboration and break down these silos. You will also learn how to leverage conflict to increase collaboration.

2:50 – 3:10PM COFFEE BREAK

3:10 – 5:00PM CONCURRENT SESSIONS

LEADING IN THE TECH AGE

[Robert Gilfoyle](#)

Worried that you are leading tech-savvy Millennials, but don't have the same ease with technology? Don't be; they'd rather you lead in a way that enables them to make the most of business technology than be Snapchat savvy. Come join us to find out more!

A case study on how technology can improve cross-functional collaboration, real-life stories and Yammer - an Enterprise Social app will be used to discuss creating environments where people are willing and able to embrace new technology, how to motivate people around the use of business technology, and attitudes and particular leadership skills that enable followers to be successful in tech-driven workplaces.

FRAMING YOUR LEADERSHIP APPROACH

[Guy Nasmyth](#)

Leadership is the subject of so many articles, research studies, books and even movies. We are taught its best practices in workshops and graduate programs and it seems that every guru or author has the one definitive set of rules that will make you a great leader. Despite all the attention and with many "experts" defining leadership as a simple linear process of one individual influencing another, a group or an organization, few seem to ask the deeper questions; what is leadership, what can it be, and how can it serve us?

This session will help you uncover your overarching leadership frame, one that best suits your style, preferences and situation to help you more mindfully achieve your leadership potential.

ACCOUNTING AND FINANCIAL REPORTING UPDATE

[Diane McDonald](#)

This session will provide an overview of recent and upcoming developments in accounting standards.

Brief summaries of developments that have impacted financial reporting over the last twelve months will be discussed.

Victoria Professional Development Day

June 21, 2016 | Westin Bear Mountain Resort, Victoria

Our Victoria Professional Development Day is geared specifically to meet your diverse PD needs. Current tax and accounting updates, personal and professional development topics, and the latest technical information, will all be brought together to provide you with a fresh perspective on professional development.

Our two keynote speakers will anchor the day, with **Bryan Yu** providing a global and Canadian economic outlook and how these impact B.C.'s economy, and **A.R. Elangovan** discussing the dynamics of trust. And our lineup of breakout sessions will provide you with an assorted buffet of personal development and technical topics.

Don't miss the opportunity to be part of this high value conference day, and the chance to network with your peers.

AGENDA

8 - 8:30AM	Registration & Continental Breakfast
8:30 - 8:40AM	Welcome and Introduction
8:40 - 10AM	Morning Keynote Economic Outlook
10 - 10:15AM	Coffee Break
10:15AM - 12PM	Concurrent Breakouts <ul style="list-style-type: none">- Value-focused Interactions: Three Steps for Outstanding Outcomes- Framing your Leadership Approach- Tax Update
12 - 1:10PM	Lunch
1:10 - 2:50PM	Afternoon Plenary How Do I Trust Thee? Let Me Count the Ways...
2:50 - 3:10PM	Coffee Break
3:10 - 5PM	Concurrent Breakouts <ul style="list-style-type: none">- Intro to Financial Planning and Asset Allocation Principles- Having the Right Conversation

CONFERENCE FEE: \$475 + GST
CPD HOURS/CREDITS: 7 Hours
PD PASSPORT: Valid - 1 Passport Day

To register, please go to our website at pd.bccpa.ca/conferences or email us at pdreg@bccpa.ca. We can also be reached by phone at 604 872.7222, toll-free in BC at 1 800 663.2677.

CONFERENCE SPEAKERS



TERESA COMEY, MA, CSODP is an organizational development consultant, and facilitator. Teresa has coached teams in the project management, government, private and public sectors, and has developed leadership, communication and planning strategies. Teresa is faculty member in organization behaviour and business management at BCIT, in project management at the Sauder School of Business, and past president of B.C. Org. Development Network.



A.R. ELANGO VAN (ELANGO), B. Com., MBA, Ph.D. is a 3M National Teaching Fellow, a UVic Distinguished Professor and Director of International Programs at Gustavson School of Business, University of Victoria. Dr. Elangovan has been a professor of Organizational Behaviour at the Gustavson School of Business since 1992. He focuses on wellbeing at work, leadership, trust, and negotiations. He served as Associate Dean from 2008-2011 and has been Director of International Programs since 2003.



NORMA GLENDINNING, MBA, CMC is a senior consultant at Berlineaton with 20+ years of experience helping organizations improve their effectiveness. Norma started her consulting career at KPMG and then joined the BC Auditor General's Office where she advanced to the position of Assistant Auditor General. Norma left government in 2010 to become an independent management consultant, and joined Berlineaton in January 2012.

DIANE McDONALD, CPA, CA has been a sole practitioner in public practice for over 30 years, providing consulting, monitoring and professional practice services throughout B.C. Diane assists public companies with initial and continuing Canadian and SEC financial reporting obligations and provides accounting and financial reporting consultation services on the application of IFRS, ASPE and U.S. GAAP.



GUY NASMYTH, Ph.D. is a dynamic and thought-provoking facilitator. His lively and interactive style helps participants to best understand and work with the art and science of mindful leadership. Guy works with public and private sector clients and practices globally. He is a faculty member for graduate programs at Royal Roads University and the University of Victoria.



SHANE ONUFRECHUK, CPA, CA is a Partner, Tax at KPMG LLP. He focuses on Canadian Corporate Tax, PPP project finance structuring, corporate reorganizations, acquisitions and advising other professionals on tax matters. He is active in CPABC professional development by teaching and developing courses for CPA Western School of Business & the Sauder School of Business.



TANNER PHILP, CPA, CA, CIM is an Investment Counsellor at RBC PH&N Investment Counsel where he is responsible for managing private client discretionary portfolios for individuals, their families and their companies. In managing all aspects of his clients' investments, he draws on his extensive experience and a network that includes accountants, lawyers, specialists in tax, legal, insurance and estate planning and other investment professionals to deliver integrated wealth management solutions to his clients.



BARBARA VANDERLINDEN, FCPA, FCMA is the principal at View Consulting with over 30 years of financial management, accounting and assurance experience. She focuses on strategic planning, financial management, and performance reviews and evaluations. Barbara worked for the Auditor General of BC. For over 15 years she has taught at the graduate, post graduate, and executive level at CMABC, Royal Roads University, UVic and Camosun College.



BRYAN YU, MA is senior economist for Central 1 Credit Union, the umbrella organization for the credit union system in B.C. and ON. He provides economic analysis and forecasting to credit unions and frequently comments on the B.C. and national economies for major media outlets. Bryan was an economist with the B.C. Real Estate Association and Canada Mortgage and Housing Corporation. He is a director for the Canadian Association of Business Economists. Bryan holds degrees in Economics from Simon Fraser University and the University of Manitoba.

8:30 – 8:40AM WELCOME & INTRODUCTION

Welcome and introductory remarks from the *Conference Chair*
Mia Maki

8:40 – 10:00AM KEYNOTE

ECONOMIC OUTLOOK

Bryan Yu
 Bryan will share his perspective on the economic outlook for the year ahead and discuss the challenges in the global economy along with their impact on Canada and British Columbia. Key B.C. industry conditions and forecasts, consumer and investment spending trends and forecasts, and some regional economic information will also be presented.

10:00 – 10:15AM COFFEE BREAK

10:15AM – 12:00PM CONCURRENT SESSIONS

**VALUE-FOCUSED INTERACTIONS:
THREE STEPS FOR OUTSTANDING OUTCOMES**

Barbara Vanderlinden & Norma Glendinning
 As an accounting professional, your purpose is to provide value to both internal and external stakeholders. This session will provide tips and tools to create more effective interactions with clients and colleagues. We will outline a simple three-step process to help you begin any project or engagement in a way that allows you best understand others' needs and expectations, assess progress against these throughout, and close in a way that adds the most value to them and their organization.

FRAMING YOUR LEADERSHIP APPROACH

Guy Nasmyth
 Leadership is the subject of so many articles, research studies, books and even movies. We are taught its best practices in workshops and graduate programs and it seems that every guru or author has the one definitive set of rules that will make you a great leader. Despite all the attention and with many "experts" defining leadership as a simple linear process of one individual influencing another, a group or an organization, few seem to ask the deeper questions; what is leadership, what can it be, and how can it serve us?
 This session will help you uncover your overarching leadership frame, one that best suits your style, preferences and situation to help you more mindfully achieve your leadership potential.

TAX UPDATE

Shane Onufrechuk
 Do you feel that you are not quite up-to-date in the ever changing world of tax cases and legislation? It seems that no matter how much we read, something always seems to slip between the cracks. In this session, Tim will analyze topical court cases and government pronouncements in an attempt to fill in those holes and provide you with insights to stay on top of the hot topics of the day.

12:00 – 1:10PM LUNCH

1:10 – 2:50PM AFTERNOON PLENARY

HOW DO I TRUST THEE? LET ME COUNT THE WAYS ...

A.R. Elangovan (Elango)
 In this session we will explore the dynamics of trust in interpersonal and organizational relationships, the elements of trustworthiness, the various strategies for enhancing it, and conditions under which trust may erode. Professor Elangovan will share recent developments in trust research and discuss helpful tools for building trust in work, professional, and business relationships. He will focus on the need for and meaning of trust, the impact it has on our relationships and performance, different forms of trust (cognitive, affective and institutional), how trust can be lost, and the implications for repairing broken trust.

2:50 – 3:10PM COFFEE BREAK

3:10 – 5:00PM CONCURRENT SESSIONS

INTRO TO FINANCIAL PLANNING AND ASSET ALLOCATION PRINCIPLES

Tanner Philp
 This session will outline the building blocks of a financial plan, and help you understand asset allocation choices. Using financial planning software, we will review viable and non-viable retirement scenarios and the key variables that impact success and failure. We will then discuss the principles of asset allocation, portfolio construction and risk-and-return. You will develop a greater understanding of how to structure your own portfolio, and/or develop a better benchmark against which to gauge your financial advisor. This session is for those newer to investment management.

HAVING THE RIGHT CONVERSATION

Teresa Comey
 There comes a time when you have to have a conversation that you dread. This session is about learning the essentials of having those tough conversations, when you're feeling in the hot seat and things are not going how you expected. It's about learning skills to give you the confidence to handle yourself in those moments, not about being a perfect communicator, nor about being tactful, or even nice.
 Bring a situation you wish you handled better; a conversation that ended badly, asked for a raise, or a sensitive issue you need to address, but don't want to (or don't know how.) You will be introduced to a less stressful and more productive way to have that conversation.

ACCOUNTING AND FINANCIAL REPORTING UPDATE

Diane McDonald
 This session will provide an overview of recent and upcoming developments in accounting standards. Brief summaries of developments that have impacted financial reporting over the last twelve months will be discussed.

Information Technology Conference 2016

June 23-24, 2016 | Vancouver Convention Centre, West Building

The *Information Technology Conference 2016* strives to be the touchstone for members who want the best for their customers and clients. Each session has been custom-tailored to enhance the day-to-day working environment of professional accountants. This year's conference will offer *15 breakout titles to choose from!*

Keeping current with the latest technologies as well as determining what applications are worth implementing can be a daunting task. This conference offers practical technology topics designed specifically to help alleviate heavy workloads of today's busy accountants.

CONFERENCE FEE: \$875 + GST
CPD HOURS/CREDITS: 14 Hours
PD PASSPORT: Valid - 2 Passport Days

To register, please go to our website at pd.bccpa.ca/conferences or email us at pdreg@bccpa.ca. We can also be reached by phone at 604 872.7222, toll-free in BC at 1 800 663.2677.

CONFERENCE SPEAKERS



WARD BLATCH, CA is a partner with K2 Enterprises Canada. Since joining K2 Enterprises in 2005, Ward has provided consulting and training services throughout the United States and Canada. Ward also has his own practice in Nova Scotia which focuses on the issues of small accounting firms and professional businesses, providing training, support, and network evaluations.



THOMAS STEPHENS maintains professional memberships with the American Institute of Certified Public Accountants and the Georgia Society of Certified Public Accountants. In 2003, he affiliated with K2 Enterprises, and in 2007, he joined the firm as a partner. To date, he has lectured nationally on subjects such as internal controls for small businesses, technology strategies, computer hardware and software applications, tax strategies and compliance, and financial accounting standards and applications.



BRIAN TANKERSLEY is a consultant based in Farragut, Tennessee. Brian is a frequent speaker at national continuing education courses on auditing and technology for K2 Enterprises, and publishes a nationally recognized blog on accounting and technology. He also writes a column and serves as the Technical Editor for *The CPA Practice Advisor*. Brian was recognized as one of the Top 25 People in Public Accounting Technology in 2011 and 2012 by *Cygnus Business Media*. Brian is both a Certified Public Accountant and Certified Information Technology Professional.

AGENDA

DAY 1

- 8:00 - 8:30AM Registration and Continental Breakfast
- 8:30 -10:10AM **General Session**
Tech Update 2016
- 10:10 - 10:20AM Break
- 10:20AM - 12PM **Concurrent Breakouts**
- A New Day, A New Technology Way
 - Securing the Perimeter: A Management View
 - CPA Firm Technology Solutions
- 12:00 -1:00PM Lunch
- 1:00 - 2:40PM **Concurrent Breakouts**
- The Internet of Things/Get Organized with Evernote and OneNote
 - Integrating Excel with Word and PowerPoint
 - Should Your Next Computer Even be a Computer
- 2:40 - 2:50PM Break
- 2:50 - 4:30PM **General Session**
Excel Top 15 All Time Hints and Tips

DAY 2

- 8:00 - 8:30AM Continental Breakfast
- 8:30 -10:10AM **General Session**
Windows 10 Tips and Tricks
- 10:10 - 10:20AM Break
- 10:30AM - 12PM **Concurrent Breakouts**
- Adobe Acrobat DC: Big Changes for PDFs
 - Profiting with Excel's Best New Features
 - Best Technologies for Small Businesses
- 12 -12:50PM Lunch
- 12:50 - 1:40PM **Concurrent Breakouts**
- PivotTable Refresher
 - Workflow to Benefit You and Your Clients
 - Fraud in the Cloud: New Risks in a New Environment
- 1:40 - 1:50PM Break
- 1:50 - 2:40PM **Concurrent Breakouts**
- Our Favourite Apps
 - Online Accounting: Features & Functions
 - Create Stunning Dashboards with Power BI Desktop
- 2:40 - 2:50PM Break
- 2:50 - 4:30PM **General Session**
Critical Tips for Avoiding Identity Theft

8:30 – 10:10AM GENERAL SESSION

TECH UPDATE 2016

[Brian Tankersley](#)

We have more new technology to consider this year than almost any year in the last decade. Hardware and software businesses are changing quickly, the Cloud impacts business decisions, mobile strategies are becoming clearer, and the Internet of Things is a game-changer on all fronts. In this keynote session, you will learn how to create a technology roadmap that helps you to improve organizational efficiency and avoid pitfalls.

10:10 – 10:20AM COFFEE BREAK

10:20AM – 12:00PM CONCURRENT SESSIONS

A NEW DAY, A NEW TECHNOLOGY WAY

[Ward Blatch](#)

As technology continues to evolve, so too must our business practices. Failing to capitalize on new ways and techniques for completing tasks mean that we may be leaving tremendous amounts of productivity on the table. Further, not matching our business processes to today's technologies can jeopardize the security of sensitive information. In both of these cases, the end result is that our organizations are not as competitive as they can and should be. Don't get left behind! Join us for this session to examine how you can take full advantage of today's technologies to advance your business practices, processes, and workflows so that you and your team are working at peak efficiency.

SECURING THE PERIMETER – A MANAGEMENT VIEW

[Tommy Stephens](#)

Security is and should be on everyone's radar. Whether you control security choices or not, you can raise your awareness and ask the right questions by attending this session. Understand the changes in firewalls, anti-virus, encryption and other tools so you can ask the right questions of your team or contractors. This session will also help you understand the risks you currently have and provide ideas on how to mitigate and minimize your exposure.

CPA FIRM TECHNOLOGY SOLUTIONS

[Brian Tankersley](#)

Would you like to work less while continuing to provide great client service, superior team member experiences, and the right partner profitability? Applying the right technology to the problems of your firm can accomplish all three of these objectives. Learn about the new and best approaches in technology in CPA firms in this session.

12:00 – 1:00PM LUNCH

1:00 – 2:40PM CONCURRENT SESSIONS

THE INTERNET OF THINGS

[Brian Tankersley](#)

We live and work in an Internet-connected world and, increasingly, various Internet-connected devices are appearing to help us solve countless problems. Collectively, these devices constitute "The Internet of Things (IoT)." Learn about IoT along with how to deploy plan for connectivity, privacy, security, and management. Additionally, you will learn numerous apps and services that can assist you with specific tasks, without requiring additional hardware.

GET ORGANIZED WITH EVERNOTE AND ONENOTE

[Brian Tankersley](#)

Evernote and OneNote are two of the best tools available for managing your daily activities and related data. Yet few business professionals take advantage of these tools and, consequently, items seem to "slip through the cracks." Learn how to take advantage of Evernote and OneNote to become better organized in your professional and personal lives. Beyond basic note-taking, you will learn about linking, embedding, and multi-user environments.

INTEGRATING EXCEL WITH WORD AND POWERPOINT

[Tommy Stephens](#)

Excel is the accountants' tool of choice for analyzing data, but their analyses often find their way into formal reports and presentations. Most accountants and business professionals use simple cut-and-paste processes or re-key their analyses to integrate them into Word and PowerPoint, but these Microsoft Office products offer a full range of options for integrating data among and between them. This session contains all of the tips, tricks, and techniques necessary to ease the process of integrating Excel with Word and PowerPoint.

SHOULD YOUR NEXT COMPUTER EVEN BE A COMPUTER?

[Ward Blatch](#)

With ever-increasing power built-in to tablets, convertibles, and smartphones, do you really need a desktop or laptop computer anymore? If you could run all of your applications and services from a mobile device that is connected to a full-size monitor and keyboard, would this cause you to re-think future computer purchases? Across the spectrum of major mobile operating systems - Android, iOS, and Windows Mobile - it is becoming increasingly possible to operate exclusively from a single mobile device and in this session, you will learn just how practical it may be for you to do precisely that. If you are trying to simplify your technology footprint, join us in this session to learn whether you really need yet another new computer.

2:40 – 2:50PM COFFEE BREAK

2:50 – 4:30PM GENERAL SESSION

EXCEL'S TOP 15 ALL TIME HINTS AND TIPS

[Tommy Stephens](#)

Take your Excel productivity and efficiency to a new level by learning about fifteen of Excel's greatest features and functions. In this session, you will learn how to turbocharge your Excel workbooks with features such as Fuzzy Lookups and Inquire, along with tips for solving rounding issues and reducing spreadsheet errors. After you complete this session and implement the tips you learn in it, your Excel productivity will be at levels you may have never thought possible.

8:30 – 10:10AM GENERAL SESSION

WINDOWS 10 TIPS AND TRICKS

Ward Blatch

You've made the move to Windows 10. The Start Menu has returned and its cloud integration is obvious, but most everything else is unfamiliar. This session will help you setup and customize Windows 10 and improve its performance, security, and privacy. From navigation to setting default applications to configuring backup, this webinar provides the needed guidance. Plus, we will introduce you to virtual desktops, the digital assistant, the unified notifications area, and provide a detailed overview of the Settings area - where you can configure the core of Windows 10 settings. Don't miss this opportunity to jump start your transition to Windows 10.

10:10 – 10:20AM COFFEE BREAK

10:20AM – 12:00PM CONCURRENT SESSIONS

ADOBE ACROBAT DC – BIG CHANGES FOR PDFS

Ward Blatch

With the introduction of Adobe Acrobat DC, Adobe changed the game on how we work with PDF documents. More than just "another new software version," Acrobat DC offers a number of new outstanding productivity features that you will want to take advantage of. These features, coupled with significant changes in licensing, means that Acrobat DC is a substantially different product than its predecessors.

PROFITING FROM EXCEL'S BEST NEW FEATURES

Tommy Stephens

In this session, you will learn about key new features added to Excel 2013 and Excel 2016 and how to put these features to work. Among the new tools you will learn about are Data Models, Flash Fill, and Enhanced Drill-Down and Around on PivotTables. You will also learn about six new charts added in Excel 2016 and how to use Power Pivot Power Query, and Power View for business intelligence.

BEST TECHNOLOGIES FOR SMALL BUSINESSES

Brian Tankersley

Small businesses face unique challenges when attempting to implement technology. Is the Cloud the right place to do business? What about licensing issues? Should I upgrade my hardware and software? How much is all of this going to cost? In this session, you will get the answers you need to make better technology decisions for your small business.

12:00 – 12:50PM LUNCH

12:50 – 1:40PM CONCURRENT SESSIONS

PIVOTTABLE REFRESHER

Ward Blatch

PivotTables remain Excel's most powerful feature, yet many business professionals continue to avoid using them. Learn why you should work with PivotTables, and how you can create simple, yet powerful PivotTables with ease. And perhaps best of all, once you master fundamental PivotTables, you will set the stage for even greater productivity by continuing to leverage their usefulness!

WORKFLOW TO BENEFIT YOU & YOUR CLIENTS

Brian Tankersley

Workflow provides an opportunity to improve your practice along with team member and client experience. This overview will list opportunities in your firm where workflow can make a difference in the amount of effort from your team to provide client deliverables. Learn how to develop your own customized workflows for your practice, and discover tools and techniques for implementation.

FRAUD IN THE CLOUD – NEW RISKS IN A NEW ENVIRONMENT

Tommy Stephens

Cloud-based applications have changed the way we work, play, and access information. The benefits and risks associated with software-as-a-service (SaaS) and hosted applications are very different than traditional on-premise information technology. Learn about some of the new risks associated with cloud solutions as well as some techniques which can be used to limit these risks.

1:40 – 1:50PM COFFEE BREAK

1:50 – 2:40PM CONCURRENT SESSIONS

OUR FAVOURITE APPS

Ward Blatch

Apps are the new way to solve lots of different business issues. How can you find appropriate apps? How should apps be integrated to legacy systems? Should you create your own apps? Can apps do as much as traditional systems? Attend this session to get a broad overview of useful apps.

ONLINE ACCOUNTING – FEATURES & FUNCTIONS

Brian Tankersley

With more small businesses now running their accounting in the Cloud (QBO), accounting professionals must recognize that Cloud-based accounting is here to stay, and should understand some of its advanced features that can help small businesses succeed. If you are not using Cloud accounting programs to its fullest, or are curious about the advanced features, this session will help you understand what Cloud accounting can do for small businesses.

CREATE STUNNING DASHBOARDS WITH POWER BI DESKTOP

Tommy Stephens

Microsoft has created an alternative environment for creating user-interactive dashboards without Excel. The free Power BI Desktop application allows business professionals to create stunning dashboards using quick and easy drag-and-drop processes, similar to Power View, but without the need to invest in a premium-priced version of Microsoft Office. Power BI Desktop opens a new era in data analysis and reporting. Don't miss this opportunity to see this amazing new reporting tool in action.

2:40 – 2:50PM COFFEE BREAK

2:50 – 4:30PM GENERAL SESSION

CRITICAL TIPS FOR AVOIDING IDENTITY THEFT

Tommy Stephens

Identity theft can cause irrevocable damage to an organization's reputation and change public opinion. This course will examine the major causes, factors, and outcomes of identity theft and organizational security breaches. Participants will be presented with information on how to identify when theft occurs, what information is most at risk, where the stolen information is used, and best practices on how to prevent it from occurring.