# In Just One Day, You Can Make Growing and Managing Your Practice Easier Than You Ever Thought Possible.



2005 Training and Education CPE Symposium

June 21, 2005 • New York City

## Learn how to thrive and survive in today's competitive landscape from those in the know

- What is the single, most-profitable new client service accountants are offering today?
- What are the 3 simple, proven steps you can take right now to reduce your workload and increase your profits?
- Why is having just a simple website a waste of money—what is the best way to get new, local tax and business clients?
- What are the most commonly asked and most frequently debated tax problems and how do we solve them?
- How do we unlock the secret productivity boosters hidden within EXCEL?
- Why easy-to-implement, "less-paper office" solutions are more practical for most accounting firms than complex "paperless office" conversions?
- How can you eliminate the headaches created by off-the-shelf accounting programs and bring client accounting engagements back under your full control?
- How can you win more clients by not selling them your services?

# Are You Ready?

# **Nationally Recognized Speakers**











Chandra Bhansali, Ph.D. President & Co-Founder, AccountantsWorld

Named one of the "Top 100 Most Influential People in Accounting" by Accounting Today, Dr. Bhansali is the Co-Founder and President of AccountantsWorld. He is a recognized expert in accounting technology, with many published articles to his credit.

David Cieslak, CPA Principal, Information Technology Group, Inc.

David Cieslak is a Principal in Information Technology Group, Inc., a computer consulting firm with offices in California. He specializes in micro-computer accounting systems, information security, the Windows platform, eCommerce, handheld computing, systems development and project management.

**E. Lynn Nichols, CPA**Founder, Nichols Education
Corporation

A practicing CPA for 37 years, Mr. Nichols provides tax consulting services and presents more than 100 CPE seminars sponsored by state societies of CPAs each year. Lynn is a regular contributor to Bisk Education's "CPE Network" audio and video tax updates, and a featured expert on AccountantsWorld.com.

**Rick Solomon, CPA** Founder, The Solomon Company

Rick provides inspiring, motivational seminars to thousands of CPAs and other professionals. As a recognized practice development consultant, Rick provides sales training to major companies, such as Citibank, Merrill Lynch, ADP and others.

Laurence Zuckerman, CPA, MST Director, Educational Services, AccountantsWorld

Laurence is an accounting educator and former publishing executive who frequently speaks about many accounting technology issues, most notably, the Internet and the benefits that online technology brings to the global accounting community. He has served with Price Waterhouse and Coopers and Lybrand.

While the highly competitive landscape and commoditization of bread and butter services pose serious challenges for typical accounting firms, progressive accounting firms are thriving by discovering the unprecedented opportunities available today.

### Registration Fees: Early Enrollment Fee - \$99 Seating is limited, so sign up today!

(Early Enrollment discount only available to AccountantsWorld.com members)

AccountantsWorld Member Fee - \$195

Non-AccountantsWorld Member Fee - \$295

(Activate a Free Lifetime membership to AccountantsWorld.com and receive your Symposium discount)

#### **Register Online at:**

www.AccountantsWorld.com or call 1.888.999.1366

Tuesday, June 21, 2005 • 8:30 AM - 5:00 PM
The Ramada New Yorker Hotel
481 Eighth Avenue at 34th Street, New York, NY 10001
Conveniently located across from Penn Station
and Madison Square Garden

AccountantsWorld is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville, TN, 37219-2417. Web site: www.nasba.org

## Room Rates/Pricing

Availability as of Monday, June 20, 2005 Single and Double Room rate - \$139 Single and Double Suite rate - \$189

Call 1-800-764-4680 for Reservations and ask for the "AccountantsWorld Symposium Rate" or Reservation Code: CGACCT

#### Dear Accounting Professional:

The dynamics of the accounting profession have changed significantly during recent years. In today's rapidly changing environment, keeping current with accounting technology and developments related to enhancing your client services is every bit as important as staying up to date with the core topics of our profession. While there are numerous resources available to help you stay up to date with tax, accounting and audit issues, no single resource will help keep you up to speed on the broad spectrum of topics that affect your practice. The AccountantsWorld Symposium is evidence of our commitment to help you fill the gap. In just one day you will learn new developments in tax and accounting, as well as other important areas that will directly impact your practice, including leading-edge accounting technology and practice development opportunities and techniques. We are confident that you will walk away with highly useful, practical information and tools for advancing your practice that you will not find in any one-day forum.

Chandra and Sharada Bhansali Co-Founders, AccountantsWorld

Registration and Refreshments: 8:30 AM Lunch: 12:30 P/

Keynote Address: Tax and Accounting Services Have Become Commoditized. So What! Chandra Bhansali, Ph.D., President and Co-Founder, AccountantsWorld 9:00 AM

Dr. Bhansali delivers this inspiring and thought-provoking keynote address, sharing his unique insight about the unprecedented opportunities now available to accounting firms and how the new paradigm of Accountant-Centric solutions will help forward-thinking accounting firms survive and thrive.

#### Beyond Websites. Your Internet Strategy and Your Practice

Instructor: Laurence K. Zuckerman, CPA, MST, Director of Educational Services, AccountantsWorld

#### 9:30 AM, CPE Credit: 1 Hour, Specialized Knowledge

To take advantage of the unprecedented opportunities the Internet offers accountants, you will need to develop an Internet strategy that's right for your firm. Learn how accounting firms nationwide, including firms in the New York area, are making the web work for them. See best-of-breed accounting firm websites in action and learn about the content and tools that can transform a static accounting firm website into a dynamic online accounting office, empowering you to offer 24/7 services to your existing clients and prospects. Learn which Internet resources are specifically designed for the practicing accountant. Discover the 3 ways to profit from the Information Superhighway.

#### The Deafening Sounds of Silence: How Sarbanes-Oxley Impacts Your Firm and Clients John W. Green, CPA, Partner, Audit Practice, Marcum & Kliegman, LLP

John W. Green, CPA, Partner, Audit Practice, Marcum & Kliegman, LLP 9:30 AM, CPE Credit: 1 Hour, Accounting and Auditing

The Sarbanes-Oxley Act (SOX) has had a far-reaching impact on the way public companies report and disclose financial information. What are the benefits and costs of SOX? What opportunities and pitfalls does SOX create for accountants and clients? These and other compelling issues will be explored by experts who will share their tales from the trenches. Any CPA who audits or works for a publicly traded company should attend this informative session.

#### 2005 Tax Law Update

Instructor: E. Lynn Nichols, CPA

10:30 AM, CPE Credit: 1 Hour, Taxation

E. Lynn Nichols, CPA, well-known tax expert and AccountantsWorld tax discussion group Moderator, offers a stimulating one-hour Tax Law Update, highlighting changes affecting individuals and businesses for tax-year 2005 and beyond. This is a can't-miss session for tax practitioners.

Covered topics will include Working with the Qualified Domestic Production Deduction, Depreciation and Section 179 Deductions After the 2004 Tax Acts, S Corporation Basis and Shareholder Distributions, The Tax Value of a Child, and more.

#### Excel with EXCEL

Instructor: Richard B. Lanza, CPA, CFE, PMP, President, Cash Recovery Partners, LLC

10:30 AM, CPE Credit: 1 Hour, Specialized Knowledge

The Microsoft EXCEL spreadsheet remains one of the most popular core productivity tools for accountants. In this EXCEL training course designed specifically for accountants, you will learn to excel with EXCEL. Our expert instructor has provided training to many accountants. You will leave with spreadsheet templates you can use or modify for your practice, learn special Macros, receive exposure to the fundamentals of Pivot Tables and more...

#### The Economics of Online Client Payroll

Instructors: Robert Torella and Carlos Garcia, AccountantsWorld
11:30 AM, CPE Credit: 1 Hour, Accounting and Auditing

For years, accountants have been making payroll service bureaus rich by sending clients to them. For the first time, the Internet is making it easy for accountants to receive a year-round income stream from client payroll services, without hassle. Whether you are a sole practitioner or a mid-size firm, you will be very interested to learn how your peers are profiting by offering Internet-based client payroll services, and how you can profit too. You will also witness first-hand just how easily you, your clients or Internet-based payroll services can process client payroll online, generating a new recurring revenue stream for your firm.

Is it a WIRED, WIRED, WIRED, World? Or should your firm go WIRELESS? Instructor: David Cieslak, CPA, Principal, Information Technology Group, Inc. 11:30 AM, CPE Credit: 1 Hour, Specialized Knowledge

What are the advantages and costs of going wireless? What can you actually accomplish by going wireless that you can't otherwise? In this stimulating workshop, the well known gadget and wireless expert, David Cieslak, CPA, demonstrates how the latest advances in wireless can be put to practical use.

# Beyond Windows, Beyond the Web: How Will the New Breed of Accountant-Centric Solutions Revolutionize The Way Your Work? Recorded Presentation and Question & Answer Session 1:30 PM

A new breed of fully customizable Accountant-Centric solutions is changing the way accountants are managing client accounting engagements. This informative and entertaining presentation will show you how accountants are boosting productivity and regaining control over their client engagements by customizing the tools their clients use to perform client accounting, payroll and additional core services.

Yes, Accountants, There Is Relief For Your Client Accounting Headaches. Instructor: Laurence K. Zuckerman, CPA, MST and Vivek Mehta, Controller, AccountantsWorld

#### 2:00 PM, CPE Credit: 1 Hour, Accounting and Auditing

Let's face it. Off-the-shelf accounting software causes a lot of problems for accountants. Different clients use different versions, which aren't compatible with each other. Tracking down and fixing errors is cumbersome and time-consuming, and that's just the tip of the iceberg. Finally, there is a better way—a new breed of Accountant-Centric, client accounting software that is full-featured, web-based, and fully customizable by the accountant for each small business client. Witness a demonstration of a live interactive collaborative client accounting engagement, and see how accountants and clients are learning to say goodbye to the Small Business Accounting Blues.

Turn The "PaperLess" Office Hype into the "Less Paper" Office Reality Instructor: Robert Torella, MBA, CompTIA Inet+, CIW 2:00 PM, CPE Credit: 1 Hour, Specialized Knowledge

Have you ever misplaced a document...in your office? In your PC? For most accounting firms, the promise of the paperless office and surefire document management is still an expensive, tough-to-implement pipe dream. There is, however, a cost effective way to use the Internet to transform the hype of the paperless office into the reality of the less-paper office. We will show you how to accomplish in seconds what you have needed to do for years. You will learn the fundamentals of paperless file formats, document management, and more...

## The Top 10 Most Frequently Debated Tax Questions

Instructor: E. Lynn Nichols, CPA

3:00 PM, CPE Credit: 1 Hour, Taxation

Have you ever had a tax question you couldn't answer? Did you try posting it to the AccountantsWorld Tax forums? Thousands of accountants have, and you can too. In this fast paced and informative session, E. Lynn Nichols, CPA, analyzes the Top 10 (and beyond) Most Frequently Asked Tax Questions he encounters in the field and on the AccountantsWorld Tax discussion forums. Each year, Lynn trains thousands of CPAs nationwide with his highly popular CPE courses. He promises there will be a Q&A period during this session, so bring your toughest quandaries with you to get real world answers you can rely on.

Mining Business Data: There's Gold in That Desktop!

Instructor: Richard B. Lanza, CPA, CFE, PMP, President,

Cash Recovery Partners LLC

3:00 PM, CPE Credit: 1 Hour, Accounting and Auditing

Analyzing the data underlying the client's business and proactively explaining it so the business can benefit from it is an innovative way for accountants to add value and strengthen the coveted accountant-client relationship. In this session, you will learn how to take the tools that are likely to already be on your desktop and turn them into powerful data analysis applications, boosting your value to your clients and your practice's revenue stream.

#### **Practice Development: Best Practices**

Instructor: Rick Solomon, CPA, Founder, The Solomon Company 4:00 PM, CPE Credit: 1 Hour, Specialized Knowledge

What are the best ways to get your existing clients to buy more services from you? How do you turn fee-resistant clients into your BEST clients? Developer of the exclusive "Sell Without Selling System for Accountants," noted trainer, Rick Solomon, CPA, shares the highlights of his time-tested Practice Development Best Practices series with you.

# Trap Doors and Trojan Horses: Is the Internet Safe and Secure For Accountants and Clients?

Instructor: David Cieslak, CPA, Principal, Information Technology Group, Inc. 4:00 PM, CPE Credit: 1 Hour, Specialized Knowledge

It's 10:00 P.M. Do you know where your data is? Hundreds of billions of dollars worth of goods and services are exchanged over the Internet each year and over half of all 2004 tax returns were filed electronically. But is the Internet really safe for you and your clients? In this session, nationally recognized Security expert, David Cieslak, CPA, will teach you what practicing accountants must know about Internet security.

#### Special Surprise To Be Announced: Group Session 5:00 PM

Success comes not from doing what you want to do, or doing what you like to do. Success comes from doing what you have to do! Everyone needs motivational reinforcement to PROFIT FROM CHANGE. In a surprising and entertaining end to this rewarding day, each accountant who attends this session will receive a special gift, in addition to memorable "in the trenches" accounting insight that is certain to keep your batteries charged when times get tough.

## **Other Featured Symposium Speakers**

#### Carlos H. Garcia

Product Manager, Payroll Applications, AccountantsWorld

Certified by the American Payroll Association, and with 13 years of experience developing software, Carlos Garcia is the Product Manager for Payroll Applications at AccountantsWorld. He is one of the key members of the team that created the first ever Accountant-Centric online payroll system, Payroll Relief AC.

## John W. Green, CPA

Partner, Audit Practice, Marcum & Kliegman, LLP

Mr. Green is an Audit Partner with Marcum & Kliegman, LLP, focusing on the firm's insurance industry practice. He also provides assurance, tax, and consulting services to financial services entities, and was the engagement partner for the firm's first internal controls audit under Sarbanes-Oxley Section 404.

# Richard Lanza, CPA, CFE, PMP President

President, Cash Recovery Partners, LLC

Mr. Lanza empowers organizations to use technology to generate cash recoveries, stop profit leaks, resolve control issues, and implement process improvements. By teaching firms how to maximize their existing technology, he shows accounting professionals how to become "info magicians".

#### Vivek Mehta

Controller, AccountantsWorld

Vivek Mehta is the Controller for Accountants World. He holds an MBA in Finance and is a CFA. As both a Controller and user of accounting products and services, Vivek brings a unique perspective to the functionality of Accountants World solutions.

## Robert Torella, MBA

Senior Manager of Technical Support, AccountantsWorld

Defining the concept of multitasking at AccountantsWorld, Robert Torella manages the Technical Support Department, is a Webmaster Team Member and a Payroll Services Team Member. He came to AccountantsWorld with technical experience gained from Texas Instruments, Sun River Data Systems, AT&T and NCR.



Change Your Accounting Practice Forever In Just One Day.

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