UC 2009

29TH ANNUAL THOMSON REUTERS USERS' CONFERENCE FOR PROFESSIONAL TAX & ACCOUNTING FIRMS ★

NOVEMBER 4-7, 2009

GAYLORD PALMS RESORT AND CONVENTION CENTER® ★ ORLANDO, FLORIDA

Dear Colleague,

On behalf of Thomson Reuters, I'd like to invite you to attend our 29th Annual Thomson Reuters Users' Conference for Professional Tax and Accounting Firms, November 4-7 at the Gaylord Palms Resort and Convention Center in Orlando, Florida.

Every year we work very hard to bring you the most relevant speakers and cutting edge technology; and the 2009 Users' Conference is shaping up to be our best conference yet, with scores of fresh opportunities to help you guide your firm safely and profitably into the future.

The balmy breezes and endless entertainment of Orlando, this year's conference setting, will add even more energy and excitement to an already unique event. Through informative workshops, training sessions, and presentations, you'll meet, network, and learn with hundreds of fellow tax and accounting professionals from all over the country. Veteran conference-goers will tell you that the contacts you make here benefit you long after you're back at work, not only in friendship but in year-round support and feedback on many of the profession's most relevant issues.

As your technology partner, it's Thomson Reuters' mission to continuously help you enhance your practice. This year's new and exciting agenda will help you take advantage of innovations in technology to save time and increase process efficiencies at your firm. Thanks to your feedback, we've also adjusted some sessons and added many new topics, such as software training and social networking. But whatever you hope to take away from the Users' Conference, you can be sure you'll come home with practical tips for improvement that you can put to work for your firm immediately. Here are just a few of the highlights:

- Nationally Recognized Speakers—Our well-known accounting, technology, and motivational experts will inspire you to make this your best year ever.
- Powerful Workshops—More than 70 interesting, relevant and timely topics will help your firm grow and prosper.
- Technology Updates—Up-to-the-minute information on the world of innovation and opportunity with the latest in advanced private client portals, remote access to software, Intranets, paperless processing, network administration, and more.
- Adopting Advanced Technology Processes—Find out how the CS Professional Suite® and the Enterprise Suite™make it easy to create completely digital, end-to-end processing for taxes, payrolls, and engagements by combining integrated workflow systems, 24/7 web access, paperless capabilities, and far-reaching integration with other products, companies, and technologies.
- Product Demonstrations—Thinking about adding new products? Our professional and knowledgeable product experts will give you a personal tour so you can see the products in action for yourself.
- Software Training—Whatever your proficiency level, learn how to accomplish more work in less time and with fewer resources through CS Professional Suite or Enterprise Suite hands-on training.
- CPE Credits—You can earn up to 19 CPE credits at the conference. It's an easy and convenient way to maximize your educational experience.

We hope you'll join us for practical, profit-generating ideas and to share your own insights into the future of a very exciting profession. I look forward to seeing you in sunny Florida!

Sincerely,

Jonathan A. Baron
President
Professional Software & Services, Tax & Accounting
THOMSON REUTERS

RESERVE YOUR ROOM BY **AUGUST 31** AND YOU COULD

WIN A FOUR-NIGHT STAY IN A DELUXE LUXURY SUITE

Reserve your room by August 31 and be entered into a drawing for a four-night stay in one of the Gaylord Palms' deluxe luxury suites during the Users' Conference, or another exciting prize:

- ★ An Apple® iPhone* $200 Gift Card
- ★ A GPS Navigation System
- ★ Apple® iPod Shuffle
- ★ American Express® Gift Cards valued at $100 and $50

**Apple is not a participant in or sponsor of this promotion.*

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REGISTER EARLY AND SAVE UP TO $200!

- Register by **August 31** to **SAVE $50** with the Early Bird Discount
- 2008 Users' Conference attendees **SAVE $50**
- Additional firm attendees **SAVE $100**
- Register **ONLINE** at **CS.ThomsonReuters.com/UC** by August 31 for **FREE FINANCING**—Pay half when registering and half by October 2.



CONFERENCE AGENDA

Your registration includes the Welcome Reception, Roundtable Discussions, Three Keynote Addresses, Hospitality Suite, five meals, a selection of workshops uniquely tailored to fit your individual needs, and up to 19 hours of CPE credit.

WEDNESDAY, NOVEMBER 4

- **Pre-conference Workshops** (9:00 am – 4:00 pm)
- **Product Demo Theater** (Noon – 5:00 pm)
- **Registration Desk** (1:00 pm –5:00 pm)
- **Sales, Support, Training & Vendor Booths** (1:00 pm – 5:00 pm)
- **Casual Welcome Reception** (5:00 pm – 7:00 pm)

  Please join us Wednesday evening for a casual "come as you are" reception to get acquainted with your fellow attendees. We'll enjoy the beach party music of Coco Loco while we mix and mingle against the backdrop of the beautiful Gaylord Palms Resort. Light hors d'oeuvres will be served. The Welcome Reception begins at 5 pm and concludes at 7 pm. [**Note:** This reception is included in your conference registration fee; add $30 per non-registered guest on the registration form on page 10. Conference ID is required for admittance.]

THURSDAY, NOVEMBER 5

- **Product Demo Theater** (7:00 am – 5:30 pm)
- **Registration Desk** (7:00 am – 5:30 pm)
- **Sales, Support, Training & Vendor Booths** (7:00 am – 5:30 pm)
- **Breakfast Buffet & Demos** (7:00 am – 8:00 am)
- **Kickoff Keynote Address** – Jon Baron (8:00 am – 9:30 am)
- **Refreshment Break & Demos** (9:30 am –10:00 am)
- **Time Slot A Workshops** (10:00 am – 11:40 am)
- **Luncheon Buffet & Demos** (11:40 am – 1:10 pm)
- **Time Slot B Workshops** (1:20 pm – 3:00 pm)
- **Refreshment Break & Demos** (3:00 pm – 3:30 pm)
- **Time Slot C Workshops** (3:30 pm – 5:10 pm)
- **Roundtable Discussion Groups and Hospitality Suite** (8:00 pm – 10:00 pm)

TICKET AND ATTRACTION INFORMATION DESK

- **Wednesday, November 4** (9:00 am – 5:00 pm)
- **Thursday, November 5** (9:30 am – 5:30 pm)

FRIDAY, NOVEMBER 6

- **Product Demo Theater** (7:00 am – 5:30 pm)
- **Registration Desk** (7:00 am – 5:30 pm)
- **Sales, Support, Training & Vendor Booths** (7:00 am – 5:30 pm)
- **Breakfast Buffet & Demos** (7:00 am – 8:00 am)
- **Morning Keynote—Barry R. Schimel** (8:00 am – 8:50 am)
- **Time Slot D Workshops** (9:10 am – 10:00 am)
- **Refreshment Break & Demos** (10:00 am – 10:30 am)
- **Time Slot E Workshops** (10:30 am – 12:10 pm)
- **Luncheon Buffet & Demos** (12:10 pm – 1:30 pm)
- **Time Slot F Workshops** (1:30 pm – 3:10 pm)
- **Refreshment Break & Demos** (3:10 pm – 3:40 pm)
- **Time Slot G Workshops** (3:40 pm – 5:20 pm)
- **Friday Night Event** (6:30 pm – 10:30 pm)

SATURDAY, NOVEMBER 7

- **Product Demo Theater** (7:00 am – 8:30 am)
- **Registration Desk** (7:00 am – 11:30 am)
- **Sales, Support, Training & Vendor Booths** (7:00 am – Noon)
- **Breakfast Buffet & Demos** (7:00 am – 8:30 am)
- **Time Slot H Workshops** (8:30 am – 9:20 am)
- **Conference Wrap-up & Keynote Address—John Cassis** (10:00 am – 11:45 am)

CPE CREDIT

Thomson Reuters, Tax & Accounting, Professional Software & Services 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:

National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Website: www.nasba.org.

KEYNOTE SPEAKERS

OPENING KEYNOTE - THURSDAY, 8:00 AM TO 9:30 AM

Jon Baron

KICKOFF KEYNOTE ADDRESS

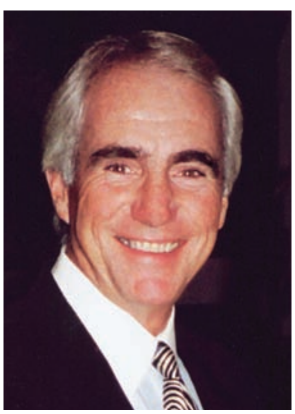
Jon Baron, President, Professional Software & Services, Tax & Accounting, Thomson Reuters, will present the latest technologies available to firms and offer a detailed explanation on how you can easily take advantage of innovations in technology to increase process efficiencies. He'll also discuss the ways recent changes in the tax and accounting profession are causing traditional single-product solutions to be replaced with advanced technology systems and processes.

FRIDAY MORNING KEYNOTE - FRIDAY, 8:00 AM TO 8:50 AM

Barry R. Schimel, CPA

HOW TO BE A HERO TO YOUR CLIENTS

Barry R. Schimel will teach you how to coach clients through the recession crisis. He is the founder of BizActions, L.L.C. responsible for program content, and has experience as a business consultant, managing partner of a large Washington D.C. area accounting firm, and co-author of several books. His tips, tools, and techniques will empower your firm to help your clients survive and succeed during both tough and boom times. You'll gain expertise in boosting your clients' bottom line and winning the confidence of prospects by offering services that differentiate your firm from competitors as well as learn strategies and ideas that will cement client relationships for a lifetime. When you leave this keynote, you'll be able to add value to your relationships by being a profit coach specializing in battle-tested business opportunities for today and tomorrow rather than what transpired in the past.



CONFERENCE CLOSING KEYNOTE - SATURDAY, 10:00 AM TO 11:45 AM

John Cassis

HUMOR, MOTIVATION, AND MENTAL TOUGHNESS

John Cassis' diverse background as an athlete, minister, publisher, company founder, inspirational speaker, husband, and father gives him a unique ability to help his audiences see life from a new perspective. Modern-day demands often cloud the most important issues in our lives. As we inevitably lose perspective, we tend to sabotage our success and compromise our passion. John shares several key points for developing mental toughness with a positive attitude, helping to re-energize lives, careers, and relationships. Regain perspective by tapping into the humor that will bridge the gap between the perfections we strive for and the imperfections we are stuck with!

ROUNDTABLE DISCUSSIONS

Among the most popular events at the Users' Conference are the roundtable discussions—organized discussion groups that focus on specific assigned topics related to practice management, marketing strategies, technological developments, and other subjects of interest. Roundtables are a mutual sharing of practical ideas that you can take with you and immediately put to work for your firm. Discussion leaders include many workshop presenters, Thomson Reuters staff, and CS Professional Suite and Enterprise Suite users. Roundtables also offer a unique opportunity to exchange ideas with colleagues from across the country in a relaxed, non-competitive environment. In fact, many attendees describe the roundtables as the most valuable part of the conference. Reserve time on your calendar Thursday evening to join us and share your experiences.

PRODUCT DEMO THEATER

Get a quick overview of our software's capabilities, features, and benefits—in less than 25 minutes. Starting on Wednesday and continuing at the breaks throughout the conference, four demo product sessions run simultaneously and feature the following:

WEB SERVICES AND DOCUMENT MANAGEMENT

NetClient CS® Portals—Learn how to elevate your firm's professional online image and enhance the services provided to your clients by providing 24/7 service using private client portal technology.

Web Builder CS®—See how easy it is to build your own professional, fully functional website in minutes. We'll demonstrate how to select graphics, add images, and import editable text to reflect your unique professional image.

FileCabinet CS™—We'll show you how to store files, reports, financial statements, and tax returns electronically on your computer, speed processing with optical character recognition (OCR) technology, access documents immediately for quick emailing, and eliminate the need for cumbersome paper files.

Paperless Payroll—See how to implement a paperless payroll process using NetClient CS, Payroll CS™, FileCabinet CS, and Web Employee—and see how profitable payroll services can be.

Virtual Office CS™—Discover how you can advance your practice with remote 24/7 access for your firm's data, files, and software.

GoFileRoom®—Learn how advanced document search techniques, project management, customized real-time data tracking, and more can increase efficiency in your practice.

PRACTICE CS®

Practice CS—See how to streamline procedures while maximizing productivity and profitability using the advanced tools built into this robust practice management application.

Project Workflow with Practice CS Project Management—We'll show you how to use Practice CS as a workflow hub for your firm, bringing together and tracking all the key information and resources you need to manage projects with ease and speed.

Manage Client Relations with Practice CS Client Management—Managing client relationships in today's business environment is more important than ever. See how the Client Management module can help you strengthen relationships with your clients and prospects by tracking all interactions and making the information available at your request.

Staff Management with Practice CS—Come view the newest module for our next generation practice management system, Practice CS. You'll see how the Staff Management module provides tools to help you efficiently manage your staff's time and schedules.

CS PROFESSIONAL SUITE ACCOUNTING

Engagement CS® Workflow for Accounting Professionals—See how Engagement CS integrates seamlessly with professional audit tools such as PPC's SMART Practice Aids™ to provide you with the ultimate in convenience and efficiency.

Engagement CS Workflow for Tax Professionals—From helpful tax code reports to full integration with UltraTax CS™, we'll show you how Engagement CS can increase the efficiency and productivity of your engagement workflow.

Accounting CS—Check out the newest addition to the CS Professional Suite. We'll show you how the many features available—including client and chart of accounts setup, transaction entry, financial statements, custom reporting, and more—can work for you.

Next Generation Payroll Products—From custom layout and report designers to real-time client access, we'll show you how Service Bureau Payroll CS and the new payroll module within Accounting CS give you even more options for your next-generation payroll business.

Service Bureau Payroll CS Software—Learn how to significantly enhance your payroll business with Service Bureau Payroll CS software, designed specifically for payroll professionals.

ULTRATAX CS™ AND GOSYSTEM® TAX

Paperless 1040—Learn how to implement a completely paperless 1040 process using Web Organizer, Web Delivery, W-2 integration, and electronic filing.

GoSystem Tax—Take a look at the program that will make tax prep in your high-volume firm a snap. See how your productivity will benefit from this powerful system.

SPECIAL DEMONSTRATIONS

Explore the New ARNE Community—Tour the expanded social networking features exclusively for our software users. We'll show you how to set up a free web account, enter your profile information, upload pictures, comment on articles, join in forum conversations, and more.

Checkpoint® for Tax Professionals—We'll demonstrate the integration between Checkpoint and UltraTax CS with an overview of this authoritative tax research tool, and show you how to get lots of tax information in one centralized online location.

Seamless Workflow Integration—Imagine how much more valuable your software can be when implemented as a part of a cohesive integrated workflow strategy. We'll showcase this process in this dynamic and engaging presentation.

myPay Solutions®—See an overview of myPay Solutions and learn how an outsourced payroll solution can improve service to your clients, while increasing your revenue.

Checkpoint for Accounting Professionals—Experience this industry-leading online research and workflow solution and its comprehensive library of information and guidance from PPC, RIA, and WG&L. You'll also see how Checkpoint Tools and PPC's SMART Practice Aids integrate.




FRIDAY NIGHT EVENT: SEAWORLD ADVENTURE PARK

Get ready to enter a world of marine life adventure! Experience heart-stopping heights on the Kraken, the spray of the ocean as you soar on Manta, wicked Sirens on your Journey to Atlantis, the wonder of a Penguin Encounter, and more.

After a short ride to SeaWorld, you'll be greeted by the beloved Shamu character and event guides who will escort you to the Whale & Dolphin Theater. There you will enjoy **a private viewing of Blue Horizons—a sea-meets-sky dolphin show**. The magic of acrobatic whales and dolphins, soaring birds, and dancing water will leave you wowed. As your private party gets started, you'll enjoy all the fun—without the wait—that SeaWorld has to offer:

- **Manta** – Soar up to 60 mph while lying face-down underneath SeaWorld's newest attraction
- **Kraken** – Orlando's tallest and only floorless roller coaster
- **Journey to Atlantis®** – The steepest, wettest, and fastest water coaster of any theme park (Rain ponchos available for guests that want to stay dry)
- **Penguin Encounter** – The largest and most technically advanced exhibit of its kind in the world, home to hundreds of penguins and alcids
- **Fun-packed Extreme Zone** – Rock wall climbing and trampoline area
- **All-you-can-eat dinner buffet with Interactive DJ** to keep the party rolling

When dinner is done, explore the attractions including the **Pacific Point Preserve**, home to California sea lions, harbor seals, and fur seals, and the **NEW Manta**! Inspired by powerful manta rays, guests will fly face-down, in a horizontal position, underneath the belly of the coaster. With a wing span of 12 feet, the giant manta will soar over sea and sky while gliding, swooping, and **diving up to nearly 60 mph through four inversions on 3,350 feet of track**. Riders will feel as if they are a manta ray soaring over the sea—so close at times that the Manta's wings skim the waves! When you've had your fill of thrills, a comfy motor coach will carry you back to the Gaylord Palms.

Thomson Reuters is pleased to sponsor this optional evening event so that you and your guests can enjoy a splashing good time at a reduced rate. The cost for the evening's activities is just **$75 per adult** and **$45 per child**, which includes transportation, dinner, drinks, and entertainment. We hope you'll join us for an evening of acrobatic dolphins, roller coasters, and more!

SPOUSE/GUEST PROGRAM

This optional program offers an opportunity for your spouse or guest to get acquainted and participate in some of the Users' Conference special events. It's also a great chance to explore the Orlando area with others while workshops are in session.

For $135 per person (includes tours, lunch, and transportation), participants in the Spouse/Guest Program are invited to attend:

- The Wednesday evening **Welcome Reception**
- The **Get Acquainted Breakfast** on Thursday morning
- **Leu Gardens** and the **Orlando Museum of Art** on Thursday, including lunch and shopping

Leu Gardens and the Orlando Museum of Art

THURSDAY, NOVEMBER 5 | 9:30 am - 4:30 pm

Begin the day touring **Leu Gardens**—almost 50 acres along the shores of Lake Rowena. You'll enjoy strolling down paths lined with camellias and azaleas, and sheltered by majestic oaks and camphor trees. The scenic walkways lead you through herb, butterfly, palm, and bamboo gardens.

Next, you're off to the **Orlando Museum of Art** where you will discover a growing permanent collection of 18th, 19th, and 20th century American art, pre-Columbian artifacts, and African objects. The American Art Collection features works by artists such as John Singer Sargent, Thomas Moran, George Inness, Georgia O'Keeffe, Ansel Adams, Suzanne McClelland, Robert Rauschenberg, Pat Steir, Morris Louis, John Chamberlain and Dennis Oppenheim, among others. Additionally, a diverse selection of national and international exhibitions tour the Orlando Museum of Art each year.

From the museum, you'll head to the **Tap Room at Dubstread Golf Club** to enjoy a delicious lunch. Dine amidst the warmth and charm of exposed wood beams, stone fireplaces, and Southern hospitality. You'll enjoy beautiful golf course views, foods prepared from scratch, and optional outdoor verandah seating, surrounded by 100-year-old oaks.

The afternoon will conclude with shopping at **Orlando Premium Outlets**—where you can find impressive savings at 150 stores—before heading back to the Gaylord Palms Resort.

FALCON'S FIRE GOLF CLUB
3200 Seralago Boulevard
Kissimmee, FL 34746
407.239.5445 | www.falconsfire.com

PRE-CONFERENCE GOLF OUTING

Enjoy the Flawless Craftsmanship of Falcon's Fire Golf Club

Back by popular demand, the pre-conference golf outing will take place at Falcon's Fire Golf Club on Wednesday, November 4, beginning at 10:00 AM. The cost is $85 per person and includes a cart and unlimited practice balls.

Note: *We will have a shotgun start as long as we have 28 players. Less players will result in assigned tee times.*

Falcon's Fire Golf Club is recognized both regionally and nationally as one of the finest Orlando golf courses. The Rees Jones Signature Designed championship golf course and spacious Clubhouse offers guests the highest in service excellence and amenities including an award-winning Golf Shop. Stretching nearly 7,000 yards from the back and providing golfers four sets of tees, Falcon's Fire offers a playable yet challenging course for relaxing with friends or a competitive tournament.

The last day to register for or cancel the golf outing is **October 13, 2009**.

ABOUT THE WORKSHOPS

This year's Users' Conference offers more than 70 different workshops and product demonstrations covering all aspects of operating an accounting practice. Descriptions of these workshops are on the following pages. The *new* symbol indicates that the workshop is new this year. Refer to the Workshop Schedule on pages 14-15 to develop your own schedule of the workshops you want to attend. We recommend selecting the courses you most want to attend first, and scheduling other courses around those. Sessions run for 50 or 100 minutes, but some sessions span more than one time slot. Indicate your workshop selections on the registration form on page 10 (or register online at **CS.ThomsonReuters.com**).

WORKSHOP SCHEDULE

On the Workshop Schedule you'll see:

- **Time Slot(s)** showing when each workshop is scheduled.
- **CPE Field of Study** for each session. You can earn one CPE credit for each 50 minute time slot and two CPE credits for each 100 minute time slot. (See details about CPE credit information under CPE Credit, page 4.)
- **Prerequisites or Proficiency Levels** are given for some workshops to indicate the skill or experience level for which the class has been designed. **Please note these requirements** (found in the workshop description only) so you can be sure the class is appropriate for your skill level. In fairness to other participants, we cannot adjust the course content or spend extended time answering questions of users who do not meet the published prerequisites.
- **Session Numbers** are shown at the end of each workshop description. They include the time slot in which the session is scheduled (A, B, etc.) and correspond with the Workshop Schedule on pages 14-15. Many popular workshops are offered more than once during the Conference to give you scheduling options. These workshops will have a different session number for each time slot in which they are offered.

WORKSHOP/SEMINAR LEADERS

Our instructors include CS Professional Suite and Enterprise Suite users who have built highly successful practices, nationally recognized experts in specialized areas of the accounting profession, and talented staff from several different areas within Thomson Reuters, Tax & Accounting.

WORKSHOP CATEGORIES

Workshops fall into the following two categories:

- **Product & Services Training**—Application-specific training in lecture, hands-on, or discussion group format. Hands-on sessions give you interactive training in specific CS Professional Suite and Enterprise Suite products. **Participants work in teams of two persons per computer.** Hands-on workshops often span multiple sessions and require an additional charge to help cover the cost of computer equipment.
- **Professional Topics**—Presentations and discussions giving practical insights on current topics of interest to accountants. These workshops are led by instructors who are experts in their respective fields and can offer valuable, professional insights. This year's professional topics fall into three categories: Technology, Tax, and Practice Management.

UC 2009

CONFERENCE REGISTRATION

Please complete this registration form or register online at **CS.ThomsonReuters.com/UC**. A registration form must be completed for each person who will be attending the conference; photocopy this form as needed. The registration fee for this conference is $1,095. **Register online by August 31 for FREE financing**. See website for details.

Name: ____________________

Preferred first name on badge: ____________________

Firm: ____________________

Firm ID: ____________________

Address: ____________________

City: ____________ State: _____ ZIP: ________

Phone: ____________ Fax: ____________

Email: ____________________

Is this your first Thomson Reuters Users' Conference? ❍ Yes ❍ No

Will you be attending the Welcome Reception? ❍ Yes ❍ No

How many Users' Conferences have you attended? ________

We encourage you to register online at **CS.ThomsonReuters.com/UC**. However, if you prefer to fax or mail your registration, please make a photocopy of this form for every individual you wish to register. Complete the registration, course selection, and payment details and mail or fax the registration form(s) with payment to:

Thomson Reuters, Tax & Accounting, Professional Software & Services
Attn: UC Registration, 7322 Newman Boulevard, Dexter, MI 48130

Fax 734.426.5946 | **Phone** 800.968.0600
(press 1, then 5, to speak with a Customer Service Representative)

REGISTRATION FEE | Your registartion fee includes:

- Keynote addresses and workshops for which you wish to register
- Breakfast Thursday, Friday, and Saturday; and lunch Thursday and Friday
- Welcome Reception
- Roundtable discussion groups and Hospitality Suite on Thursday evening
- Users' Conference materials

CONFERENCE REGISTRATION FEE

First Attendee from Firm $1,095
Additional Attendee from Firm .... $995 $________

EARLY-BIRD REGISTRATION—Subtract
(Must be postmarked on or before August 31, 2009) .... -$50 $________

ATTENDED 2008 CONFERENCE—Subtract .... -$50 $________

HANDS-ON COMPUTER FEE
(Two participants will be assigned to each computer.)

❍ Write-Up CS General Ledger Essentials 2 .... $40
❍ Write-Up CS Financial Statement Formatting Essentials 2 .... $40
❍ Financial Analysis CS Essentials $40
❍ Payroll Essentials 2 .... $40
❍ Payroll Year-end Skills $40
❍ Productivity Tips for Fast Bank Reconciliations $40
❍ CBS Accounts Payable/Receivable Essentials $40
❍ Accountant's Assistant Import from QuickBooks Pro $40
❍ UltraTax CS Setup Essentials $40
❍ GoSystem Tax 1065 Essentials 1 .... $20
❍ GoSystem Tax 1065 Essentials 2 .... $20
❍ Practice CS Project Management & Workflow $40
❍ Practice CS Processing Essentials $40
❍ Practice CS Setup Essentials $40
❍ Practice CS Custom Formatting Essentials 2 .... $20
❍ Achieving Efficiencies with GoFileRoom .... $40 $________

PRE-CONFERENCE WORKSHOPS—One half-day session $150
Two half-day sessions $250
Workshop Code(s) PRE AM ______ PRE PM ______ *(See page 12-13)* $________

FRIDAY NIGHT EVENT—Number of Adults ______ .... $75 *each*
Number of Children ______ .... $45 *each* $________

OPTIONAL SPOUSE/GUEST PROGRAM $135
Thursday , November 5 *(See page 8)*
Name ____________________ $________

PRE-CONFERENCE GOLF OUTING $85
Wednesday , November 4 *(See page 8)*
Name ____________________ $________

WELCOME RECEPTION FEE .... $30 $________
Per non-registered guests for the Wednesday Welcome Reception.

TOTAL AMOUNT DUE $________

WORKSHOPS

1. Refer to the workshop descriptions (pages 16-28) to select the workshops you want to attend.
2. Use the Workshop Schedule (pages 14-15) to view the classes by time slot.
3. Write in the session number of each class you choose next to the appropriate time slot below.

WORKSHOP SCHEDULE

Time Slot	Session Number
A	
B	
C	
D	
E	
F	
G	
H	

METHOD OF PAYMENT

❍ My check made payable to **Professional Software & Services** is enclosed.

Please charge my:

❍ MasterCard ❍ VISA ❍ AMEX ❍ Discover

Card Number: ____________________

Expiration date: ____________________

Name on card: ____________________

Cardholder's signature: ____________________

REFUNDS

A full refund will be issued if registration is cancelled on or before October 9, 2009.

HOTEL REGISTRATION & AIRFARE

Reservations and payment are handled directly by the Gaylord Palms Resort and Convention Center.
You can make reservations by phone, online, or by fax. For fax reservations, please photocopy this form and fax it with your credit card information.

Note: To avoid duplicate reservations, choose only ONE option when booking.

Online: CS.ThomsonReuters.com/UC (Please use this URL to take advantage of the special Thomson Reuters Users' Conference group rate.)

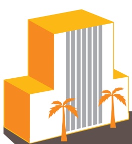
Phone: 407.586.2000 **Fax:** 407.584.2259

Name: ____________ Arrival Date: ____________ Departure Date: ____________

Address: ____________ City: ____________ State: ______ ZIP: ____________

Home Phone: ____________ Business Phone: ____________ Fax: ____________

Email Address: ____________



RESERVE YOUR ROOM AT THE GAYLORD PALMS RESORT BEFORE AUGUST 31, 2009
and you'll be entered into a drawing for one of these exciting prizes:

- **A four-night stay** in a Deluxe Luxury Suite during the Conference
- **An Apple® iPhone* $200 Gift Card**
- **A GPS Navigation System**
- **Apple® iPod Shuffle**
- **American Express® Gift Cards** valued at $100 and $50

** Apple is not a participant in or sponsor of this promotion.*

ROOM PREFERENCE | Please Select

❍ $206—Single/Double ❍ $246—Emerald Bay ❍ Accessibility Needs—Please Specify: ____________

PAYMENT INFORMATION | Please Provide Credit Card Information to Guarantee Your Reservation

Please charge my: ❍ Visa ❍ MasterCard ❍ AMEX ❍ Discover

Card Number: ____________ Expiration Date: ____________

Name on Card: ____________ Cardholder's Signature: ____________

GAYLORD PALMS RESORT AND CONVENTION CENTER ★ 6000 W OSCEOLA PARKWAY, KISSIMMEE, FL 34746

Enjoy world-class restaurants, dynamic on-site recreation, and breathtakingly beautiful gardens. The Gaylord Palms brings you the sights and sounds of sunny Florida—from the gently rising mists in the Everglades, to the funky and vibrant island revelry of Key West, to the Spanish-infused, old-world charm of St. Augustine. You'll never want to leave the resort!

MAKE YOUR RESERVATIONS NOW—VISIT US ONLINE | **CS.ThomsonReuters.com**

Click the Users' Conference link, then the Travel tab. You can also make a reservation by calling the Gaylord Palms Resort at 407.586.2000 and asking for the Thomson Reuters Users' Conference group rate.

- Reservation requests must be received by October 2, 2009 to qualify for the special conference room rate and to ensure room availability. Rooms are limited. Be sure to ask for the Thomson Reuters Users' Conference room block to obtain special room rates.
- Stay and explore the Orlando area! The Gaylord Palms is extending the special group rate for three days before and three days after the main program dates of November 4-7, 2009, based on availability.
- **Check-in time is 3:00 PM; check-out time is 12:00 Noon**.
- **Cancellation policy is 72 hours prior to scheduled arrival date**.

Thomson Reuters has made arrangements with American Express Travel Services to receive discounts with some airlines; booking your flights early will ensure the best fares. To take advantage of these special fares, print and complete the airfare registration form located on our website at CS.ThomsonReuters.com, and fax it to 402.697.5380, or you can call 877.882.8785 and press 5 to arrange your travel.

PRE-CONFERENCE WORKSHOPS

WORKSHOP SCHEDULE & PRICING

Pre-conference workshops take place on Wednesday, November 4. The cost is $150 for one half-day session or $250 for two half-day sessions (additional equipment costs are included).

Wednesday Morning
WORKSHOP SCHEDULE | 9:00 AM - Noon

- PRE AM1—UltraTax CS Individual
- PRE AM2—Trial Balance CS Essentials 1
- PRE AM3—UltraTax CS Office Tools
- PRE AM4—Practice CS Setup Essentials

Wednesday Afternoon
WORKSHOP SCHEDULE | 1:00 PM - 4:00 PM

- PRE PM1—UltraTax CS Corporations/Partnerships
- PRE PM2—Practice CS Project Management & Workflow
- PRE PM3—FileCabinet CS Essentials 1
- PRE PM4—Practice CS Processing Essentials

Please Note: The blue code (e.g. PRE AM1) represents the workshop number, which is needed for registration. Also, each half-day session is awarded 3 CPE credits.

MORNING WORKSHOP DESCRIPTIONS

UltraTax CS Individual

If you want to use UltraTax/1040 software with maximum proficiency, this advanced workshop is for you. We'll walk through the data entry options and features for advanced 1040 topics in UltraTax CS such as; using UltraTax CS Source Data entry, setting up 8615 data sharing, the data entry requirements for statutory employees, supplemental business expenses, and traditional IRA distributions. We'll also show data entry for ministers and cancellation of debt. Attendance requires a working knowledge of UltraTax CS and/or successful completion of the UltraTax/1040 Essentials 1 class. **Level: Advanced**

Hands-on Training

Instructor: Amber Stanifer, Thomson Reuters

Session: PRE AM1

Trial Balance CS Essentials 1

This workshop will focus on the setup and processing of year-end trial balance work in Trial Balance CS. We'll walk through the steps of importing a spreadsheet, creating grouping schedules and tickmarks, defining multiple balance types for adjusting, tax, and report purposes, posting adjustments, and generating reports. **Level: Basic**

Hands-on Training

Instructor: Francis Garcia, Thomson Reuters

Session: PRE AM2

UltraTax CS Office Tools *new*

If you haven't given yourself the time to investigate the Office Tools feature in UltraTax CS, then this workshop is for you! There is more to UltraTax CS then just entering data to complete a client's tax return. This workshop will introduce you to the UltraTax CS Office Tools and help you navigate the setup, log events, and run reports using the Client Status feature. We'll demonstrate how to run searches in Data Mining that produce reports, letters, emails and mailing labels. Attendance requires a working knowledge of UltraTax CS, as well as an understanding of how your firm currently tracks the progress of clients and the types of communications your firm delivers to your clients. **Level: Intermediate**

Hands-on Training

Instructor: Therese Witherow, Thomson Reuters

Session: PRE AM3

Practice CS Setup Essentials

Practice CS is a powerful and flexible tool that allows you to manage all the key details of your firm from one centralized location. This workshop will help you design and navigate the revolutionary digital dashboards to quickly access real-time information about your firm, as well as identify the setup of Practice CS at the system, firm, office, activities, client and staff levels. Join us and uncover the questions you need to answer in order to determine how to set up Practice CS to best suit your firm's needs! **Level: Basic**

Hands-on Training

Instructor: Mark Spencer, Thomson Reuters

Session: PRE AM4

AFTERNOON WORKSHOP DESCRIPTIONS

UltraTax CS Corporations/Partnerships

In this workshop we'll walk through the data entry options and features for advanced 1120/1065 topics in UltraTax CS such as; the integration with Write-Up CS, the data entry requirements for multi-state apportionment, federal and state tax accrual, and NOL information. We'll also show the data entry for the 1377 election, specially allocating amounts to specific partners, and electronically filing partnership returns. Attendance requires a working knowledge of UltraTax CS and/or successful completion of the UltraTax/1120 & 1065 Essentials 1 class. **Level: Advanced**

Hands-on Training

Instructor: Amber Stanifer, Thomson Reuters

Session: PRE PM1

Practice CS Project Management & Workflow *new*

Discover everything you need to effectively implement the Project Management module at your firm in this hands-on workshop. We'll cover a variety of topics including creating project templates, projects and tasks, updating projects, and duplicating projects. Plus, you'll learn how automated notifications can assist your staff with the routing and completion of any firm project. **Level: Intermediate**

Hands-on Training

Instructor: Pamela Butler, Thomson Reuters

Session: PRE PM2

FileCabinet CS Essentials 1

This comprehensive workshop, designed for new users of FileCabinet CS, will give you hands-on experience with implementing FileCabinet CS at the firm administrator and office staff levels. Learn how to set up FileCabinet CS to meet the needs of your firm through security, drawer setup and management, and by manipulating documents stored in FileCabinet CS. Discover how FileCabinet CS integrates with CS Professional Suite, Enterprise Suite, and other Windows-based applications. You'll also learn how to embed, scan, annotate documents, and how to deliver documents to clients.

Level: Basic

Hands-on Training

Instructor: Therese Witherow, Thomson Reuters

Session: PRE PM3

Practice CS Processing Essentials

Dig in and concentrate on the core processing areas of Practice CS: time and expense entry, billing, accounts receivable, and reporting. Designed to provide a complete time entry and billing walk-through, this workshop covers such topics as producing work-in-progress reports, creating bills, setting up billing defaults, and using different methods of billing to create invoices. Learn how to enter accounts receivable information and use the reporting system to generate useful client, employee, and firm reports. **Level: Basic**

Hands-on Training

Instructor: Mark Spencer, Thomson Reuters

Session: PRE PM4

WORKSHOP SCHEDULE

Hands-on Classes (columns 1–4)

				1	2	3	4	5	6	7
THURSDAY	A	10:00 - 11:40 am	100 min	UltraTax CS Setup Essentials new Hands-on (1 of 2) Witherow SK (p.19)	GoSystem Tax 1065 Essentials 1 new Hands-on Blake SK (p.20)	Practice CS Setup Essentials new Hands-on (1 of 2) Spencer SK (p.22)	Financial Analysis CS Essentials Hands-on (1 of 2) Garcia, F. SK (p.16)	Practice CS Custom Formatting Essentials 1 new Wright SK (p.22)	UltraTax CS: What's New new Coffield, Leicher SK (p.19)	Building a Culture of Firm Optimization new Kepczyk SK (p.25)
THURSDAY	B	1:20 - 3:00 pm	100 min	UltraTax CS Setup Essentials new Hands-on (2 of 2) Witherow SK (p.19)	GoSystem Tax 1065 Essentials 2 new Hands-on Stanifer SK (p.20)	Practice CS Setup Essentials new Hands-on (2 of 2) Spencer SK (p.22)	Financial Analysis CS Essentials Hands-on (2 of 2) Garcia, F. SK (p.16)	Practice CS Custom Formatting Essentials 1 new Wright SK (p.22)	UltraTax/1120 & 1065 Essentials 2 McCarty SK (p.19)	AICPA Top Technology Initiatives new Kepczyk SK (p.25)
THURSDAY	C	3:30 - 5:10 pm	100 min	Write-Up CS Financial Statement Formatting Essentials 2 Hands-on (1 of 2) French SK (p.16)	Accountant's Assistant Import from Quickbooks Pro Hands-on (1 of 2) Teeple SK (p.18)	Practice CS Project Management & Workflow Hands-on (1 of 2) Sanford SK (p.21)	Payroll Essentials 2 Hands-on (1 of 2) Hubbard SK (p.16)	UltraTax/1040 Essentials 2 Stanifer SK (p.18)	UltraTax CS: What's New new Coffield, Leicher SK (p.19)	GoSystem Tax 1120 Essentials 2 new Godbee SK (p.20)
FRIDAY	D	9:10 - 10:00 am	50 min	Write-Up CS Financial Statement Formatting Essentials 2 Hands-on (2 of 2) French SK (p.16)	Accountant's Assistant Import from Quickbooks Pro Hands-on (2 of 2) Teeple SK (p.18)	Practice CS Project Management & Workflow Hands-on (2 of 2) Sanford SK (p.21)	Payroll Essentials 2 Hands-on (2 of 2) Hubbard SK (p.16)	Social Networking 101 new Hoeft SK (p.26)	Getting Even More Out of UltraTax CS! Godbee SK (p.18)	GoSystem Tax: What's New new Witherow SK (p.20)
FRIDAY	E	10:30 - 12:10 pm	100 min	Write-Up CS General Ledger Essentials 2 Hands-on (1 of 2) Garcia, L. SK (p.16)	Client Bookkeeping Solution Accounts Payable/Accounts Receivable Essentials Hands-on (1 of 2) French SK (p.18)	Practice CS Processing Essentials Hands-on (1 of 2) Sanford SK (p.21)	Practice CS Custom Formatting Essentials 2 new Hands-on Wright SK (p.22)	UltraTax/1040 Essentials 2 Stanifer SK (p.18)	UltraTax CS: What's New new Coffield, Leicher SK (p.19)	GoSystem Tax State & Local Tax Processing new Blake SK (p.20)
FRIDAY	F	1:30 - 3:10 pm	100 min	Write-Up CS General Ledger Essentials 2 Hands-on (2 of 2) Garcia, L. SK (p.16)	Client Bookkeeping Solution Accounts Payable/Accounts Receivable Essentials Hands-on (2 of 2) French SK (p.18)	Practice CS Processing Essentials Hands-on (2 of 2) Sanford SK (p.21)	Practice CS Custom Formatting Essentials 2 new Hands-on Wright SK (p.22)	UltraTax/1120 & 1065 Essentials 2 McCarty SK (p.19)	Introduction to Next Generation Payroll Products new Knapp SK (p.17)	GoSystem Tax Tools new Blake SK (p.20)
FRIDAY	G	3:40 - 5:20 pm	100 min	Productivity Tips for Fast Bank Reconciliations Hands-on (1 of 2) Garcia, L. SK (p.17)	Accountant's Assistant Import from Quickbooks Pro Hands-on (1 of 2) Teeple SK (p.18)	Achieving Efficiencies with GoFileRoom new Hands-on (1 of 2) John SK (p.23)	Payroll Year-end Skills Hands-on (1 of 2) Hubbard SK (p.16)	FileCabinet CS: Tips for Managing Your Paperless Workflow Kellerhals SK (p.23)	Introduction to Accounting CS new Knapp SK (p.17)	GoSystem Tax Electronic Filing Essentials new Stanifer SK (p.21)
SATURDAY	H	8:30 - 9:20 am	50 min	Productivity Tips for Fast Bank Reconciliations Hands-on (2 of 2) Garcia, L. SK (p.17)	Accountant's Assistant Import from Quickbooks Pro Hands-on (2 of 2) Teeple SK (p.18)	Achieving Efficiencies with GoFileRoom new Hands-on (2 of 2) John SK (p.23)	Payroll Year-end Skills Hands-on (2 of 2) Hubbard SK (p.16)	Social Networking 101 new Hoeft SK (p.26)	Getting Even More Out of UltraTax CS! Godbee SK (p.18)	GoSystem Tax: What's New new Witherow SK (p.20)

** An additional fee is charged for each hands-on course to help defray the cost of additional computer equipment. Two participants will be assigned to each computer.*

CPE Field of Study Key:

- SK Specialized Knowledge
- T Taxation
- MGT Management

Session number	1
Session title	UltraTax CS Setup Essentials
Workshop is NEW this year	new
Hands-on class	Hands-on
More than one session is required to complete workshop	(1 of 2)
Sessions that are part of one workshop are similarly shaded	
Instructor	Witherow
Page where workshop is described	(p.x)
CPE field of study	XX

8	9	10	11	12	13	14	15
Small Business Server 2008 *new* Goodfellow (p.25) SK	Practice CS: What's New *new* Jagst (p.21) SK	Strategic Technology Planning & Budgeting *new* James (p.25) SK	Engagement CS for Tax Workflow *new* Wood (p.17) SK	How to Build a Write-up & Payroll Practice Manning (p.26) MGT	FileCabinet CS: Tips for Managing Your Paperless Workflow Kellerhals (p.23) SK	NetClient CS: What's New *new* Guthrie (p.22) SK	Next Generation Accounting Firm Root (p.27) MGT
UltraTax CS Electronic Filing - Taking it to the Next Level Godbee (p.19) SK	What's "Cool" in Technology These Days Courtney (p.24) SK	The Paperless Office: Managing It Now Carmines (p.24) SK	GoFileRoom: What's New *new* Howard (p.23) SK	Acquiring/Selling a Tax & Write-up Practice Manning (p.26) MGT	Introduction to Next Generation Payroll Products *new* Knapp (p.17) SK	Protect Your Business from Fraud & Identity Theft Bourdeaux (p.27) MGT	Engagement CS from a Practitioner's Perspective Anderson (p.17) SK
Windows 7 *new* Goodfellow (p.25) SK	Practice CS Staff Management Essentials *new* Butler (p.22) SK	Value Pricing - Why It Works *new* Lawhorn (p.28) MGT	Scanning Efficiencies & Best Practices *new* Howard (p.24) SK	Paperless Payroll for the Tech Savvy Firm McCowan (p.24) SK	Introduction to Accounting CS *new* Knapp (p.17) SK	Engagement CS for the Field Essentials Garcia, F. (p.16) SK	Adding Financial & Payroll Services Panel *new* LaFollette (p.28) MGT
Improving Productivity with Practice CS Spencer (p.21) SK	Time Management Best Practices *new* Beattie (p.27) MGT	Microsoft Excel Courtney (p.27) MGT	Optimizing Software Integration within the CS Professional Suite & Beyond *new* Mansfield (p.26) SK	Thomson Reuters Web Services for the Tech Savvy Firm McCowan (p.24) SK	From CES to You *new* LaFollette (p.24) SK	Experience the Competitive Edge with Checkpoint Hernandez (p.27) MGT	UltraTax CS Client Documents: Boot Camp for the "Print If" Function *new* Leuthner (p.28) MGT
UltraTax CS Electronic Filing - Taking it to the Next Level Godbee (p.19) SK	Fixed Assets CS Essentials McCarty (p.19) SK	FileCabinet CS Essentials for the Office Staff *new* Kellerhals (p.23) SK	A Technical Consultant's Perspective on Paperless Audit Solutions *new* Tankersley (p.28) MGT	Engagement CS from a Practitioner's Perspective Anderson (p.17) SK	Individual Tax Update *new* Harden (p.26) T	Virtual Office CS Best Practices *new* Guthrie (p.22) SK	Practice CS Implentation Panel Jagst (p.21) SK
Taking Your 1040 Practice to the Web Kellerhals (p.18) SK	Practice CS: What's New *new* Jagst (p.21) SK	The Paperless Office: Managing It Now Carmines (p.24) SK	A Technical Consultant's View of Tips & Tools for Successfully Managing Paperless Engagements *new* Tankersley (p.28) MGT	GoFileRoom Firmflow *new* John (p.23) SK	Business Tax Update *new* Harden (p.26) T	Value Pricing - Why It Works *new* Lawhorn (p.28) MGT	Adding Financial & Payroll Services Panel *new* LaFollette (p.28) MGT
Productivity Tools: Planner CS & Toolbox CS Meyer (p.19) SK	Practice CS Staff Management Essentials *new* Butler (p.22) SK	Security Concerns for Today's CPA Firm *new* James (p.25) SK	Engagement CS for Accounting & Audit Workflow *new* Wood (p.18) SK	Scanning Efficiencies & Best Practices *new* Howard (p.24) SK	What's "Cool" in Technology These Days Courtney (p.24) SK	Maximizing Performance of the CS Professional Suite on Your Network Guthrie (p.24) SK	Next Generation Accounting Firm Root (p.27) MGT
Improving Productivity with Practice CS Spencer (p.21) SK	UltraTax CS Source Data Entry & OCR Processing *new* McCarty (p.20) SK	Getting Even More out of Outlook 07 *new* Beattie (p.28) MGT	Optimizing Software Integration within the CS Professional Suite & Beyond *new* Mansfield (p.26) SK	Thinking About a Move to Virtual Office CS? *new* McCowan (p.22) SK	Disaster Preparedness *new* Bourdeaux (p.27) MGT	Experience the Competitive Edge with Checkpoint Hernandez (p.27) SK	UltraTax CS Client Documents: Boot Camp for the "Print If" Function *new* Leuthner (p.28) MGT

CONFERENCE WORKSHOPS

PRODUCTS & SERVICES: WORKSHOP DESCRIPTIONS

ACCOUNTING

Write-Up CS General Ledger Essentials 2

This workshop will demonstrate the powerful, advanced features of Write-Up CS. You'll learn how to make use of impressive, timesaving features such as recurring templates, automatic journal entries, integration with UltraTax CS and Fixed Assets CS, consolidating clients, year-end closing, and more. Attendance requires a working knowledge of Write-Up CS. **Level: Advanced**

Hands-on Training

Instructor: Lisa Garcia, Thomson Reuters

Session: E1 & F1

Write-Up CS Financial Statement Formatting Essentials 2

Take your financial statement preparation to the next level with this hands-on workshop. Add value to the services you currently provide to your clients by learning the advanced capabilities of the Write-Up CS Financial Reporter module. You'll create departmental and location-based income statements, cash flow statements, ratios, graphs, memo accounts, and more. This is an advanced class; attendance requires a general understanding of the Financial Reporter module.

Level: Advanced

Hands-on Training

Instructor: Leah French, Thomson Reuters

Session: C1 & D1

Financial Analysis CS Essentials

This workshop will introduce you to Financial Analysis CS, focusing on important setup concepts that will enhance your use of the software. Learn how to provide your clients with valuable financial statement comparisons and benchmark them among similar clients within your own database or to an industry standard. You'll transfer client data from Write-Up CS and/or Trial Balance CS, set up comparison criteria, assign client peers, create formulas, and design reports. In addition, we'll cover use of industry data including retrieval from the Data Exchange module of Financial Analysis CS and Risk Management Association (RMA) Annual Statement Studies®. **Level: Basic**

Hands-on Training

Instructor: Francis Garcia, Thomson Reuters

Session: A4 & B4

Payroll Essentials 2

This in-depth workshop will take you through a number of important payroll processing topics within Payroll CS and the Write-Up CS Payroll Compliance module. You'll discover—and get a thorough understanding of—the methods for becoming a 940/941 electronic filer. We'll also cover how to set up multi-state employees, automatic vendor checks, tipped employees, accruable benefits, form printing fees, and more.

Level: Advanced

Hands-on Training

Instructor: Jessica Hubbard, Thomson Reuters

Session: C4 & D4

Payroll Year-end Skills

Especially for users of Payroll CS and the Write-Up CS Payroll Compliance module, this workshop will give you timesaving tips and tricks to maximize your efficiency when processing payroll forms at year-end. We'll learn how to verify accurate year-to-date totals, and how to process W-2, 1099, and 944 forms as both a paper and an electronic filer. You'll also discover how to import information to process your forms, close your payroll year, and update your tax tables for the new payroll year. **Level: Intermediate**

Hands-on Training

Instructor: Jessica Hubbard, Thomson Reuters

Session: G4 & H4

Engagement CS for the Field Essentials

Learn how to put the power of Engagement CS to work for you in the field. This workshop will discuss important concepts and terminology, and give you practical examples of when and how to use the Check-in/Check-out process or Multi-staff functionality to ensure complete and accurate engagements. Attendance requires a working knowledge of Engagement CS or completion of the Engagement CS Setup Essentials class. **Level: Intermediate**

Lecture

Instructor: Francis Garcia, Thomson Reuters

Session: C14

Engagement CS from a Practitioner's Perspective

In this course, we will be examining how Engagement CS can be used by a practitioner for completing client engagements. We will look at not only how to use Engagement CS as an audit tool, but we will also examine using Engagement CS for compilation work, corporate tax engagements, and general work for clients. In addition, we will focus on using the formula creation process in Engagement CS to create spreadsheets which calculate work paper results and self-check to the trial balance. We will examine how these tools can be used to enhance firm engagement productivity. Upon completing this course, each practitioner will understand the power of this tool and how it will make your firm more profitable. **Level: Intermediate**

Lecture

Instructor: John D. Anderson, CPA.CITP, CIA, MCP, MSA, Weidmayer, Schneider, Raham & Bennett, P.C.

Session: B15 or E12

Productivity Tips for Fast Bank Reconciliations

This hands-on workshop has been enhanced for Write-Up CS users who want to take full advantage of the bank reconciliation capabilities of the CS Professional Suite Accounting Products. We'll take you through the checkbook balancing process from start to finish, including important troubleshooting steps. Those who are new to bank reconciliation will benefit from must-know basics like setup, clearing transactions, and how to transfer funds from one bank to another. Experienced users will have the opportunity to try timesaving features such as the electronic bank statement import and quarterly reconciliations. Reach a ZERO un-reconciled amount as efficiently and quickly as possible! **Level: Intermediate**

Hands-on Training

Instructor: Lisa Garcia, Thomson Reuters

Session: G1 & H1

Introduction to Next-Generation Payroll Products *new*

With new features added to Service Bureau Payroll CS and the introduction of the new payroll module within Accounting CS, you now have even more options for next-generation payroll software in the CS Professional Suite. Come and see what we've added in the past year to Service Bureau Payroll CS. We will look at new features, including the custom layout and report designers, employee web access, real-time client access via NetClient CS, historical check entry, task automation, event tracking, the ability to file payroll tax forms for local municipalities, and more. In addition, we'll introduce the recently released payroll module of Accounting CS, discuss differences between the two payroll products, and lay out our vision and strategy for next-generation payroll software going forward. **Level: Overview**

Lecture

Instructor: Kathie Knapp, Thomson Reuters

Session: B13 or F6

Introduction to Accounting CS *new*

Come check out the recently released next-generation accounting software—Accounting CS—the newest addition to the CS Professional Suite. We'll show you some of the many features available in the new program, including client and chart of accounts setup, transaction entry, bank account reconciliation, financial statements, custom reporting, and more. We'll discuss methods to smoothly transition to Accounting CS from Creative Solutions Accounting (CSA) and look at the existing integration with CSA and Client Bookkeeping Solution. We will also cover the new features you can expect to see from Accounting CS in the coming year. **Level: Overview**

Lecture

Instructor: Kathie Knapp, Thomson Reuters

Session: C13 or G6

Engagement CS for Tax Workflow *new*

Today's firms are seeking innovative ways to manage their tax workflow. Engagement CS can help improve the efficiency and effectiveness of your ongoing business process. Workpapers, research, and reports can all be managed consistently, allowing you to increase quality control. Engagement templates can be built out by entity and industry type. We'll show you how to do the work once and then copy it across applicable client jobs. You'll see how to easily reallocate work across available resources by transferring engagements electronically. Business client trial balances can be exported to your tax software, minimizing duplication of efforts. Come and see how Engagement CS can streamline your workflow processes and help you make your tax practice more efficient than ever. **Level: Basic**

Lecture

Instructor: Brian Wood, Thomson Reuters

Session: A11

CONFERENCE WORKSHOPS

PRODUCTS & SERVICES: WORKSHOP DESCRIPTIONS

ACCOUNTING

Engagement CS for Accounting & Audit Workflow *new*

Paperless workflow tools aren't just for audits anymore! Compilations, Reviews, Business Valuation Services—these work products can all be managed using the power of Engagement CS. Maximize the capabilities of your practice by putting the value of Engagement CS to work for you. Client data, engagement workpapers, review and wrap-up are streamlined using our innovative workflow product. Reports and diagnostics allow you to see exactly how each job is progressing. Build out template engagements by service type or client type—templates that can be copied across jobs, minimizing duplication of efforts. Let us show you the power and value of Engagement CS as your workflow tool for all your accounting and audit needs. **Level: Basic**

Lecture

Instructor: Brian Wood, Thomson Reuters

Session: G11

CLIENT ACCOUNTING

Client Bookkeeping Solution Accounts Payable/Accounts Receivable Essentials

This hands-on workshop introduces the Accounts Payable and Accounts Receivable modules of Client Bookkeeping Solution (CBS). Learn how to use these modules to enter data, implement discounts, print checks, enter credit memos, apply payments, assess finance charges, record deposits, and track customer balances. Even experienced users of these modules will learn tips and tactics to save your clients time when performing data entry or printing, and when making corrections on payables and receivables. **Level: Basic**

Hands-on Training

Instructor: Leah French, Thomson Reuters

Session: E2 & F2

Accountant's Assistant Import from Quickbooks® Pro

This workshop introduces the QuickBooks Pro import capabilities of the Write-Up CS Accountant's Assistant module. Learn step-by-step procedures for preparing the client data in Write-Up CS, performing the QuickBooks Pro import, and making modifications to transferred data in Write-Up CS. Attendance requires a working knowledge of the Write-Up CS General Ledger module. **Level: Intermediate**

Hands-on Training

Instructor: Jeremy Teeple, Thomson Reuters

Session: C2 & D2 or G2 & H2

TAX

Getting Even More Out of UltraTax CS

This workshop will show you how to effectively employ key features in UltraTax CS to maximize productivity and efficiency in your office. We'll examine the client home page, various menu options to assist with tax prep, an assortment of on-screen review tools, the powerful client status system, adjusting the data entry display, and much more.

Level: Intermediate

Lecture (50 minutes)

Instructor: Denise Godbee, Thomson Reuters

Session: D6 or H6

UltraTax/1040 Essentials 2

Are you ready to learn about the advanced processing tasks of the UltraTax/1040 system? Then join us for this workshop, where we'll go beyond the basics to examine the powerful UltraTax CS features and capabilities that help you make the most of your software for maximum efficiency. We'll discuss a variety of topics including using UltraTax CS Source Data entry, setting up 8615 data sharing, data entry requirements for statutory employees, supplemental business expenses, and traditional IRA distributions. We will also show the data entry for ministers and cancellation of debt. **Level: Advanced**

Lecture

Instructor: Amber Stanifer, Thomson Reuters

Session: C5 or E5

Taking Your 1040 Practice to the Web

Learn how to use the web to offer your clients advanced online tax preparation and tax delivery services. In this workshop, you'll see from the accountant's point of view how portal technology makes it simple and efficient to deliver your client's organizer to a secure portal. Next, we'll take the client's perspective as we see how effortless it is to retrieve and enter tax information. We'll continue our role playing as you learn how to retrieve organizers, work papers, and source documents from your client to complete the tax return, and then post the finished return to the portal for your client to access. **Level: Intermediate**

Lecture

Instructor: Christina Kellerhals, Thomson Reuters

Session: F8

UltraTax/1120 & 1065 Essentials 2

Go beyond the basics in this workshop, where you'll receive in-depth instruction on the UltraTax/1120, 1120S and 1065 systems and examine data entry procedures and the resulting forms. You'll also learn about a variety of topics such as, the integration with Write-Up CS, analyzing Schedule L/M-1/M-2 calculations, data entry requirements for multi-state apportionment, and net operating loss information. We'll also show the data entry for specially allocating amounts to specific partners, data sharing Schedule K-1s, and electronically filing partnership returns.

Level: Advanced

Lecture

Instructor: Amy McCarty, Thomson Reuters

Session: B6 or F5

UltraTax CS: What's New *new*

Get a jump on next tax season! Join us for an advance preview of several new and powerful system-wide and entity-specific features that will be incorporated into this year's UltraTax CS products. This workshop will introduce and demonstrate the new enhancements so experienced users will be ready to quickly and easily begin processing 2009 tax returns. Some of the new features we'll cover include Puerto Rico PPT (1120 and 1065) and Puerto Rico Municipalities, using FileCabinet CS to identify and simultaneously print stored tax source documents when printing tax returns to the 1040 Portal, and much more.

Level: Overview

Lecture

Instructor: Fred Leicher and Tracy Coffield, Thomson Reuters

Session: A6 or C6 or E6

Fixed Assets CS Essentials

Learn how to take advantage of cutting-edge features in your asset management program. We'll examine the template client and show you how to save you time by efficiently setting up groups and locations for new clients. You'll also explore how the system handles short years and trades, and learn to import asset data from a Microsoft Excel spreadsheet. **Level: Basic**

Lecture

Instructor: Amy McCarty, Thomson Reuters

Session: E9

UltraTax CS Electronic Filing—Taking it to the Next Level

If your firm has a high volume of e-filed returns, this workshop will help take your e-filing with UltraTax CS to the next level of efficiency. You'll discover timesaving features and e-filing shortcuts across all entities in UltraTax CS, and learn to streamline e-filing processes. The processes you learn in this session will go a long way toward helping you grow the e-filing arm of your practice! **Level: Intermediate**

Lecture

Instructor: Denise Godbee, Thomson Reuters

Session: B8 or E8

Productivity Tools: Planner CS & ToolBox CS

Are you taking full advantage of the many powerful features in Planner CS and ToolBox CS? Find out in this comprehensive workshop. We'll examine the import of an existing 1040 client from UltraTax CS into Planner CS, and you'll see how report templates can help you analyze complex tax implications and construct a professional presentation that communicates various alternatives to your clients. Then we'll use ToolBox CS to explore how to use key utilities, including tax and financial calculators, and IRS flowcharts, to quickly determine whether a client qualifies for a particular tax credit. **Level: Basic**

Lecture

Instructor: Zac Meyer, Thomson Reuters

Session: G8

UltraTax CS Setup Essentials *new*

Learn how to set up UltraTax CS to make it work most efficiently for your firm. In this workshop, we will demonstrate the setup options available within UltraTax CS such as, general product setup, the options available under System Configuration and User Preferences, setup required for CS Connect and client communications, as well as using the Client Status and Help features. **Level: Basic**

Hands-on Training

Instructor: Therese Witherow, Thomson Reuters

Session: A1 & B1

CONFERENCE WORKSHOPS

PRODUCTS & SERVICES: WORKSHOP DESCRIPTIONS

TAX

UltraTax CS: Source Data Entry & OCR Processing new

Learn how fast tax processing can be when you take advantage of the UltraTax CS Source Data Entry module and Optical Character Recognition (OCR) technology. In this workshop, you'll see how UltraTax CS Source Data Entry makes it easy for your staff to input source document information on facsimile versions of the W-2, 1099-INT, and other source documents without having to directly access UltraTax CS. We'll look at the process to export the data to UltraTax CS and accept it into your 1040 client data files via the data sharing feature. In addition, we'll look at how to speed up the process even more with the use of OCR technology. By transmitting scanned tax source documents to the Thomson Reuters Data Center for processing and data extraction, you can use the UltraTax CS Source Data Entry program to export the data directly into UltraTax CS.

Level: Intermediate

Lecture (50 minutes)

Instructor: Amy McCarty, Thomson Reuters

Session: H9

GoSystem Tax 1065 Essentials 1 new

Designed for new users of the GoSystem Tax 1065 application, this workshop will give you experience navigating the Organizer and Tax Form screens of the return while preparing a basic 1065 client from start to finish. We'll cover various 1065 data entry topics including, partner data, rental real estate and depreciation, Schedule K, balance sheet and reconciliation, and special allocations for the partnership. **Level: Basic**

Hands-on Training

Instructor: Sherry Blake, Thomson Reuters

Session: A2

GoSystem Tax 1065 Essentials 2 new

Join us for this workshop to learn about the advanced processing tasks of the GoSystem Tax 1065 system. We'll go beyond the basics to explore data entry procedures and the resulting output on the form. We'll also discuss a variety of topics including importing partner information and special allocations, entering transfers of interest, 754 elections, and Schedule M-3. **Level: Advanced**

Hands-on Training

Instructor: Amber Stanifer, Thomson Reuters

Session: B2

GoSystem Tax 1120 Essentials 2 new

In this workshop, you'll learn about the advanced processing capabilities of the GoSystem Tax 1120 system where we'll delve deeper into data entry procedures and the resulting output on the form. We'll discuss a variety of topics including importing Trial Balance, Schedule M-3, Schedule O, allocation & apportionment, share transfers, and consolidating returns. **Level: Advanced**

Lecture

Instructor: Denise Godbee, Thomson Reuters

Session: C7

GoSystem Tax State & Local Tax Processing new

This workshop will focus on areas of GoSystem Tax that assist in the state preparation process. We will examine the data entry for the Common State, Allocation & Apportionment, and Individual State folders. We'll also look at the preparation of a multistate consolidation return. **Level: Intermediate**

Lecture

Instructor: Sherry Blake, Thomson Reuters

Session: E7

GoSystem Tax Tools new

There is more to GoSystem Tax than just entering data to complete a client's tax return. This workshop will focus on the tools surrounding the core tax application of GoSystem Tax. Demonstrations will include how to set Tax Defaults and Milestones, and run a variety of reports. You'll also learn how to perform processes that include importing/exporting of demographic and financial data, review tools, and running queries through FormSource. If you haven't given yourself the time to investigate these tools in GoSystem Tax, then this class is for you!

Level: Intermediate

Lecture

Instructor: Sherry Blake, Thomson Reuters

Session: F7

GoSystem Tax: What's New new

Get a jump on next tax season! Join us for a discussion on several new and powerful system-wide and entity-specific features that will be incorporated into this year's GoSystem Tax program. This workshop will introduce the new program enhancements so that experienced users will be ready to quickly and easily begin processing 2009 tax returns.

Level: Overview

Lecture (50 minutes)

Instructor: Therese Witherow, Thomson Reuters

Session: D7 or H7

GoSystem Tax Electronic Filing Essentials *new*

If your firm has a high volume of e-filed returns, this workshop will help your staff understand the process for electronically filing both Individual and Business (XML) returns. In this workshop we'll demonstrate how to enable the return for electronic filing, sign the electronic return and enter direct deposit or debit information. You'll learn how to validate the electronic file and review the electronic filing diagnostics, create and transmit the electronic return, and how to view the status of the return.

Level: Intermediate

Lecture

Instructor: Amber Stanifer, Thomson Reuters

Session: G7

PRACTICE MANAGEMENT

Practice CS Project Management & Workflow

Discover everything you need to effectively implement the Project Management module at your firm in this hands-on workshop. We'll cover a variety of topics including creating project templates, projects and tasks, updating projects, and duplicating projects, plus learn how automated notifications can assist your staff with the routing and completion of any firm project. **Level: Intermediate**

Hands-on Training

Instructor: Gregg Sanford, Thomson Reuters

Session: C3 & D3

Practice CS Processing Essentials

Dig in and concentrate on the core processing areas of Practice CS, including time and expense entry, billing, accounts receivable, and reporting. Designed to provide a complete time entry and billing walk-through, this workshop covers such topics as producing work-in-progress reports, creating bills, setting up billing defaults, and using different methods of billing to create invoices. Learn how to enter accounts receivable information and use the reporting system to generate useful client, employee, and firm reports. **Level: Intermediate**

Hands-on Training

Instructor: Gregg Sanford, Thomson Reuters

Session: E3 & F3

Improving Productivity with Practice CS

If you're still thinking of Practice CS primarily as a time and billing program, this class will open your eyes to the many ways you can use Practice CS as a tool to manage and improve productivity within your firm. Discover how to centralize your firm's information using Practice CS as your "one stop shop" You'll learn tips and tricks to use Practice CS to its fullest potential. **Level: Intermediate**

Lecture (50 minutes)

Instructor: Mark Spencer, Thomson Reuters

Session: D8 or H8

Practice CS: What's New *new*

This workshop will introduce the new features included in recent releases of Practice CS. The focus will be on powerful enhancements made throughout the system, including in-depth details of the recently released Staff Management module. You'll also be introduced to many of the latest enhancements available in Practice CS—and get a sneak preview of other exciting upcoming enhancements. **Level: Overview**

Lecture

Instructor: Matt Jagst, Thomson Reuters

Session: A9 or F9

Practice CS Implementation Panel

Join us for an engaging, free-flowing panel discussion on implementing Practice CS. A panel of current Practice CS users will discuss how they implemented Practice CS in their own firms. Topics to be covered include timing of implementation, conversion, training, common pitfalls, and much more. If you're looking at implementing Practice CS in your firm and would like to hear from your peers who have successfully managed the process, please join us for this fast-paced session.

Level: Overview

Panel

Moderator: Matt Jagst, Thomson Reuters

Panelists: TBD

Session: E15

CONFERENCE WORKSHOPS

PRODUCTS & SERVICES: WORKSHOP DESCRIPTIONS

PRACTICE MANAGEMENT

Practice CS Setup Essentials *new*

Practice CS is a powerful, flexible tool that allows you to manage and produce results to grow your firm. This hands-on workshop will help you design and navigate the revolutionary digital dashboards to quickly access real-time information about your firm, as well as identify the setup of Practice CS at the system, firm, office, activities, client and staff levels. Join us and uncover the questions you need to answer in order to determine how to set up Practice CS to best suit your firm's needs.

Level: Basic

Hands-on Training

Instructor: Mark Spencer, Thomson Reuters

Session: A3 & B3

Practice CS Custom Formatting Essentials 1 *new*

Attend this workshop and become familiar with custom formatting and create custom invoices and letters. After this course you'll be able to identify design concepts of custom formats, discover the Practice CS Library, identify useful formatting tools, and create custom invoices and letters from existing templates. **Level: Basic**

Lecture

Instructor: Brian Wright, Thomson Reuters

Session: A5 or B5

Practice CS Custom Formatting Essentials 2 *new*

Discover advanced features in Custom Formats and create custom reports. After this hands-on course you'll be able to identify design concepts of custom formats, distinguish between If Expressions and Print When Formulas. Recognize when properties are to be used in formulas, and apply system formulas. Prerequisites: Practice CS Custom Formatting Essentials 1 or a general understanding of Practice CS Setup and Custom Formats. **Level: Advanced**

Hands-on Training

Instructor: Brian Wright, Thomson Reuters

Session: E4 or F4

Practice CS Staff Management Essentials *new*

In this workshop, we'll demonstrate how you can use the new Staff Management module in Practice CS to manage the vacation schedules, track benefits and monitor the workload of your staff. This is a must-attend workshop at this year's conference—attend and see how your firm can benefit from this powerful new module that gives you an ongoing snapshot of staff performance. **Level: Basic**

Lecture

Instructor: Pamela Butler, Thomson Reuters

Session: C9 or G9

WEB SERVICES

Virtual Office CS Best Practices *new*

Virtual Office CS lets you take advantage of advanced Application Service Provider (ASP) technology to maximize your online experience, any time, day or night. In this workshop, we'll look at how Virtual Office CS makes it easy for you and your staff to access statements, records, and other CS Professional Suite and Microsoft® Office® data. You'll learn best practices to ensure optimal performance including getting the most from your Internet connection, specific tips for individual CS Professional Suite and Microsoft Office applications, and managing your data and space usage in Virtual Office CS. **Level: Intermediate**

Lecture

Instructor: Chris Guthrie, Thomson Reuters

Session: E14

Thinking About a Move to Virtual Office CS? *new*

So you are thinking about a move to VO? Smart decision! What is VO, you say? Virtual Office CS (VO) offers web hosting of your CS Professional Suite and Enterprise Suite applications for convenient, online access. This exciting technology will give you and your firm freedom from the complex and mundane constraints of your current technology processes. VO is not the future, it is the now. Come and listen to one tech-savvy firm discuss how it successfully implemented VO five years ago and the decision processes that took place.

Level: Overview

Lecture (50 minutes)

Instructor: Ryan McCowan, CPA.CITP, Greene & McCowan, CPAs

Session: H12

NetClient CS: What's New *new*

Join us for a session that will show you how portal technology enables you to offer your clients advanced online services and secure access to their information whenever they need it. We'll guide you through the types of online services you can offer your clients, including file exchange, remote payroll data entry, document presentation, and more. We'll also demonstrate various NetClient CS modules so you can learn some additional tips and shortcuts. You'll see how easy it is to enhance your relationships by introducing advanced portal technology into your practice with no technical experience! **Level: Overview**

Lecture

Instructor: Chris Guthrie, Thomson Reuters

Session: A14

DOCUMENT MANAGEMENT

FileCabinet CS Essentials for the Office Staff *new*

This workshop will walk you through the procedures necessary to begin using FileCabinet CS in your office. We'll navigate the structure of FileCabinet CS and learn how to set up the program to meet the needs of your firm through security, data locations, document folders, and drawer setup. We'll also demonstrate the integration with CS Professional Suite products and other Windows-based applications and go over printing, scanning, and embedding documents as well as document delivery methods. **Level: Basic**

Lecture

Instructor: Christina Kellerhals, Thomson Reuters

Session: E10

FileCabinet CS: Tips for Managing Your Paperless Workflow

If you use FileCabinet CS for paperless processing, or if you'd simply like to learn tips for making your paperless office more efficient, then this is the class for you! In this workshop, we'll explore common FileCabinet CS tips and processes and give you the opportunity to share your experiences. We invite you to bring your questions about using FileCabinet CS in your practice. A working knowledge of FileCabinet CS and the way the program is being used in your office is recommended.

Level: Advanced

Lecture

Instructor: Christina Kellerhals, Thomson Reuters

Session: A13 or G5

GoFileRoom: What's New *new*

Get a jump start on next tax season! Join us for a review of several new and powerful system-wide features that will be incorporated into this year's GoFileRoom release. Some new features include enhancements to Control Panel, Quick Launch, RecordsFlow capabilities, new and enhanced integration with the CS Professional Suite, and much more. You'll also get a sneak peek at the newest features planned for the upcoming release of GoFileRoom and FirmFlow. **Level: Overview**

Lecture

Instructor: Scott Howard, Thomson Reuters

Session: B11

Achieving Efficiencies with GoFileRoom *new*

This comprehensive workshop, designed for new users of GoFileRoom, will give you a hands-on experience with using GoFileRoom for your everyday work. Learn efficient methods for adding a variety documents to GoFileRoom, explore advanced document search techniques, and also discover ways to effectively work with documents within GoFileRoom—copying, editing, online review and much more.

Level: Intermediate

Hands-on Training

Instructor: Sara John, Thomson Reuters

Session: G3 & H3

GoFileRoom: FirmFlow *new*

This comprehensive workshop, designed for new users of FirmFlow will give you hands-on experience using FirmFlow for project management and due date monitoring. Learn how to manage your everyday workload, efficiently use different tabs within project folders such as notes, deliverables, checklists, document access, and how to run customized FirmFlow reports to track real time data.

Level: Intermediate

Lecture

Instructor: Sara John, Thomson Reuters

Session: F12

CONFERENCE WORKSHOPS

PROFESSIONAL TOPICS: WORKSHOP DESCRIPTIONS

TECHNOLOGY

Thomson Reuters Web Services for the Tech-Savvy Firm

Web Services such as NetClient CS, Virtual Office CS, and Checkpoint are becoming basic technologies for many firms today. Firms that take advantage of these services are seeing improved efficiencies, greater productivity, and stronger client relationships. Discover how one tech-savvy firm uses these technologies. You'll learn how to roll these services out to your clients and your firm, and how to train your clients and your staff efficiently. Whether you're considering these technologies for the first time or have been using them all along, this workshop is a must. **Level: Intermediate**

Lecture (50 minutes)

Instructor: Ryan McCowan, CPA.CITP, Greene & McCowan, CPAs

Session: D12

Paperless Payroll for the Tech-Savvy Firm

The paperless payroll concept has been around for some time, but the question is still often asked: "What is paperless payroll, and how does it work?" Join us to see how one tech-savvy firm is taking this concept and making it work effectively and profitably. You'll learn about the technologies and processes to create an efficient paperless payroll from time clock to paycheck, and you'll see real-life examples of the processes—and challenges—of convincing your clients and staff of the benefits of paperless payroll. **Level: Intermediate**

Lecture

Instructor: Ryan McCowan, CPA.CITP, Greene & McCowan, CPAs

Session: C12

The Paperless Office: Managing It Now

Are you ready for the paperless office? This workshop will explore your commitment to the paperless office, and help you learn to manage it most effectively. We'll discuss the decisions and methods involved in managing a paperless environment, and talk about data locations, archiving, online review, document assembly and delivery, folder setup, and other associated tasks. The focus will be on a FileCabinet CS-centered environment, but will be applicable to all paperless environments. **Level: Intermediate**

Lecture

Instructor: Rob Carmines, MST, CFP®, PFS, CPA,
Carmines, Robbins & Company, PLC, Newport News, VA

Session: B10 or F10

Maximizing Performance of the CS Professional Suite on Your Network

Join us for this workshop that offers discussion and training on the basics of reliable, efficient networking and best practices to ensure top performance, reliability, and disaster recovery for all your software. We'll cover topics such as hardware, network setup, change control, and operating system setup and maintenance. **Level: Intermediate**

Lecture

Instructor: Chris Guthrie, Thomson Reuters

Session: G14

What's Cool in Technology These Days

Making sense of new technology can be challenging—and at the very least, confusing. Every day something new appears, from advances in hardware and software to security and entertainment. Who can keep up? More importantly, what's behind the hype, and how can you decide what warrants a closer look for practical implementation in the workplace today? This workshop will help you find the "cool" technology that offers value to your firm by saving time and improving productivity. We'll also take a look at some considerations for the near future.

Level: Basic

Lecture

Instructor: Craig Courtney, Thomson Reuters

Session: B9 or G13

Scanning Efficiencies & Best Practices *new*

Get the most out of your Fujitsu scanner with these tips and tricks. Learn how to determine which scanner is right for your office needs. Learn how to maintain your equipment, manage large scanning jobs, and perform quality control. You'll also learn best practices for managing a scanning department. **Level: Intermediate**

Lecture

Instructor: Scott Howard, Thomson Reuters

Session: C11 or G12

From CES to You *new*

Greg is an uber-geek in his annual trek to Las Vegas for the Consumer Electronics Show (CES), the world's largest exposition of all things techy. He's hunted down dozens of exciting new products, the toys and gadgets every accounting technologist should have! See what's new, what's useful, what's fun and what's affordable. This is the one presentation that your significant other does NOT want you to attend.
Level: Intermediate

Lecture (50 minutes)

Instructor: Gregory L. LaFollette, CPA.CITP, Executive Editor,
The Progressive Accountant

Session: D13

Building a Culture of Firm Optimization *new*

With accounting information, applications, and technology becoming commoditized, we believe that a firm's ability to identify, standardize, and implement optimal client service processes is the last sustainable competitive advantage that firms have today. Creating a firm culture of continuous learning will define the firm's future profitability. In this workshop we'll look at integrating a learning culture as well as the tools, resources, and best practices to do so; creating a strategic plan that incorporates optimum client service processes; a proven process to identify and implement a strategic plan; and benchmark statistics for budgeting, staffing and production. **Level: Advanced**

Lecture

Instructor: Roman H. Kepczyk, CPA.CITP,
InfoTech Partners North America, Inc., Phoenix, AZ

Session: A7

AICPA Top Technology Initiatives *new*

Each year the AICPA polls technology experts, system administrators, IT auditors, and end users across the profession to identify the most important information technologies, applications, and issues expected to impact financial professionals in the year ahead. In this workshop, you'll learn about leading edge technology that will impact your organization today as well as those "bleeding" edge technologies that could change your future. Key themes include practical resources and solutions to optimize security in your firm, key technologies firms use to better manage data, remote access technologies driving connectivity, and creating a culture to optimize firm production. **Level: Overview**

Lecture

Instructor: Roman H. Kepczyk, CPA.CITP,
InfoTech Partners North America, Inc., Phoenix, AZ

Session: B7

Security Concerns for Today's CPA Firm *new*

In this workshop, we'll look at the security threats that firm partners need to consider and discuss a list of best practices for keeping your firm protected. You'll leave with an understanding of the security threats that exist for your firm today and you'll know how to evaluate whether you're adequately protected. We'll also look at the new technologies and how they can be used to protect your firm without adding IT personnel costs. We'll also discuss practical questions to ask on a regular basis to make sure all your bases are covered. **Level: Overview**

Lecture

Instructor: Trey James, CEO, Xcentric, Alpharetta, GA

Session: G10

Strategic Technology Planning & Budgeting *new*

Intelligent technology planning and budgeting is crucial to the success of a CPA firm. Listen to and discuss what CPAs across the country are doing to leverage technology and use it as an asset to growing your firm and enhancing its culture. In this workshop you'll learn how to maximize your IT spendind in today's economy, how to leverage technology as an asset to firm growth and culture, and discuss practical ways to develop technology plans and budgets and how to stick to them.

Level: Overview

Lecture

Instructor: Trey James, CEO, Xcentric, Alpharetta, GA

Session: A10

Windows 7 *new*

In this workshop, you'll become familiar with several of the new features and capabilities introduced in Windows 7, the newest desktop operating system available from Microsoft. We'll review new features and changes to the user interface including configuration of user account control, BitLocker data encryption (and BitLocker To Go for removable storage devices), the Problem Steps Recorder, and DirectAccess. We'll also review hardware requirements and upgrade options from XP and Vista as well as version options and related costs. **Level: Intermediate**

Lecture

Instructor: Brent Goodfellow, CPA, CITP, One Tech Technology Advisors

Session: C8

Small Business Server 2008/Essential Business Server 2008 *new*

In this workshop, you'll learn the new options available for providing server resources in your firm. The Windows Essential Server Solutions family now includes Small Business Server 2008, Essential Business Server 2008 and Windows Home Server 2008. This provides an option for every size firm. The session will provide you with the information needed to make wise decisions as you select the option best suited to your firm's needs and resources. We will cover the various versions, capabilities and costs along with the benefits of each. **Level: Overview**

Lecture

Instructor: Brent Goodfellow, CPA, CITP, One Tech Technology Advisors

Session: A8

CONFERENCE WORKSHOPS

PROFESSIONAL TOPICS: WORKSHOP DESCRIPTIONS

TECHNOLOGY

Optimizing Software Integration within the CS Professional Suite and Beyond *new*

CS Professional Suite offers a wealth of integration opportunities to save you time. In this workshop we'll attempt to show all the possibilities of CS Professional Suite integration, and more importantly, how to make integration of the CS Professional Suite work best for you. We'll cover suggestions on how to set up the system and processes to maximize integration. You'll leave with workflow charts for each of the programs in the CS Professional Suite for reference and to share with staff that aren't at the conference, a checklist of trouble shooting items, and a list of processes to optimize the CS Professional Suite programs you own.

Level: Intermediate

Lecture

Instructor: Samantha Mansfield, Thomson Reuters

Session: D11 or H11

Social Networking 101 *new*

Having a hard time keeping up with trends like social media and social networking? Do you want to know what Web 2.0 means for you? This workshop will serve as an introduction and overview of several of the popular social networking tools including Facebook, Linkedin, and Twitter. Understand how these tools, and our own Accountants Resource Network (ARNE) Community, can assist with communication and collaboration in today's digital world for both business and personal use. **Level: Basic**

Lecture (50 minutes)

Instructor: Bryan Hoeft, Thomson Reuters

Session: D5 or H5

TAX

Individual Tax Update *new*

Here's your chance to get valuable information on the individual tax provisions in 2009 tax legislation. This discussion also covers regulations, rulings, and cases dealing with the following topics: passive activity and at-risk limitations, taxation of capital gains and qualified dividends, sale of a residence issues, first-time home buyers' credit, alternative minimum tax, 2009 tax form changes, and much more!

Level: Overview

Lecture

Instructor: Bill Harden, PhD., CPA, ChFC, Associate Professor of Accounting, University of North Carolina at Greensboro

Session: E13

Business Tax Update *new*

Get the latest information on the business-related provisions in 2009 tax legislation as well as the regulations, rulings, and cases dealing with the following topics: corporation, partnership, S corporation developments, accounting periods and methods, depreciation developments (luxury autos, section 179 expense, software, special depreciation elections), and much more! **Level: Overview**

Lecture

Instructor: Bill Harden, PhD., CPA, ChFC, Associate Professor of Accounting, University of North Carolina at Greensboro

Session: F13

PRACTICE MANAGEMENT

Acquiring/Selling a Tax & Write-up Practice

This session will introduce you to the most important considerations of acquiring or selling a tax and write-up practice. We'll cover such topics as the inter-relations of selling a practice, how to determine the value of a practice, due-diligence guidelines, understanding normal practice purchase terms, building vs. buying, and how to prepare an accounting practice for sale. **Level: Overview**

Lecture

Instructor: Sean Manning, CPA, Manning & Company, PC, Englewood, CO

Session: B12

How to Build a Write-up & Payroll Practice

If you're trying to build a solid write-up and payroll business, join us for this workshop, where we'll discuss the most important considerations of starting or growing a write-up or payroll practice. Topics will include staffing, systems management, service/fee agreements, important items to consider during expansion, ideas for different marketing techniques, and general firm growth strategies. **Level: Overview**

Lecture

Instructor: Sean Manning, CPA, Manning & Company, PC, Englewood, CO

Session: A12

Next Generation Accounting Firm

In this workshop, we'll explore how, with proper planning, change merely represents an opportunity for improvement and elevated success. Discover a simple formula for moving your firm forward: Define. Communicate. Deliver. We'll discuss the ever-changing climate of the profession and how to manage it with ease, the newest technologies and how to assess them for use in your firm, the value of integrated systems and a paperless work environment, the benefits of Software as a Service (SaaS), and much more! **Level: Overview**

Lecture

Instructor: M. Darren Root, CPA, CITP, Executive Editor, *The CPA Technology Advisor*, Root & Associates, LLC, Bloomington, IN

Session: A15 or G15

Experience the Competitive Edge with Checkpoint

Checkpoint, the top centralized, integrated, and customizable online research service, provides complete tax law, expert analysis, practitioner insights, news, cases, productivity tools and more. In this workshop, we'll introduce you to Checkpoint's powerful navigational and search elements. We'll also discover how Checkpoint can make your firm more efficient and profitable by offering research content (e.g., RIA, PPC, IRS) and workflow tools on a single platform that integrates smoothly with UltraTax CS. **Level: Intermediate**

Lecture (50 minutes)

Instructor: German Hernandez, Thomson Reuters

Session: D14 or H14

Protect Your Business from Fraud & Identity Theft

Do you know someone who has been a victim of identity theft? Do you feel comfortable that you have effective tools to protect your business—and you—from becoming the next victim? Protect yourself from fraud with the vital information you'll take away from this workshop. We'll discuss personal identity theft statistics, demonstrate the ways identity thieves operate, and give you helpful hints to protect yourself. On the business side, we'll also talk about corporate identity theft trends, risk management strategies, corporate responsibility, and share best practices for protecting your business. Each participant will receive a handbook of valuable tips for safeguarding information.

Level: Overview

Lecture

Instructor: Renee Bourdeaux, Vice President of Communication & Marketing, InterceptEFT and Bryan Smith, President and Co-Founder, InterceptEFT

Session: B14

Disaster Preparedness *new*

Floods. Earthquakes. Tornadoes. Blizzards. Hurricanes. Have one of these phenomena affected your business? Could they? Each year, many different types of disasters effect businesses all across the United States. This workshop will help your business be prepared for what may lie ahead. We'll share how InterceptEFT prepared for the Red River flooding in Fargo, ND, and we'll discuss how to plan for and reduce the impact of disasters. Participants will receive helpful tips for Disaster Preparedness for their own business. **Level: Overview**

Lecture (50 minutes)

Instructor: Renee Bourdeaux, Vice President of Communication & Marketing, InterceptEFT and Bryan Smith, President and Co-Founder, InterceptEFT

Session: H13

Microsoft Excel

Want to gain a better understanding of the integration between the CS Professional Suite and Microsoft Excel? Would you like to get more from your spreadsheet data? Then you won't want to miss this workshop! Discover all the ways you can use Microsoft Excel to analyze your data and help manage your business and your clients. We'll explore how to use advanced tools to help manipulate the data to look exactly the way you want it, and how you can use functions and formulas for maximum efficiency in your spreadsheets. This session is a must for anyone who uses spreadsheets to analyze their data.

Level: Intermediate

Lecture (50 minutes)

Instructor: Craig Courtney, Thomson Reuters

Session: D10

Time Management Best Practices *new*

Are you or your staff putting off till tomorrow what you could be doing today? Do you attend meetings that you know could be more productive? Do you want to learn how to use available technology to help you manage your business? Then this is the class you must attend. Time Management Best Practices, designed especially for the professional, will help you organize your day, organize your staff, and organize your firm to increase productivity and efficiency. **Level: Basic**

Lecture (50 minutes)

Instructor: Kelly Beattie, Thomson Reuters

Session: D9

CONFERENCE WORKSHOPS

PROFESSIONAL TOPICS: WORKSHOP DESCRIPTIONS

PRACTICE MANAGEMENT

Getting Even More Out of Outlook 2007 *new*

Did your firm make the move to Outlook 2007 recently? Do you need assistance with Outlook 2007's new look? If you said yes to either of these questions, you won't want to miss this workshop. In this lecture style workshop, we will review some of the changes in Outlook 2007, show you the new and enhanced features, and demonstrate some tools to help you use Outlook 2007 to help you be more efficient. **Level: Basic**

Lecture (50 minutes)

Instructor: Kelly Beattie, Thomson Reuters

Session: H10

Adding Financial & Payroll Services Panel *new*

Two of the hottest items being added to the service offerings of many practices are Payroll Preparation and the offering of Financial Services (Investments) to clients. This session offers a panel discussion with three firms that have added both of these services to their firm's offerings. We'll discuss the benefits and the burdens of these services, as well as how to get started. **Level: Overview**

Panel

Moderator: Gregory L. LaFollette, CPA.CITP, Executive Editor, The Progressive Accountant

Panelists: Rob Carmines, MST, CFP®, PFS, CPA, Carmines, Robbins & Company, PLC, Newport News, VA; Glenn Hanner, CPA, Hanner & Associates, PC, Bedford, TX; Vince Sirianni, CPA, Daly, Sirianni & Co., CPAs, LLP, Victor, NY

Session: C15 or F15

Value Pricing—Why It Works *new*

"Value" and "Pricing" are two buzz words that have really been buzzing around the profession over the last few years. Many firms continue to use the old hours times rate method even where technology and integrated systems promote a more efficient and effective workflow and improved productivity, resulting ultimately in enhanced profitability. Hear from a firm that has used value pricing successfully since 2003. Find out how and why value pricing works. Jason Lawhorn of Lawhorn and Associates, P.L.L.C. developed the firms first Value Pricing Agreement™ in 2003. Jason's approach to value pricing is very different from the Ron Baker approach and you won't want to miss how value pricing can take your firm to the next level of profitability and accountability within the firm and with your client base. **Level: Overview**

Lecture

Instructor: Jason Lawhorn, CPA, CITP, MAcc, Lawhorn & Associates, PLLC, Knoxville, TN

Session: C10 or F14

A Technical Consultant's Perspective on Paperless Audit Solutions *new*

In this workshop, you'll hear an informative overview of the paperless audit process and how it's designed to increase auditor productivity with practical solutions to common issues. The demands for increased efficiencies and improved staff skills, coupled with higher client expectations are causing leading-edge firms to reconsider technology that can help them succeed. We'll discuss and demonstrate solutions for common fieldwork issues, including networking, scanning, printing, tick marks, and how you can integrate these solutions with Engagement CS and PPC's Practice Aids to get more done in less time.

Level: Overview

Lecture

Instructor: Brian Tankersley, CPA.CITP, K2 Enterprises, Knoxville, TN

Session: E11

A Technical Consultant's View of Tips & Tools for Successfully Managing Paperless Engagements *new*

In this workshop, we'll review document management processes and terminology for public accounting practices, as well industry solutions. Learn the best ways to implement and manage your processes and workflows using these sophisticated tools that give you more than just an "electronic file cabinet." You can examine the recommended document management system, implementation process, and see how the tools such as scan-and-organize products and OCR software can help you locate information more efficiently. Other practical topics include scanner hardware recommendations, image enhancement software, and many other tools for a successful paperless implementation. **Level: Overview**

Lecture

Instructor: Brian Tankersley, CPA.CITP, K2 Enterprises, Knoxville, TN

Session: F11

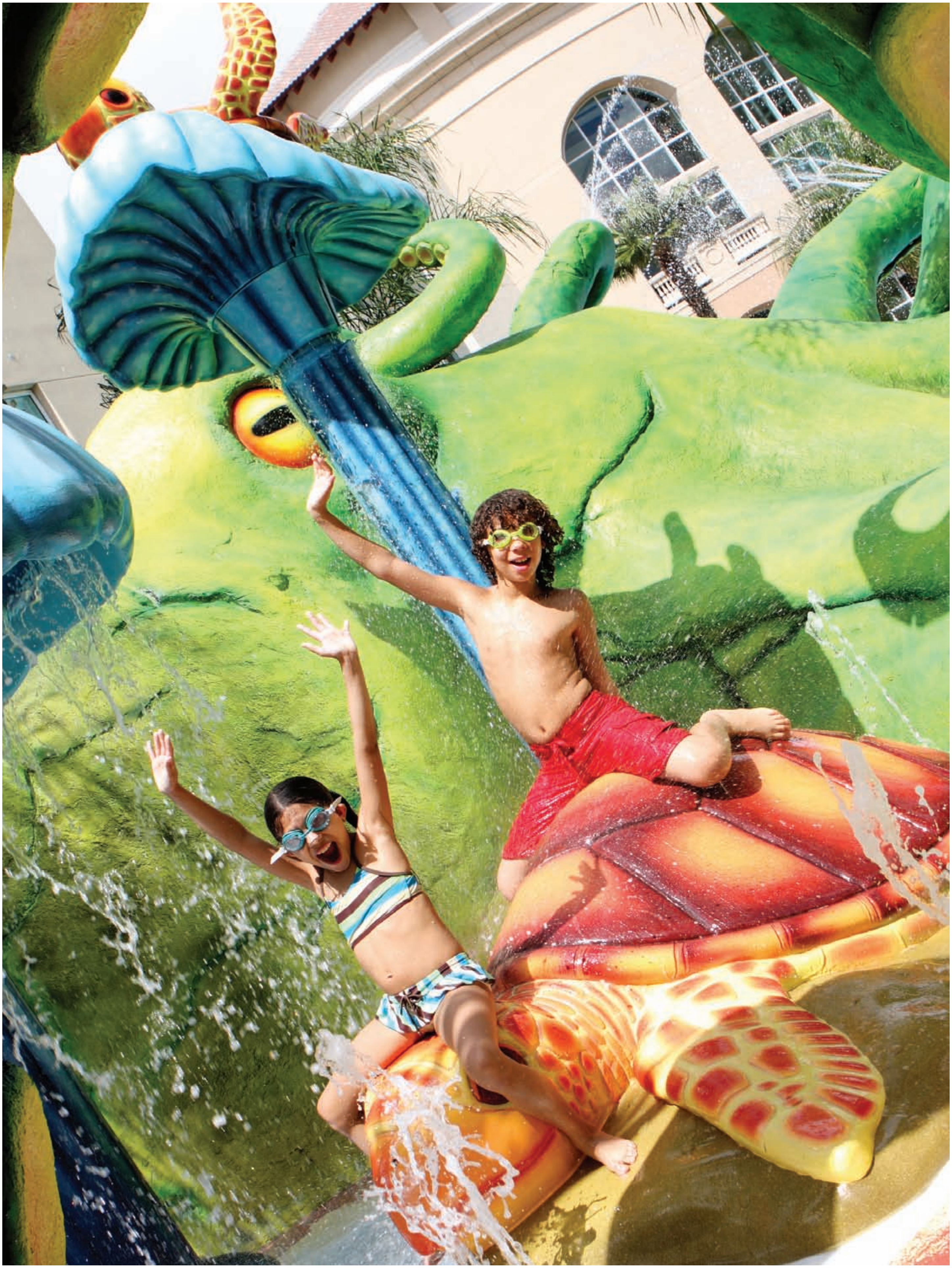
UltraTax CS Client Documents: Boot Camp for the "Print-If" Function *new*

Designed for UltraTax CS users with two or more tax seasons under their belts, this workshop will help you deliver more personalized client service. Learn how to customize client letters and correspondence using the powerful "Print-If " Statement. If you want to provide certain information to new clients, but different information to legacy clients, the "Print-If " Statement makes it easier to deliver a targeted message to ALL of your clients. Learn about it and many other hidden gems of the UltraTax CS system. This workshop will be taught by Lloyd Leuthner, a high volume UltraTax CS user since 2001. **Level: Intermediate**

Lecture (50 minutes)

Instructor: Lloyd Leuthner, CPA, Leuthner Tax and Financial, Green Bay, WI

Session: D15 or H15



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