32ND ANNUAL

THOMSON REUTERS USERS' CONFERENCE

FOR PROFESSIONAL TAX & ACCOUNTING FIRMS

GAYLORD TEXAN ★ GRAPEVINE, TEXAS

NOVEMBER 7-10, 2012

THOMSON REUTERS™


GAYLORD TEXAN

Dear Colleague,

You're cordially invited to attend our 32nd Annual Thomson Reuters Users' Conference for Professional Tax and Accounting Firms at the Gaylord Texan Hotel and Convention Center in Grapevine, Texas, from November 7-10, 2012.

Our Users' Conference is the longest-running conference of its kind. And we're preparing to greet you in Texas with a conference that's more informative—and more exciting—than ever. This year, you'll find many new opportunities to help guide your firm safely and profitably into the future.

The Lone Star State is brimming with Texas style and hospitality, and it's the perfect setting for the energy you'll find at the conference. Through informative workshops, training sessions, and presentations, you'll explore and network with hundreds of fellow tax and accounting professionals from all over the country. The contacts you'll make will benefit you long after you're back at the office, not only in friendships, but in year-round support and feedback.

As your technology partner, it's our mission to continuously help you enhance your practice. And this year's agenda will help you take advantage of innovations in technology to save time and increase your firm's efficiency. Thanks to your feedback, we've adjusted some sessions, and added more than 55 new topics that range from putting social media to work in your practice to finding and retaining superstar employees. You can be sure that you'll arrive home with practical tips that you can put to work in your firm immediately.

Here's just a few of the highlights:

- NATIONALLY RECOGNIZED SPEAKERS—A lineup of well-known accounting, technology, and motivational experts to inspire you.
- POWERFUL WORKSHOPS—More than 80 interesting, relevant, and timely topics to help your firm grow and prosper.
- TECHNOLOGY UPDATES—Up-to-the-minute information on how to best leverage the web, along with more details on improving workflow with Workpapers CS™, client collaboration with Accounting CS™, and on-the-go connectivity with Mobile CS®.
- ADOPTING ADVANCED TECHNOLOGY PROCESSES—See how the CS Professional Suite® and the Enterprise Suite™ make it easy for you to create completely digital, end-to-end processes for taxes, payrolls, and engagements by combining integrated workflow systems, 24/7 web access, paperless capabilities, and far-reaching integration with other products, services, and technologies.
- PRODUCT DEMONSTRATIONS—Our professional, 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, discover how to accomplish more work in less time with fewer resources through CS Professional Suite and Enterprise Suite hands-on training.
- CPE CREDITS—Earn up to 20 CPE credits. It's an easy, convenient way to maximize your educational experience.

I hope you'll join us for practical, profit-generating ideas, networking opportunities, and some fun along the way.
I look forward to seeing you in Texas!

Sincerely,

Jonathan A. Baron
Managing Director
Professional Segment
Tax & Accounting
Thomson Reuters

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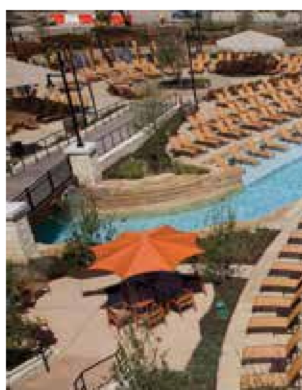


REGISTER BY AUGUST 31

SAVE $300 OR MORE

- **SAVE $150**—With the Early Bird Discount
- **SAVE $50**—If you attended the 2012 Users' Conference
- **SAVE $100**—On each additional attendee from your firm
- **FREE FINANCING**—Pay half when you register and half on October 3

RESERVE YOUR ROOM BY AUGUST 31 FOR A CHANCE TO

WIN A FOUR-NIGHT STAY IN A LUXURY SUITE

OR AN APPLE® OR AMERICAN EXPRESS® GIFT CARD

GAYLORD TEXAN HOTEL & CONVENTION CENTER
Ask for our group rate: **C-TNJOB Professional Users' Conference**.
Discounted room rates start at $224 and are based on availability.

CONFERENCE AGENDA ★ EARN UP TO 20 CPE CREDITS

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 20 hours of CPE credit.

WEDNESDAY, NOVEMBER 7

- **Product Demo Theater** 12-5 p.m.
- **Registration Desk** 1-5 p.m.
- **Pre-Conference Workshops** 1:30-4:30 p.m.
- **Sales, Support, Training & Vendor Booths** 1-5 p.m.
- **Welcome Reception** 5-7 p.m.
  Please join us for a casual "come as you are" reception to get acquainted with your fellow attendees. Light hors d'oeuvres will be served. This event is included in your conference registration fee; for each non-registered guest, add $35 to your registration form (page 12). Conference ID is required for admittance.

THURSDAY, NOVEMBER 8

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

FRIDAY, NOVEMBER 9

- **Product Demo Theater** 7 a.m.-5:30 p.m.
- **Registration Desk** 7 a.m.-5:30 p.m.
- **Sales, Support, Training & Vendor Booths** 7 a.m.-5:30 p.m.
- **Breakfast Buffet & Demos** 7-8 a.m.
- **Morning Keynote—**Gale Crosley, CPA 8-8:50 a.m.
- **Time Slot D Workshops** 9:10-10 a.m.
- **Refreshment Break & Demos** 10-10:30 a.m.
- **Time Slot E Workshops** 10:30 a.m.-12:10 p.m.
- **Luncheon Buffet & Product Demos** 12:10-1:30 p.m.
- **Time Slot F Workshops** 1:30-3:10 p.m.
- **Refreshment Break & Demos** 3:10-3:40 p.m.
- **Time Slot G Workshops** 3:40-5:20 p.m.
- **Friday Night Event** 6:30-10:30 p.m.

SATURDAY, NOVEMBER 10

- **Product Demo Theater** 7-8 a.m.
- **Registration Desk** 7-11:30 a.m.
- **Sales, Support, Training, & Vendor Booths** 7 a.m.-12 p.m.
- **Breakfast Buffet & Demos** 7-8 a.m.
- **Time Slot H Workshops** 8-9:40 a.m.
- **Morning Keynote—**Connie Podesta 10-11:45 a.m.

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 submitted to the National Registry of CPE Sponsors through its website: **learningmarket.org**.

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

KEYNOTE SPEAKERS ★ BE INSPIRED BY EXPERTS

JON BARON

Opening Keynote
THURSDAY, 8-9:30 a.m.

KICKOFF KEYNOTE ADDRESS

Jon Baron, Managing Director, Professional Segment, Tax & Accounting, Thomson Reuters, will speak on technology trends and advancements, and he'll demonstrate how easy it is for firms of any size—just like yours—to increase process efficiencies by taking advantage of these innovations. He'll also report on the most recent changes and fluctuations within the tax and accounting profession. And he'll show you how these shifts are being progressively addressed with mobile technology and advanced workflow systems that replace traditional stand-alone products.

GALE CROSLEY, CPA

Friday Morning Keynote
FRIDAY, 8-8:50 a.m.

GROWTH LEADERSHIP IN TURBULENT TIMES

Gale Crosley consults with accounting professionals to create high-growth cultures by helping them develop the best strategies and tactics for driving revenue from all aspects of their practices. Her 35+ years of experience features a unique combination as a practicing CPA, a senior manager in a technology environment, and author. Recently she was selected as one of the 10 Most Recommended Consultants in the *Inside Public Accounting* BEST OF THE BEST for the eighth consecutive year and one of the Top 100 Most Influential People in Accounting by *Accounting Today* for the sixth consecutive year. Gale attended the University of Akron, is the winner of the Simonetti Distinguished Business Alumni Award, and is on the Editorial Advisory Board of the *Journal of Accountancy*.

CONNIE PODESTA

Conference Closing Keynote
SATURDAY, 10-11:45 a.m.

ABSOLUTE FEARLESS SUCCESS

Connie Podesta likes to help people achieve success. At 14, she was doing comedy before she earned two degrees, one in speech/communication and one in business, followed by a graduate degree in human relations and counseling. Using her talent and credentials, she worked as a human resources and staff development director, which basically made her the in-house therapist for 600 managers and employees. Since then, Connie has skyrocketed her original $3,000 business loan into a multimillion dollar enterprise through counseling, training, and coaching on change, personal and professional growth, productivity, leadership, and sales. In her presentation, she'll show you how you can take your own success to a whole new level.

PRODUCT DEMO THEATER ★ GET A QUICK OVERVIEW

Product Demos are designed to give you a thumbnail view of new tools and features and introduce new ideas and applications—in less than 25 minutes. And they're a great way to get a quick overview of our software's capabilities, features, and benefits. Starting on Wednesday, these sessions will run simultaneously and continue at the breaks throughout the conference.

ACCOUNTING CS™

ACCOUNTING RE-IMAGINED: ACCOUNTING CS—This product demo illustrates the new workflow and client collaboration possibilities offered by the revolutionary single-platform architecture of Accounting CS.

ACCOUNTING CS PAYROLL: NEW EFFICIENCIES, NEW POSSIBILITIES—See why payroll is one of the most lucrative services a firm can offer, especially when many advancements in input speed and database structure—included in Accounting CS Payroll—are put to use.

STRENGTHENING THE CLIENT-ACCOUNTANT RELATIONSHIP WITH ACCOUNTING CS CLIENT ACCESS—See how Accounting CS Client Access makes real-time collaboration with clients possible with a shared database. No more importing and exporting files with clients. You maintain control of the process and customize the Accounting CS experience for your clients to meet their needs.

INTRODUCING WORKPAPERS CS™ TO YOUR PRACTICE—See Workpapers CS in action as part of a paperless tax workflow for your clients. This session will explore the trial balance, workpaper management, review tools, and other functions to help with tax workpaper management for your business and individual tax processes.

CS PROFESSIONAL SUITE ACCOUNTING

ENGAGEMENT CS® WORKFLOW FOR AUDITS—See how Engagement CS integrates seamlessly with professional audit tools such as PPC's SMART Practice Aids™ to provide you with the ultimate in convenient, secure, and efficient processing.

CLIENT PORTALS AND DOCUMENT MANAGEMENT

NETCLIENT CS® PORTALS: MORE THAN DOCUMENT DELIVERY—Discover how NetClient CS can help your firm meet the changing needs of web-connected firms, help make your operations more efficient and profitable, and increase client service.

FILECABINET CS®: WHERE DOES IT FIT IN YOUR PROCESS?—Find out about features that can make FileCabinet CS an even more useful part of your firm's tax and accounting processes, including tools for eliminating data entry, improving organization, and arranging the on-screen environment to increase efficiency.

GOFILEROOM®: A DIFFERENT KIND OF DOCUMENT MANAGEMENT—Discover how this web-based system can offer a different way for storing, searching, and archiving documents. See how easy it can be to route documents between staff and set a standard storage structure all within your firm's private "cloud."

CLOUD COMPUTING

VIRTUAL OFFICE CS® AND SAAS: OPTIONS FOR A HOSTED SOLUTION—Explore the ways hosted software solutions can save time and money and create a more flexible work environment. We'll also discuss licensing options, including differences between SaaS for CS Professional Suite and Virtual Office CS.

PRACTICE CS®

MANAGE CLIENT RELATIONS WITH PRACTICE CS CLIENT MANAGEMENT—See how to use the Client Management module of Practice CS to keep client and new business information in one central location.

STAFF MANAGEMENT WITH PRACTICE CS—See how you can use Practice CS, including the award-winning Staff Management module, to create one central location for assigning work based on skill level and availability, as well as tracking staff hours and CPE credits.

PRACTICE CS®

PRACTICE MANAGEMENT TOOLS: PRACTICE CS AND PROJECT MANAGEMENT—Many firms use a combination of tools (such as Microsoft® Excel®, Microsoft Outlook®, time and billing software, and other products) to manage their practices. While this approach works, it often takes extra time—plus it's still difficult to get all the information you need. This session will show you how Practice CS can help you manage your firm more efficiently and effectively.

ULTRATAX CS®

MAKING MORE MONEY WITH TAX SERVICES—This session offers ideas on how to use the UltraTax CS platform to thrive in today's increasingly competitive tax environment by building the value of your tax services with clients. Topics include adding client involvement, understanding ever-changing tax regulations, and offering expanded planning services.

CS PROFESSIONAL SUITE

MOBILE TECHNOLOGY AND THE CS PROFESSIONAL SUITE—Come and explore the various ways in which you can incorporate Thomson Reuters mobile technology into your practice. In this session, we'll dig into the practical uses of our mobile apps and access to Virtual Office CS through tablet devices.

AUTOMATING TAX WORKFLOW—We have many tools available for automating your individual and business tax return process. See how easy it is to streamline collection, preparation, and delivery to save time throughout the whole process. Some of these tools are new and some have been available for a while, but you'll benefit from seeing how they all fit into your workflow.

WEB BUILDER CS® POWERED BY EMOCHILA—Take a look at the new website design and flexibility provided through Web Builder CS powered by Emochila. See how we can help you create a custom, affordable website that ensures you have a cutting edge, attractive, and comprehensive web presence.

MYPAY SOLUTIONS®

MYPAY SOLUTIONS, PAYROLL PROCESSING SERVING YOU AND YOUR CLIENTS—See an overview of myPay Solutions and see how you can enjoy all the benefits of payroll, like bigger profits and enhanced client service, without the hassle of actually having to process it.

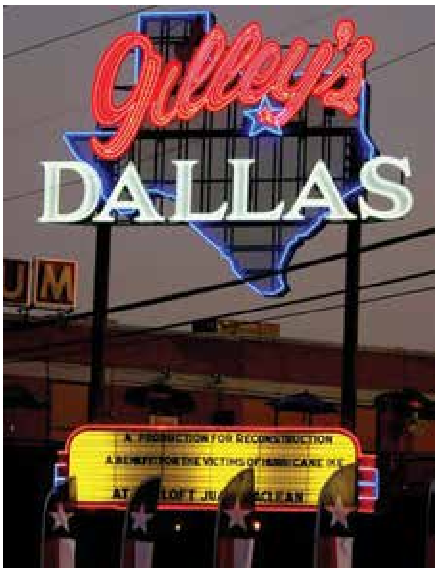
ADDING REVENUE, NOT WORKLOAD—HOW FIRMS ARE GETTING AHEAD WITH MYPAY SOLUTIONS (PANEL DISCUSSION)—Hear from our referring accountants how myPay Solutions increases revenue, provides reliable personal service to clients, and supports your firm's client relationships.

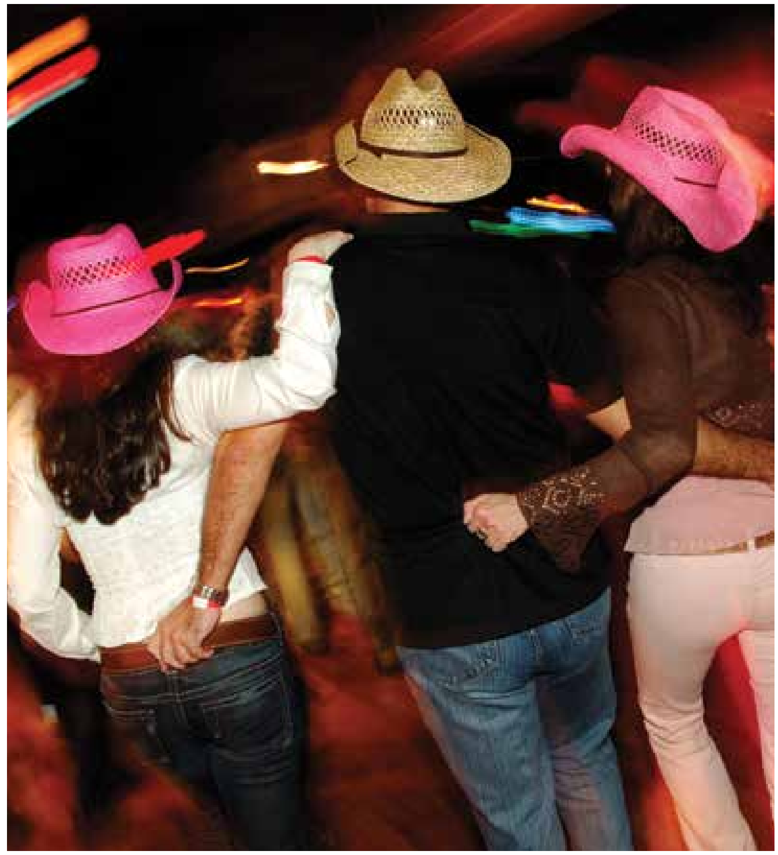
CHECKPOINT®

CHECKPOINT FOR TAX PROFESSIONALS—We'll demonstrate the integration between Checkpoint and UltraTax CS with an overview of this comprehensive tax research tool, and we'll show you how to get lots of tax information in one centralized online location.

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 ★ FRIDAY, NOVEMBER 9 ★ 6:30 p.m. - 10:30 p.m.





GILLEY'S DALLAS

HARD HAT DAYS AND HONKY-TONK NIGHTS

The original "Gilley's Club" in Pasadena, Texas, was featured in the 1980 film ***Urban Cowboy***, an American romantic drama about the love-hate relationship between Bud (John Travolta) and Sissy (Debra Winger). This local honky-tonk, co-owned by country singer Mickey Gilley, was claimed to be the largest indoor bar in the world at that time.

Today the legend continues with **Gilley's Dallas**—a premier venue offering the best in Texas hospitality, food, and entertainment. Here you'll have the chance to experience a real honky-tonk night in an environment reminiscent of the Texas roadhouses common to this region.

At 6:30 p.m., you'll assemble at the hotel and be transported to Gilley's Dallas, located just south of downtown. The evening will feature a delicious "**Borderque**" **Buffet Dinner**, including Texas favorites like smoked beef brisket, hill country sausage, tacos, enchiladas, rice and beans, apple empanadas with cinnamon ice cream, and much more. **Beer and wine** is included and will be served from a long western copper-furnished bar.

Musical entertainment will be provided by Lone Star Attitude, a unique live show that pays tribute to the legends of Texas music, from Stevie Ray Vaughn and ZZ Top to Waylon and Willie. **Line dance instructors** will be present to teach you simple steps to popular line dances. You can also ride El Toro the **mechanical bull**, try your hand at roping a calf on the **Rollo Roper**, and test out your speed with a six-shooter in a **quick draw battle** with a western gunfighter. We'll also have **western caricature artists** available, a strolling **cowboy magician**, and a green-screen photo booth so you can go home with a **western-themed photo souvenir**.

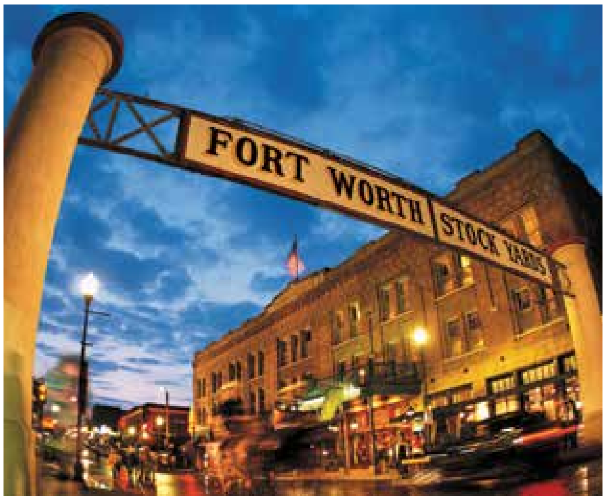
We're pleased to sponsor this optional event and offer you and your guests an unforgettable evening at a reduced rate. The cost is just **$60 per adult** and **$30 per child**, which includes transportation, dinner, drinks, and entertainment.

SPOUSE / GUEST PROGRAM ★ THURSDAY, NOVEMBER 8 ★ 8:30 a.m. - 4 p.m.

FORT WORTH STOCKYARDS & MAIN STREET GRAPEVINE TOUR

HAPPY TRAILS TO YOU

This optional program offers an opportunity for your spouse or guest to participate in the Users' Conference **Welcome Reception** and to explore some of the old Wild West while conference workshops are in session.



Your day starts with a **Get-Acquainted Breakfast** at the Gaylord Texan. Then, you'll be transported to the **Fort Worth Stockyards**–once the largest horse and mule market in the world–where you'll learn about the exciting history of the Wild West and the impact that Fort Worth had during that time period. You'll also tour the **Texas Cowboy Hall of Fame**, honoring Texas men and women who have excelled in the sports of rodeo and cutting. After the tour, you'll have some free time for **shopping at the Stockyards Station** before the **Fort Worth Herd Cattle Drive**–the only live cattle drive in the U.S. During this demonstration, you'll see how cowboys drove cattle from one location to the next on horses. Then you'll enjoy a family-style enchilada lunch at **Joe T Garcia**'s, one of Fort Worth's favorite and most authentic Mexican restaurants.

After lunch, you'll be transported to the **Cross Timbers Winery** for a wine and cheese tour, where you'll taste some vintage wines from North Texas, each with its own unique history and charm. And finally, you'll get some more free time for **shopping on Main Street in historic Grapevine** before returning to the hotel.

The program cost of **$165 per person** includes the Wednesday Welcome Reception, the Thursday Get-Acquainted Breakfast, the tours described above, your tour transportation, and your lunch at Joe T Garcia's.

ABOUT THE WORKSHOPS ★ MORE THAN 80 TO CHOOSE FROM

WORKSHOPS AND PRODUCT DEMONSTRATIONS

THE *new* SYMBOL INDICATES THAT THE WORKSHOP IS NEW THIS YEAR.

STEP 1: DEVELOP YOUR WORKSHOP SCHEDULE
Use the Workshop Schedule on pages 16-17. We recommend that you first select the courses you want to attend most; then schedule your other courses around those. Sessions run for 50 or 100 minutes, but some sessions span more than one time slot.

STEP 2: REGISTER FOR YOUR WORKSHOPS
Register online at **CS.ThomsonReuters.com/UC** or use the registration form on page 12.

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 CPE credit details on page 4.)
- PREREQUISITES OR PROFICIENCY LEVELS for some workshops, indicating the skill or experience level for which the class has been designed. Please note these requirements (found in the workshop description only) to 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 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 16-17. Many popular workshops are offered more than once and 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 the Tax & Accounting business of Thomson Reuters.

WORKSHOP CATEGORIES

WORKSHOPS FALL INTO TWO CATEGORIES:

- PRODUCT & SERVICES—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, and each participant will be provided with a laptop to use. Hands-on workshops often span multiple sessions and require an additional charge to help cover the cost of the rented computer equipment.
- PROFESSIONAL TOPICS—Presentations and discussions giving practical insights on current topics of interest to accountants. Led by instructors who are experts in their respective fields and can offer valuable, professional insight, these workshops fall into three categories: **Technology**, **Tax**, or **Practice Management.**

NOTE—Any prerequisites or advance preparation requirements are specified in the workshop descriptions. All courses are presented by live instructors in a classroom setting. For more information regarding administrative policies, such as complaints or refund requests, please call 800.968.0600.

CONFERENCE REGISTRATION ★ CS.ThomsonReuters.com/UC

It's quick and easy to register online at **CS.ThomsonReuters.com/UC**. The registration fee is $1,295. **Register online by August 31 for FREE financing** (see website for details). If you prefer to fax or mail your registration, please make a photocopy of this form for each individual you wish to register. Complete the registration, course selection, and payment details and mail or fax the registration form with payment to:

THOMSON REUTERS ★ Tax & Accounting, Professional Software & Services ★ **Attn:** UC Registration
7322 Newman Boulevard, Dexter, MI 48130
Or fax completed form to: **FAX 734.426.5946**. Questions? **PHONE 800.968.0600** (option 1, then 6).

REGISTRATION FEE INCLUDES:

- Keynote Addresses and Workshops for which you wish to register
- Welcome Reception
- Breakfast Thursday, Friday, and Saturday; lunch Thursday and Friday
- Roundtable Discussion Groups and Hospitality Suite on Thursday evening
- Conference materials

WORKSHOPS

1. Refer to the workshop descriptions (p. 18-32) to select the workshops you wish to attend.
2. Use the Workshop Schedule (p. 16-17) 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	Session #	Time	Session #
A	______	E	______
B	______	F	______
C	______	G	______
D	______	H	______

METHOD OF PAYMENT

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

Please charge my:

☐ MasterCard ☐ VISA
☐ AMEX ☐ Discover

Card #: ______________________

Exp. Date: ______________________

____
Name on Card

____
Cardholder's Signature

REFUNDS—*A full refund will be issued if registration is cancelled on or before October 12, 2012.*

Name ______________________

Preferred First Name on Badge ______________ Firm ID ______________

Firm Name ______________________

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? ________

CONFERENCE REGISTRATION FEE

First Attendee from Firm	$1,295	$ ______
Additional Attendee from Firm	$1,195	$ ______
EARLY-BIRD REGISTRATION—Subtract *(Must be postmarked on or before August 31, 2012.)*	-$150	$ ______
ATTENDED 2011 CONFERENCE—Subtract	-$50	$ ______

HANDS-ON COMPUTER FEE

☐ Accounting CS Essentials: Accounting Services	$40	$ ______
☐ Accounting CS Essentials: Payroll Services	$40	$ ______
☐ Accounting CS Report Designer - Formatting Financial Statements	$40	$ ______
☐ Accounting CS Payroll Report Designer - Formatting Payroll Reports	$40	$ ______
☐ Accounting CS Import from QuickBooks® Pro	$40	$ ______
☐ UltraTax CS Setup Essentials	$40	$ ______
☐ UltraTax CS Advanced Client Document Features	$40	$ ______
☐ UltraTax CS Partner Review and Planning Tools	$20	$ ______
☐ Fixed Assets CS Essentials	$40	$ ______
☐ UltraTax CS Best Practices Laboratory for SaaS/Virtual Office CS	$40	$ ______
☐ Practice CS Project Management & Workflow	$40	$ ______
☐ Practice CS Custom Formatting Essentials 2	$40	$ ______
☐ Practice CS Report and Invoice Format Laboratory	$20	$ ______

PRE-CONFERENCE WORKSHOP—One half-day session .... $150 $ ______
Workshop Code(s) PRE p.m. ______ (See page 14-15)

FRIDAY NIGHT EVENT—Number of Adults ______ .... each $60 $ ______
Number of Children ______ .... each $30 $ ______

SPOUSE/GUEST PROGRAM—Thursday, November 8 (See page 10) .... $165 $ ______
Name ______________________

WEDNESDAY WELCOME RECEPTION— Non-Registered Guests .... each $35 $ ______

TOTAL AMOUNT DUE $ ______

HOTEL REGISTRATION ★ CS.ThomsonReuters.com/UC

Reservations and payment are handled directly by the Gaylord Texan.
Ask for our group rate: **C-TNJOB Professional Users' Conference.** Reservations can be made online, by phone, or by fax (if faxing, please include payment information).

ONLINE **CS.ThomsonReuters.com/UC** (select the Travel tab)
Use this URL to take advantage of our special group rate.

PHONE 866.782.7897
FAX 817.778.2049

NAME ______________________________

ARRIVAL DATE ______________ DEPARTURE DATE ______________

ADDRESS ______________________________

CITY ______________ STATE ______ ZIP ______

HOME PHONE ______________________________

BUSINESS PHONE ______________________________

FAX ______________________________

EMAIL ADDRESS ______________________________

ROOM PREFERENCE Please Select

☐ $224—Texas or Atrium View ☐ $264—Lone Star Texas or Lone Star Atrium View
☐ Accessibility Needs—Please Specify: ______________________________

NOTE

- For discounted rates, reservations must be made online by October 12, 2012.
- There is a 12% per-room per-night tax.
- A limited number of rooms for guests with special needs are available, in accordance with ADA.

PAYMENT INFORMATION Please provide credit card Information to guarantee your reservation.

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

CARD NUMBER ______________________________ EXP. DATE ______________

NAME ON CARD ______________________________

CARDHOLDER'S SIGNATURE ______________________________

MAKE YOUR RESERVATIONS ONLINE NOW: CS.ThomsonReuters.com/UC.

- Select the Travel tab or call the Gaylord Texan at 866.782.7897 and ask for our group rate: **C-TNJOB Professional Users' Conference**.
- To avoid duplicate reservations, choose only ONE option when booking.
- Reservation requests must be received by **October 12, 2012**, to qualify for the special discounted room rate and to ensure room availability. Rooms are limited.
- Stay and explore Dallas! The **Gaylord Texan is extending the group rate** for three days before and three days after the main program dates of November 7-10, 2012, based on availability.
- Check-in time is **3:00 p.m.**; check-out time is **11:00 a.m.**
- Cancellation policy is **four days prior to scheduled arrival date**.

GAYLORD TEXAN

1501 Gaylord Trail
Grapevine, Texas 76051

The Gaylord Texan is just six minutes from Dallas-Fort Worth International Airport. Under climate-controlled glass atriums overlooking Lake Grapevine, you'll find some of the most distinctive shopping, dining, and recreation options—all under one roof!

INCLUDED IN YOUR ROOM RATE

- Local phone calls up to 20 minutes ($0.10/minute thereafter).
- Toll-free and credit card calls up to 20 minutes ($0.10/minute thereafter).
- Bottled water (2 per room, per day)
- Access to the resort's state-of-the-art Fitness Center.
- Wireless Internet access in each guest room and throughout the hotel.
- Discounted shuttle service to Grapevine Mills Mall and Downtown Grapevine on pre-set schedule.

WIN EXCITING PRIZES!

Reserve your room by **August 31** to be entered into a drawing for:

- Four-Night Stay in a Luxury Suite during the conference
- $200 Apple Gift Card
- $100 American Express Gift Card
- $50 American Express Gift Card

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

WEDNESDAY, NOVEMBER 7

WEDNESDAY AFTERNOON WORKSHOP SCHEDULE | 1:30-4:30 p.m.

PRE-PM1—Practice CS Setup Essentials

PRE-PM2—Practice CS Processing Essentials

PRE-PM3—Accounting CS Essentials: Accounting Services *new*

PRE-PM4—UltraTax CS Individual

PRE-PM5—UltraTax CS Corporations / Partnerships

PRE-PM6—Implementing a Portal Strategy

Note: The red code (e.g. PRE PM1) represents the workshop number, which is needed for registration. A half-day session earns 3 CPE credits.

PRACTICE CS SETUP ESSENTIALS

Practice CS is a powerful and flexible tool that allows you to manage all your firm's key details from one centralized location. This hands-on workshop will help you design and navigate the revolutionary digital dashboards to quickly access real-time information about your firm. You'll also discover how to set up Practice CS at the system, firm, office, activities, client, and staff levels. Join us and discover how to set up Practice CS to suit your firm's needs.

Level: Basic

Hands-On

Instructor: Noel Zykowski, Thomson Reuters

Session: PRE-PM1

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 will cover such topics as producing work-in-progress reports, creating bills, setting up billing defaults, and using different methods of billing to create invoices. You'll also see how to enter accounts receivable information and use the reporting system to generate useful client, employee, and firm reports.

Level: Basic

Hands-On

Instructor: Judi Dent, Thomson Reuters

Session: PRE-PM2

$150 FOR ONE HALF-DAY SESSION ★ ADDITIONAL EQUIPMENT COSTS ARE INCLUDED

ACCOUNTING CS ESSENTIALS: ACCOUNTING SERVICES *new*

This hands-on workshop will focus on the basics of Accounting CS. You'll have the opportunity to walk through the program, update the Accounting CS database with new client data, view and modify the trial balance grid, and execute procedures for data entry and closing the period. We'll also highlight process and workflow functions that will make you more efficient and reduce the time spent on each client. Attendees will get a comprehensive overview of new client setup and software navigation.

Level: Basic
Hands-On
Instructor: Mark Wiseman, Thomson Reuters
Session: PRE-PM3

ULTRATAX CS INDIVIDUAL

This advanced workshop will show you how to get the most out of the UltraTax/1040 software. Topics include setting up 8615 data sharing and K-1 data sharing of a business return into the individual return. We'll also discuss showing data entry for supplemental business expenses, estimated tax payments, importing spreadsheet items, and running the Filing Status Optimization and Education Optimization reports. In addition, we'll explore amending a tax return, processing Net Operating Losses, entering multi-state apportionment, and much more. Prerequisites include a working knowledge of UltraTax/1040 and/or successful completion of UltraTax/1040 Essentials 1.

Level: Advanced
Hands-On
Instructor: Tom Gawne CPA, Thomson Reuters
Session: PRE-PM4

ULTRATAX CS CORPORATIONS / PARTNERSHIPS

This workshop provides a walk-through of the options and features for advanced 1120/1065 data entry in UltraTax CS. Topics include integration with general ledger information, data entry requirements for multi-state apportionment, calculating Net Operating Losses, and analyzing the Schedule L, M-1, and M-2. We'll also cover data entry for the 1377 election, shareholder and partner basis, and working with change of ownership and specially allocating amounts to specific partners. Prerequisites include a working knowledge of UltraTax/1120 and 1065 and/or successful completion of UltraTax/1120 & 1065 Essentials 1.

Level: Advanced
Hands-On
Instructor: Chris Lillis, Thomson Reuters
Session: PRE-PM5

IMPLEMENTING A PORTAL STRATEGY *new*

Whether you're implementing portals for the first time or you want to increase your online presence, this workshop will show you how NetClient CS can provide 24/7 solutions to you and your clients. We'll discuss rolling out portals (including marketing portals) to staff and clients, establishing workflow and procedures, and training staff and clients. Come ready to engage in open discussions with Thomson Reuters staff and your peers.

Level: Intermediate
Lecture
Instructor: Samantha Mansfield, Thomson Reuters
Session: PRE-PM6

WORKSHOP SCHEDULE ★ USE THIS TO DEVELOP YOUR SCHEDULE AND REGISTER

Day	Session	Time	Length	1 (Hands-on Classes)	2 (Hands-on Classes)	3 (Hands-on Classes)	4 (Hands-on Classes)	5	6	7
THURSDAY	A	10:00 - 11:40 a.m.	100 min	Accounting CS Payroll Report Designer: Formatting Payroll Reports Hands-on new (1 of 2) Garcia SK (p. 19)	Accounting CS Essentials: Payroll Services Hands-on (1 of 2) Wiseman SK (p. 18)	Practice CS Report and Invoice Format Laboratory Hands-on new Zykowski SK (p. 24)	Accounting CS Essentials: Accounting Services Hands-on (1 of 2) Harden SK (p. 18)	UltraTax CS: What's New new Witherow SK (p. 21)	Killer Apps for the iPad James SK (p. 27)	Introducing Workpapers CS, the Newest Addition to the Accounting CS Suite new Gawne SK (p. 20)
THURSDAY	B	1:20 - 3:00 p.m.	100 min	Accounting CS Payroll Report Designer: Formatting Payroll Reports Hands-on new (2 of 2) Garcia SK (p. 19)	Accounting CS Essentials: Payroll Services Hands-on (2 of 2) Wiseman SK (p. 18)	UltraTax CS Partner Review and Planning Tools Hands-on new Leong SK (p. 22)	Accounting CS Essentials: Accounting Services Hands-on (2 of 2) Harden SK (p. 18)	UltraTax/1040: Gems & Tips from a High Volume User Leuthner SK (p. 22)	Building a Marketing Strategy Around a Defined Business Model to Grow Your Practice... new Root MGT (p. 30)	UltraTax/1120 & 1065 Essentials 2 Burgman SK (p. 20)
THURSDAY	C	3:30 - 5:10 p.m.	100 min	UltraTax CS Advanced Client Document Features Hands-on new (1 of 2) Johnson SK (p. 21)	Practice CS Custom Formatting Essentials 2 Hands-on (1 of 2) Zykowski SK (p. 23)	UltraTax CS Setup Essentials Hands-on new (1 of 2) Burgman SK (p. 20)	Accounting CS Import from QuickBooks Pro Hands-on new (1 of 2) LaJoye SK (p. 20)	UltraTax CS: What's New new Witherow SK (p. 21)	Using Mobile Devices in the Tax & Accounting Profession new Kellerhals SK (p. 27)	UltraTax/1040 Essentials 2 Lillis SK (p. 20)
FRIDAY	D	9:10 - 10:00 a.m.	50 min	UltraTax CS Advanced Client Document Features Hands-on new (2 of 2) Johnson SK (p. 21)	Practice CS Custom Formatting Essentials 2 Hands-on (2 of 2) Zykowski SK (p. 23)	UltraTax CS Setup Essentials Hands-on new (2 of 2) Burgman SK (p. 20)	Accounting CS Import from QuickBooks Pro Hands-on new (2 of 2) LaJoye SK (p. 20)	Data Mining: How to Master this Efficient and Effective Tool new Leuthner SK (p. 31)	Organic Growth: How to Sell Accounting and Tax Services to Prospective Clients Steinberg MGT (p. 32)	Planner CS & ToolBox CS Essentials new Skowronek SK (p. 22)
FRIDAY	E	10:30 - 12:10 p.m.	100 min	Accounting CS Report Designer: Formatting Financial Statements Hands-on new (1 of 2) Garcia SK (p. 19)	Practice CS Project Management & Workflow Hands-on (1 of 2) Dent SK (p. 23)	UltraTax CS Best Practices Laboratory for SaaS/Virtual Office CS Hands-on new (1 of 2) McQueen SK (p. 22)	Accounting CS Essentials: Accounting Services Hands-on (1 of 2) Harden SK (p. 18)	Individual Tax Update new VanDerAa T (p. 29)	Building a Marketing Strategy Around a Defined Business Model to Grow Your Practice... new Root MGT (p. 30)	UltraTax CS Productivity Tools new Carlisle SK (p. 21)
FRIDAY	F	1:30 - 3:10 p.m.	100 min	Accounting CS Report Designer: Formatting Financial Statements Hands-on new (2 of 2) Garcia SK (p. 19)	Practice CS Project Management & Workflow Hands-on (2 of 2) Dent SK (p. 23)	UltraTax CS Best Practices Laboratory for SaaS/Virtual Office CS Hands-on new (2 of 2) McQueen SK (p. 22)	Accounting CS Essentials: Accounting Services Hands-on (2 of 2) Harden SK (p. 18)	Business Tax Update new VanDerAa T (p. 29)	What's Cool in Technology These Days Courtney SK (p. 27)	UltraTax/1120 & 1065 Essentials 2 Burgman SK (p. 20)
FRIDAY	G	3:40 - 5:20 p.m.	100 min	Accounting CS Payroll Report Designer: Formatting Payroll Reports Hands-on new (1 of 2) Garcia SK (p. 19)	Accounting CS Essentials: Payroll Services Hands-on (1 of 2) Wiseman SK (p. 18)	Fixed Assets CS Essentials Hands-on new (1 of 2) Burgman SK (p. 22)	Practice CS Project Management & Workflow Hands-on (1 of 2) Ferguson SK (p. 23)	UltraTax CS: What's New new Witherow SK (p. 21)	Best Practices for Implementing Client Portals (Panel) new Root SK (p. 25)	Introducing Workpapers CS, the Newest Addition to the Accounting CS Suite new Gawne SK (p. 20)
SATURDAY	H	8:00 - 9:40 a.m.	100 min	Accounting CS Payroll Report Designer: Formatting Payroll Reports Hands-on new (2 of 2) Garcia SK (p. 19)	Accounting CS Essentials: Payroll Services Hands-on (2 of 2) Wiseman SK (p. 18)	Fixed Assets CS Essentials Hands-on new (2 of 2) Burgman SK (p. 22)	Practice CS Project Management & Workflow Hands-on (2 of 2) Ferguson SK (p. 23)	Practice CS: The Dashboard Tune Up new Zykowski SK (p. 24)	Using Mobile Devices in the Tax & Accounting Profession new Kellerhals SK (p. 27)	UltraTax/1040 Essentials 2 Lillis SK (p. 20)

Session number: 1

Session title: UltraTax CS Setup Essentials

Hands-on class: Hands-on

More than one session is required to complete workshop: (1 of 2)

Workshop is NEW this year: new

Sessions that are part of one workshop are similarly shaded

Instructor: Witherow

Page where workshop is described: (p.x)

CPE field of study: XX

CPE Field of Study Key:

- SK Specialized Knowledge
- T Taxation
- MGT Management

8	9	10	11	12	13	14	15
Tips for Streamlining Your Electronic Filing Process new Johnson SK (p. 21)	Transition from CSA to Accounting CS Lillis SK (p. 18)	FileCabinet CS: Tips for Managing Your Paperless Workflow Leong SK (p. 26)	Best Practices for Implementing Client Portals (Panel) new Root SK (p. 25)	Practice CS Custom Formatting Essentials 1 Ferguson SK (p. 23)	Preparing for a Smooth Year-End—from a Payroll Perspective Paille MGT (p. 29)	GoSystem Tax RS 1065 and 1120 Advanced new Dettling SK (p. 22)	Building a Culture of Firm Optimization Kepczyk MGT (p. 27)
Accounting CS—A User's Journey McCowan MGT (p. 29)	Trial Balance CS and Engagement CS Tax Workflow Dent SK (p. 19)	Virtual Office CS & SaaS for CS Professional Suite Best Practices Kellerhals SK (p. 25)	Establishing Your Firm's Social Media Footprint new Hoeft SK (p. 28)	Practice CS Staff Management Essentials Hill SK (p. 23)	FileCabinet CS: Essentials for the Office Staff McQueen SK (p. 26)	GoSystem Tax RS: New Print System, Transmittal Letters and Filing Instructions... new Carlisle SK (p. 23)	Cool Tools: Business Weapons or Gadgets? new Kepczyk SK (p. 27)
Accounting CS Payroll Essentials 2 and Year End Skills new Teeple SK (p. 19)	What's New in Accounting CS new Wiseman SK (p. 18)	Engagement CS Advanced Tactics new Frigo SK (p. 19)	Managing Your Firm's Online Reputation new Keely SK (p. 28)	Using Practice CS to Grow Your Practice new TBD SK (p. 24)	Building a Niche—Ever Want to Have a Niche Market? new Carmines MGT (p. 31)	GoSystem Tax RS: 10 Things You Wish You Had Known... and Looking Forward to the Future new Dettling SK (p. 23)	Maximizing Practice CS Integration with the CS Professional Suite new Mansfield SK (p. 24)
What Does Your Website Do for You? new Kellerhals MGT (p. 28)	Transitioning FileCabinet CS to the Cloud new Kelley SK (p. 26)	NetClient CS: The Client Experience new Mansfield SK (p. 25)	Your Company's Social Media Plan: How to Measure Success new Perry SK (p. 32)	Jump Starting Your New Staff new Hill MGT (p. 31)	GoFileRoom: What's New new Yeargan SK (p. 26)	GoSystem Tax RS: 1040 Advanced new Carlisle SK (p. 23)	FileCabinet CS: Tips for Archiving and Performance Improvement new Leong SK (p. 26)
Accounting CS Client Access Best Practices new Teeple SK (p. 20)	Transition from CSA to Accounting CS Lillis SK (p. 18)	Firm and Software Setup for Client Portals new Kellerhals SK (p. 25)	The New Grapevine—Social Tools and Tips for Practitioners new Tankersley SK (p. 28)	Practice CS: The Dashboard Tune Up new Zykowski SK (p. 24)	GoFileRoom: Advanced System and FirmFlow Administration Review Frigo SK (p. 26)	Value Pricing—Why it Works and How to Get It Started new Lawhorn MGT (p. 30)	Preparing Your Firm for the Most Complex Payroll new Paille MGT (p. 29)
Accounting CS Client Access Best Practices new Teeple SK (p. 20)	What's New in Accounting CS new Wiseman SK (p. 18)	Bringing Your UltraTax CS Practice Online with NetClient CS new Gawne SK (p. 21)	The New Grapevine—Social Tools and Tips for Practitioners new Tankersley SK (p. 28)	Advanced Features in Practice CS new Johnston SK (p. 24)	Advanced Efficiency with GoFileRoom, FirmFlow, and NetClient CS Portals Yeargan SK (p. 26)	Hire, Retain, and Be the Best Employer: The Top 10 Ingredients for a Superstar new Wiley MGT (p. 32)	Experience the Competitive Edge with Checkpoint Iley SK (p. 30)
Accounting CS—A User's Journey McCowan MGT (p. 29)	Accounting CS Essentials 2: Accounting Services new Rodrigues SK (p. 18)	UltraTax CS Paperless Tax Workflow and Overview Lillis SK (p. 21)	People Skills for Accountants new Leuthner MGT (p. 30)	Practice CS—Client Management new McQueen SK (p. 24)	The Ideal Technology Plan: If Money was not a Factor new Anderson MGT (p. 32)	Change Management: The Key to Taking Your Practice to the Next Level new Wiley MGT (p. 31)	Payroll in Today's Profession new Manning MGT (p. 30)
Tips for Streamlining Your Electronic Filing Process new Johnson SK (p. 21)	FileCabinet CS Source Document Processing Service: It's More Relevant than you Might Think new Anderson SK (p. 32)	FileCabinet CS: Tips for Managing Your Paperless Workflow Leong SK (p. 26)	Advanced Features in Practice CS new Johnston SK (p. 24)	Practice CS Staff Management Essentials Hill SK (p. 23)	Building a Niche—Ever Want to Have a Niche Market? new Carmines MGT (p. 31)	Value Pricing—Why it Works and How to Get It Started new Lawhorn MGT (p. 30)	Optimizing Software Integration in the CS Professional Suite and Beyond Skworonek SK (p. 27)

ACCOUNTING

WHAT'S NEW IN ACCOUNTING CS *new*

Join us to see how the next evolution in accounting software applies relevant technologies to help your firm save time, increase profitability, and enhance process efficiencies. As the newest accounting platform for the CS Professional Suite, Accounting CS offers unprecedented collaboration between firm and client, exceptional workflow customization, and much more. You'll receive an overview of recently added features as well as insight into future development plans for the platform's four major components: Accounting CS, Accounting CS Payroll, Accounting CS Client Access, and Accounting CS Workpapers. We'll explore some of the many new features available, including accounts receivable functionality, advanced options in data entry and bill payment, advanced payroll calculations, workpaper management, and more. We'll also discuss other new features that you can expect to see in Accounting CS in the coming year.

Level: Basic
Lecture (100 minutes)
Instructor: Mark Wiseman, Thomson Reuters
Session: C9 or F9

TRANSITION FROM CSA TO ACCOUNTING CS

This workshop is your first step toward successfully transitioning to Accounting CS from CS Professional Suite Accounting (CSA). We'll discuss in detail the conversion process, helpful transition resources, and post conversion verification of client data in Accounting CS for both accounting and payroll services. We'll also cover the key differences in process and workflow between CSA and Accounting CS, as well as basic navigation and reporting capabilities that allow you to create and modify standard reports and financial statements.

Level: Basic
Lecture (100 minutes)
Instructor: Chris Lillis, Thomson Reuters
Session: A9 or E9

ACCOUNTING

ACCOUNTING CS ESSENTIALS: ACCOUNTING SERVICES

We'll focus on the basics of Accounting CS. You'll have the opportunity to walk through the program, update the Accounting CS database with new client data, view and modify the trial balance grid, and execute procedures for data entry and closing the period. We'll also highlight process and workflow functions that will make your firm more efficient and reduce the time spent on each client. You'll leave feeling comfortable with new client setup and navigation through the software.

Level: Basic
Hands-On (200 minutes)
Instructor: John Harden, Thomson Reuters
Session: A4 & B4 or E4 & F4

ACCOUNTING CS ESSENTIALS 2: ACCOUNTING SERVICES *new*

We'll go beyond the basics to demonstrate the powerful, more intricate features of Accounting CS. You'll see how to use impressive, timesaving features such as setting up transaction templates and automatic calculations, integration with UltraTax CS and Fixed Assets CS®, consolidating clients, complex chart of accounts setup on clients with department/location needs, and more. You should have attended *Accounting CS Essentials: Accounting Services* or have a working knowledge of Accounting CS.

Level: Intermediate
Hands-On (100 minutes)
Instructor: Dan Rodrigues, Thomson Reuters
Session: G9

ACCOUNTING CS ESSENTIALS: PAYROLL SERVICES

This hands-on workshop will focus on the payroll capabilities of Accounting CS. We'll navigate through the payroll-specific setup, update the Accounting CS database with new client and employee data, perform payroll check entry, and review tax processing. We'll also highlight best practices that will make your payrolls more accurate and reduce the time spent on each client. This session will provide participants with a solid foundation, leaving you feeling confident in your ability to provide payroll services with Accounting CS.

Level: Basic
Hands-On (200 minutes)
Instructor: Mark Wiseman, Thomson Reuters
Session: A2 & B2 or G2 & H2

ACCOUNTING

ACCOUNTING CS REPORT DESIGNER: FORMATTING FINANCIAL STATEMENTS *new*

Find out the basics of financial statement preparation with this hands-on workshop. We'll focus on financial statements and gain familiarity with the Accounting CS report designer. You'll get a good overview of the design components for modifying financial statements, and you'll discover how to insert text and variables, use cell and row properties, and report financial ratios. You'll also create departmental and location-based income statements, formulas, and ratios.

Level: Basic
Hands-On (200 minutes)
Instructor: Lisa Garcia, Thomson Reuters
Session: E1 & F1

ACCOUNTING CS PAYROLL REPORT DESIGNER: FORMATTING PAYROLL REPORTS *new*

This hands-on workshop will focus on payroll reports and the formatting capabilities of the Accounting CS report designer. You'll become familiar with the design components for modifying and creating payroll reports, which will include inserting text, variables, the use of cell and row properties, and using formulas to total payroll amounts.

Level: Basic
Hands-On (200 minutes)
Instructor: Lisa Garcia, Thomson Reuters
Session: A1 & B1 or G1 & H1

ACCOUNTING CS PAYROLL ESSENTIALS 2 AND YEAR END SKILLS *new*

This workshop will focus on the more advanced topics of providing payroll services with Accounting CS. You'll see how to set up a client for direct deposit and impounding and how to create invoices from the setup of billing items. We'll also cover timesaving tips and tricks to maximize efficiency when processing payroll forms, verifying accurate payroll totals, and processing W-2, 1099, 94X, and other tax compliance forms. Participants should have attended the *Accounting CS Essentials: Payroll Services* workshop or have a working knowledge of Accounting CS.

Level: Intermediate
Lecture (100 minutes)
Instructor: Jeremy Teeple, Thomson Reuters
Session: C8

ACCOUNTING

ENGAGEMENT CS ADVANCED TACTICS *new*

You'll get advanced techniques for use with Trial Balance CS® and Engagement CS. We'll examine topics like categories for grouping codes and the cash flow worksheet, working with the PPC disclosure library, peer-to-peer networking do's and don'ts for fieldwork, using the PDF exchange viewer, consolidation in Trial Balance CS, working with QuickBooks data, and more. You should have attended *Trial Balance Essentials 1* and *Engagement CS Processing Essentials 1*, or have a working knowledge of the two modules.

Level: Advanced
Lecture (100 minutes)
Instructor: Tony Frigo, Thomson Reuters
Session: C10

TRIAL BALANCE CS AND ENGAGEMENT CS TAX WORKFLOW

In this session, we'll explore how engagement workpapers, research, and reports can be managed together to improve quality control. We'll also look at how engagement templates can be built out by entity and industry type to streamline initial setup and addition of new client engagements. You'll see how to set up tax-based trial balances that include M-1/M-3 entries and see how these balances can be exported right to your tax software to save time. Exports include both business and individual returns and even 1040 Schedules C, E, and F. We'll also show how multiple activities can be transferred if the trial balance includes activity detail for items such as rental real estate, farm activity, or Schedule C businesses. Prerequisites include a working knowledge of Trial Balance CS and Engagement CS.

Level: Advanced
Lecture (100 minutes)
Instructor: Judi Dent, Thomson Reuters
Session: B9

CLIENT ACCOUNTING

ACCOUNTING CS IMPORT FROM QUICKBOOKS PRO

We'll introduce the QuickBooks Pro import capabilities of Accounting CS and Accounting CS Payroll. Discover step-by-step procedures for importing client data into Accounting CS, performing the QuickBooks Pro import, and making modifications to transferred data. Prerequisites include a working knowledge of Accounting CS and QuickBooks Pro.

Level: Intermediate
Hands-On (150 minutes)
Instructor: Jesse LaJoye, Thomson Reuters
Session: **C4 & D4**

ACCOUNTING CS CLIENT ACCESS BEST PRACTICES *new*

This session will focus on the setup and workflow opportunities of Accounting CS Client Access. You'll become familiar with the critical setup steps needed in Accounting CS and NetClient CS, including security setup, and the client's view of processing transactions such as checks, deposits, and journal entries. We'll also demonstrate the immediate effect of client source entry and other information instantly available in Accounting CS, allowing for adjustments and report printing.

Level: Intermediate
Lecture (100 minutes)
Instructor: Jeremy Teeple, Thomson Reuters
Session: **E8 or F8**

WORKPAPERS CS

INTRODUCING WORKPAPERS CS, THE NEWEST ADDITION TO THE ACCOUNTING CS SUITE *new*

This workshop will introduce you to Workpapers CS and demonstrate how the application can streamline your tax and accounting practice. We'll discuss using Workpapers CS to gather, manage, and process workpapers and source documents for streamlining your tax workflow process. We'll describe the advantages of powerful features like digital review, sign-off, proforma, annotation, and integration with Microsoft Excel and Word. We'll also share our future vision for this new and innovative solution.

Level: Basic
Lecture (100 minutes)
Instructor: Tom Gawne, CPA, Thomson Reuters
Session: **A7 or G7**

ULTRATAX CS

ULTRATAX CS SETUP ESSENTIALS *new*

This workshop will explore the fundamental setup options in UltraTax CS and provide a walkthrough of key setup options. It is highly recommended for anyone in your firm who is responsible for general program setup. Topics include configuring the global, firm-wide program settings, preparer and staff information, and data sharing settings; setting user-specific options to customize the program to each staff member's specifications; entering client email addresses, setting return and organizer delivery methods; and modifying/customizing federal entity-specific settings for client documents, invoice pricing, and print conditions.

Level: Basic
Hands-On (150 minutes)
Instructor: Arthur Burgman, Thomson Reuters
Session: **C3 & D3**

ULTRATAX/1040 ESSENTIALS 2

This advanced workshop will show you how to get the most out of the UltraTax/1040 software. Topics include setting up 8615 data sharing and K-1 data sharing of a business return into the individual return. We'll also discuss showing data entry for supplemental business expenses, estimated tax payments, importing spreadsheet items, and running the Filing Status Optimization and Education Optimization reports. This workshop also covers amending a tax return, processing Net Operating Losses, entering multi-state apportionment and much more. Prerequisites include a working knowledge of UltraTax/1040 and/or successful completion of *UltraTax/1040 Essentials 1*.

Level: Advanced
Lecture (100 minutes)
Instructor: Chris Lillis, Thomson Reuters
Session: **C7 or H7**

ULTRATAX/1120 & 1065 ESSENTIALS 2

This workshop provides a walk-through of the options and features for advanced 1120/1065 data entry in UltraTax CS. Topics include integration with general ledger information, data entry requirements for multi-state apportionment, calculating Net Operating Losses, and analyzing Schedule L, M-1, and M-2. We'll also cover data entry for the 1377 election, shareholder and partner basis, and working with change of ownership and specially allocating amounts to specific partners. Prerequisites include a working knowledge of UltraTax/1120 & 1065 and/or successful completion of *UltraTax/1120 & 1065 Essentials 1*.

Level: Advanced
Lecture (100 minutes)
Instructor: Arthur Burgman, Thomson Reuters
Session: **B7 or F7**

ULTRATAX CS

ULTRATAX CS: WHAT'S NEW *new*

Get a jump on next tax season with a preview of several new and powerful system-wide and entity-specific features that will be in this year's UltraTax CS products. We'll explore many of the new features available, including modernized e-filing for individual federal and state returns, redesign of Form 1099-B brokerage data entry for individual returns, and links to external documents, like tax workpapers, at the client level. We'll also discuss other new features that you can expect to see, redesign of the partner data entry for weighted average and transfer of interest, a new return option for corporations to display a zero in the balance sheet fields and statements, addition of the tax return history information for business clients, and the ability to view completed client data in read-only mode. Join us to truly understand how the new release impacts your firm and get the most productivity from your UltraTax CS software.

Level: Overview
Lecture (100 minutes)
Instructor: Therese Witherow, Thomson Reuters
Session: **A5 or C5 or G5**

ULTRATAX CS ADVANCED CLIENT DOCUMENT FEATURES *new*

Have you ever wondered how to customize your client documents? Do you understand what Variables and Print If statements do? This workshop will give you a high-level overview of how to understand and customize your Transmittal Letters, Filing Instructions, Invoices, Election Statements, Slip Sheets, and Mailing Labels. And we'll cover relating input screen fields with Client Documents to further customize your client documents.

Level: Intermediate
Hands-On (150 minutes)
Instructor: Dan Johnson, Thomson Reuters
Session: **C1 & D1**

BRINGING YOUR ULTRATAX CS PRACTICE ONLINE WITH NETCLIENT CS *new*

Gain insight on using portals to offer your clients advanced online tax preparation and tax delivery services. We'll show you how portal technology can make electronic delivery of client organizers fast and easy and how simple it is for clients to retrieve and enter tax information via portals. And we'll show you how to retrieve organizers, workpapers, and source documents from the client to complete the tax return and then post the finished return—with any actionable items—to the portal for immediate access by the client.

Level: Intermediate
Lecture (100 minutes)
Instructor: Tom Gawne, CPA, Thomson Reuters
Session: **F10**

ULTRATAX CS

TIPS FOR STREAMLINING YOUR ELECTRONIC FILING PROCESS *new*

This workshop will help you prepare for the upcoming e-filing season and take your e-filing to the next level of efficiency. We'll cover timesaving features for e-filing and examine how to master the art of correcting e-file rejections. You'll walk through the EFView tool that enables you to view and cross-reference information included in an e-file, and you'll see how to use IRS and Thomson Reuters e-filing resources. These features will help you streamline your e-filing processes and grow the e-filing arm of your practice.

Level: Advanced
Lecture (100 minutes)
Instructor: Dan Johnson, Thomson Reuters
Session: **A8 or H8**

ULTRATAX CS PAPERLESS TAX WORKFLOW AND OVERVIEW

This fast-paced workshop will demonstrate UltraTax CS tax return workflow tools that can streamline the entire return process. Topics covered include the use of Web Client Organizers, data sharing (including the Source Data Entry module), e-filing, integration with Source Data Processing (OCR) and FileCabinet CS, and web delivery.

Level: Overview
Lecture (100 minutes)
Instructor: Chris Lillis, Thomson Reuters
Session: **G10**

ULTRATAX CS PRODUCTIVITY TOOLS *new*

There's more to UltraTax CS than entering data to complete a client's tax return. You'll discover the built-in tools in UltraTax CS that will save you more time next tax season. Using the client status system, you'll see how to maximize your firm's workflow process and track efficiency seamlessly. You'll also see how to use data mining to easily identify specific audiences within your client base for special services, announcements, etc. From Practice CS integration to Home Page utilization, if you haven't given yourself the time to investigate these timesaving features, this workshop is for you. These underutilized productivity tools can make a significant difference in time management when you need it most.

Level: Intermediate
Lecture (100 minutes)
Instructor: Kelly Carlisle, Thomson Reuters
Session: **E7**

ULTRATAX CS

ULTRATAX CS PARTNER REVIEW AND PLANNING TOOLS new

UltraTax CS partners with preparers to provide powerful review tools that can be used to track return data, ensure accuracy, and review returns seamlessly. These tools include diagnostics, tickmarks, field and client notes, and the ability to view prior year data. You'll discover how to attach text to a return, find and request missing data, and review reports calculated by UltraTax CS for both individual and business entities. With UltraTax CS, you have the opportunity to add high-value tax planning services to your firm's service portfolio. See these tools and how they can assist you in reviewing a client's return and offering tax-planning advice.

Level: Intermediate
Hands-On (100 minutes)
Instructor: Calvin Leong, Thomson Reuters
Session: **B3**

FIXED ASSETS CS ESSENTIALS new

Explore the basic and advanced features available in this asset management program. We'll discuss client setup, defining client-specific options, building treatments, data entry of amortized and listed property assets, vehicle and home office assets, and examples of electing Section 179 expense. We'll also examine how to import asset data from a Microsoft Excel spreadsheet, dispose of assets, add print profiles, and create custom reports.

Level: Intermediate
Hands-On (200 minutes)
Instructor: Arthur Burgman, Thomson Reuters
Session: **G3 & H3**

PLANNER CS® & TOOLBOX CS® ESSENTIALS new

Are you taking full advantage of the many powerful features in Planner CS and ToolBox CS? 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 (50 minutes)
Instructor: Anna Skowronek, Thomson Reuters
Session: **D7**

ULTRATAX CS

ULTRATAX CS BEST PRACTICES LABORATORY FOR SAAS/VIRTUAL OFFICE CS new

Uncover overlooked tools that can speed your productivity and eliminate the pain points within UltraTax CS, while processing in a Virtual Office CS or SaaS for CS Professional Suite environment. Our best practices have been pulled from tax and accounting firms with proven success using UltraTax CS. You'll see how to implement these practices in your SaaS/Virtual Office CS version of UltraTax CS, and you'll be surrounded by UltraTax CS specialists that will provide counsel. Come prepared for an open discussion on setup, review, delivery, research, maintenance, and more. Prerequisites include a working knowledge of UltraTax CS and operating in a SaaS/Virtual Office CS environment.

Level: Intermediate
Hands-On (200 minutes)
Instructor: Andre McQueen, Thomson Reuters
Session: **E3 & F3**

ULTRATAX/1040: GEMS & TIPS FROM A HIGH VOLUME USER

Got UltraTax/1040? This session will focus almost exclusively on the features of UltraTax/1040 that allow you to be as efficient as possible. High volume user and practicing accountant Lloyd Leuthner will share information and useful gems about setup, status, and favorite reports that prevent problems. Some tips will save you money, and others will save you valuable time. Anything that has to do with UltraTax/1040 is fair game for this session. Consider bringing your own laptop to connect to your live data and test some of the useful tips during the session. This class will move quickly, so it's a good idea to have at least two tax seasons' worth of experience with UltraTax/1040.

Level: Overview
Lecture (100 minutes)
Instructor: Lloyd Leuthner, CPA, Leuthner Tax and Financial
Session: **B5**

GOSYSTEM® TAX RS

GOSYSTEM TAX RS 1065 AND 1120 ADVANCED new

Let's take your GoSystem Tax RS experience to the next level. In this class, you'll see best practices for e-filing business returns, including clearing diagnostics and using the e-file viewer. We'll also review best practices for 1120 consolidations, including a brief look at state combined returns. Lastly, we'll take a look at using the various import/export templates available to you, as well as how to create your own template.

Level: Advanced
Lecture (100 minutes)
Instructor: Heather Dettling, Thomson Reuters
Session: **A14**

GOSYSTEM TAX RS

GOSYSTEM TAX RS: 1040 ADVANCED *new*

Several changes in recent reporting and filing requirements have been challenges. We'll review federal modernized e-file, state e-file issues, GO TO functionality, clearing diagnostics and XML validation errors, and using the e-file viewer. We'll also look at how to get the Form 3800 and related credits to flow throughout the return, common issues for Schedules C and E, and options for maximizing the Married Filing Joint vs. Married Filing Separate statuses.

Level: Intermediate
Lecture (50 minutes)
Instructor: Kelly Carlisle, Thomson Reuters
Session: **D14**

GOSYSTEM TAX RS: NEW PRINT SYSTEM, TRANSMITTAL LETTERS AND FILING INSTRUCTIONS MODULE, AND BROWSER UPDATES *new*

As we continue to move our 1040, 1120, and 1065 applications forward, we're updating our print system to maximize your productivity while you work on returns. See the advantages and tricks to make the most of the changes. We're also adding new transmittal letter and filing Instructions functionality to give you a more efficient and effective mechanism to create and maintain client-facing tax return communications. And we'll explore the updates to the browser experience and changes to batch functionality.

Level: Basic
Lecture (100 minutes)
Instructor: Kelly Carlisle, Thomson Reuters
Session: **B14**

GOSYSTEM TAX RS: 10 THINGS YOU WISH YOU HAD KNOWN…AND LOOKING FORWARD TO THE FUTURE *new*

If you've ever needed to reach out to another user or Support for answers on how to force or suppress a form from printing or what checkbox or option to mark when you can't get something to work, then this workshop is for you. We'll cover the top questions that come into support for 1040, 1065, and 1120 applications. You'll also see the best ways to use some of the timesaving tools. Then we'll take a sneak peek at what's new for the tax year 2012 applications.

Level: Advanced
Lecture (100 minutes)
Instructor: Heather Dettling, Thomson Reuters
Session: **C14**

PRACTICE CS

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. We'll also discuss how automated notifications can assist your staff with the routing and completion of any firm project.

Level: Intermediate
Hands-On (200 minutes)
Instructor: J. Dent or T. Ferguson, Thomson Reuters
Session: **E2 & F2 or G4 & H4**

PRACTICE CS STAFF MANAGEMENT ESSENTIALS

We'll demonstrate how you can use the Staff Management module in Practice CS to manage vacation schedules, track benefits, and monitor the workload of your staff. This is a must-attend workshop—join us and see how your firm can benefit from this powerful module, which gives you an ongoing snapshot of staff performance.

Level: Basic
Lecture (100 minutes)
Instructor: Will Hill, Thomson Reuters
Session: **B12 or H12**

PRACTICE CS CUSTOM FORMATTING ESSENTIALS 1

This workshop covers custom formatting and creating custom invoices and letters. We'll discuss identifying design concepts of custom formats, the Practice CS Library, useful formatting tools, and creating custom invoices and letters from existing templates.

Level: Basic
Lecture (100 minutes)
Instructor: Trumaine Ferguson, Thomson Reuters
Session: **A12**

PRACTICE CS CUSTOM FORMATTING ESSENTIALS 2

This hands-on course covers identifying design concepts of custom formats, distinguishing between If Expressions and Print-When formulas, and much more. We'll discuss when properties are to be used in formulas and how to apply system formulas. Prerequisites include *Practice CS Custom Formatting Essentials 1* or a general understanding of Practice CS setup and custom formats.

Level: Intermediate
Hands-On (150 minutes)
Instructor: Noel Zykowski, Thomson Reuters
Session: **C2 & D2**

PRACTICE CS

PRACTICE CS: THE DASHBOARD TUNE-UP *new*

As a Practice CS user, you know first-hand that the program's dashboards can be customized to meet your particular needs. But are you getting the most out of your dashboards? We'll give you a more advanced view of the dashboards in Practice CS and help you re-evaluate your usage to be sure you're maximizing their full potential. We'll share a number of tips, tricks, and best practices for dashboard usage. Participants should already be using Practice CS.

Level: Intermediate
Lecture (100 minutes)
Instructor: Noel Zykowski, Thomson Reuters
Session: **E12 or H5**

USING PRACTICE CS TO GROW YOUR PRACTICE *new*

We'll look beyond the basics of Practice CS and time and billing functionality to some of the powerful firm and client management tools available to you today. Join us for a fast-paced discussion with a practitioner on the ways Practice CS is used and configured to support client-focused initiatives for bringing in new business to build the firm. We'll also cover optimum setup of Practice CS, use of the Client Management module to provide exceptional client service, and how to use the system to track progress of new initiatives for the firm. This session is geared toward firms who've been using Practice CS for at least one year.

Level: Intermediate
Lecture (100 minutes)
Instructor: TBD
Session: **C12**

PRACTICE CS REPORT AND INVOICE FORMAT LABORATORY *new*

This exciting new class style will allow you to take the results of your experience back to your firm and put them to use right away. First, you'll listen to a 20-minute lecture on the custom formatting tool functions. During the next 40 minutes, you'll be able to experiment with and practice the concepts shown with the instructor's assistance. Then you'll export your formats to a USB drive, so they're ready to take back and import into your firm's database. Come prepared with an idea of your desired report and/or invoice designs and a USB drive to take completed work back to the office.

Level: Intermediate
Hands-On (100 minutes)
Instructor: Noel Zykowski, Thomson Reuters
Session: **A3**

PRACTICE CS

PRACTICE CS - CLIENT MANAGEMENT *new*

We'll demonstrate how you can use the Client Management module in Practice CS to manage your client and prospect interactions like phone calls, phone messages, notes, and emails. We'll cover the best practices for setting up client and prospect contact information to streamline mailings. And we'll explore ways to use the Client Management module for your firm's marketing and referral tracking. This must-attend workshop will show you how to use the Client Management module of Practice CS to keep client and new business information in one central location.

Level: Basic
Lecture (100 minutes)
Instructor: Andre McQueen, Thomson Reuters
Session: **G12**

ADVANCED FEATURES IN PRACTICE CS *new*

Take Practice CS to the next level in this workshop. We'll demonstrate how to improve your efficiencies and streamline your processes with file transfers, Mobile CS, credit card payments, and sending invoices to portals. We'll also explore using fields choosers, custom filters, and custom fields for optimal program usage.

Level: Advanced
Lecture (100 minutes)
Instructor: Christie Johnston, Thomson Reuters
Session: **F12 or H11**

MAXIMIZING PRACTICE CS INTEGRATION WITH THE CS PROFESSIONAL SUITE *new*

We'll explore invoicing from UltraTax CS and CS Professional Suite Accounting and integrating those invoices into Practice CS to reduce duplicate data entry. We'll cover creating links to your invoices, using the client notes on the dashboards, viewing FileCabinet CS documents, automating the process of putting your Practice CS projects on extension when the client's return is extended in UltraTax CS, and viewing GoFileRoom® documents and MyWork, UltraTax CS return history, and UltraTax CS client complexity.

Level: Intermediate
Lecture (100 minutes)
Instructor: Samantha Mansfield, Thomson Reuters
Session: **C15**

WEB SERVICES

VIRTUAL OFFICE CS & SAAS FOR CS PROFESSIONAL SUITE BEST PRACTICES

We'll cover best practices to help you ensure optimal performance and efficiency in Virtual Office CS and SaaS, 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: Basic
Lecture (100 minutes)
Instructor: Christina Kellerhals, Thomson Reuters
Session: **B10**

BEST PRACTICES FOR IMPLEMENTING CLIENT PORTALS *new*

M. Darren Root, executive editor of the *CPA Practice Advisor*, CEO of RootWorks, and longtime portal user, will lead a panel discussion to introduce the best practices for implementing client portals in an accounting firm. Focusing on proven and tested practices, Darren will cover how to sell portals to clients, managing a large number of portals, and general workflow. He'll also highlight what's new in the latest release of NetClient CS.

Level: Overview
Panel (100 minutes)
Moderator: M. Darren Root, CPA.CITP, RootWorks, LLC
Session: **A11 or G6**

FIRM AND SOFTWARE SETUP FOR CLIENT PORTALS *new*

If you're just entering the client portal space, this session is for you. Hear about NetFirm CS™, the overall platform for web services in the CS Professional Suite and all the setup flexibility available. In addition to discussing marketing portals to staff internally and training them, we'll show you options within web-specific administration and options for integrating other CS Professional Suite applications to help you get started. To benefit the most, a familiarity with the client portal options available is recommended. If you're unsure, attend a *NetClient CS Portals: More Than Document Delivery* product demo. We also recommend attending the *NetClient CS: The Client Experience* workshop for more in-depth discussion on communicating portals to your clients.

Level: Basic
Lecture (100 minutes)
Instructor: Christina Kellerhals, Thomson Reuters
Session: **E10**

WEB SERVICES

NETCLIENT CS: THE CLIENT EXPERIENCE *new*

For successful implementation, it's helpful for your clients to understand the many benefits of using NetClient CS client portals and know how to use them. We'll discuss how to select modules and services your clients will find useful, ideas on training, and notifying clients of your new service. You'll see how to create a communication and web presence to introduce clients to portals in a simple, impactful way. If you haven't begun setting up NetClient CS, we recommend taking *Firm and Software Setup for Client Portals* to have the knowledge necessary for implementation.

Level: Basic-Intermediate
Lecture (50 minutes)
Instructor: Samantha Mansfield, Thomson Reuters
Session: **D10**

DOCUMENT MANAGEMENT

FILECABINET CS: TIPS FOR MANAGING YOUR PAPERLESS WORKFLOW

This workshop is for FileCabinet CS users who use the software for paperless processing or who would like tips for making the paperless office more efficient. We'll explore common FileCabinet CS tips, processes, and user experiences in a question-and-answer environment. A working knowledge of FileCabinet CS is recommended.

Level: Advanced
Lecture (100 minutes)
Instructor: Calvin Leong, Thomson Reuters
Session: **A10 or H10**

FILECABINET CS: ESSENTIALS FOR THE OFFICE STAFF

Get the steps and information that staff needs to begin using FileCabinet CS in the office on a daily basis. Topics include integration with the CS Professional Suite, Microsoft Office Suite®, and other Windows applications, scanning and embedding documents, manipulating documents in FileCabinet CS, and delivering documents to clients.

Level: Basic
Lecture (100 minutes)
Instructor: Andre McQueen, Thomson Reuters
Session: **B13**

TRANSITIONING FILECABINET CS TO THE CLOUD *new*

Considering a move to Virtual Office CS or SaaS and already using FileCabinet CS in your local environment? We'll discuss best practices for transitioning your data and managing your firm processes during the transition. Already transitioned? We'll also cover nuances specific to using FileCabinet CS in the cloud, including gathering local electronic data through the FileCabinet CS Virtual Office CS print driver and through embedding local documents, scanning paper documents efficiently, and email considerations specific to the Virtual Office CS/SaaS environment.

Level: Intermediate
Lecture (50 minutes)
Instructor: Paul Kelley, Thomson Reuters
Session: **D9**

DOCUMENT MANAGEMENT

FILECABINET CS TIPS FOR ARCHIVING AND PERFORMANCE IMPROVEMENT *new*

Over time, your FileCabinet CS drawers can become filled with older or unused documents. This workshop will highlight best practices on archiving for increasing performance within FileCabinet CS, including creating, deleting, restoring, and appending archives. You'll understand what happens to your documents when they are archived, and why you should archive certain documents.

Level: Intermediate
Lecture (50 minutes)
Instructor: Calvin Leong, Thomson Reuters
Session: **D15**

GOFILEROOM: WHAT'S NEW *new*

Get a jump on busy season and discover all the new features and enhancements that have been incorporated into the latest version of GoFileRoom. You'll see how the new release impacts your firm, and how you can get the most productivity out of your GoFileRoom software.

Level: Overview
Lecture (50 minutes)
Instructor: Greg Yeargan, Thomson Reuters
Session: **D13**

ADVANCED EFFICIENCY WITH GOFILEROOM, FIRMFLOW, AND NETCLIENT CS PORTALS

Discover the advanced features, tips, and tricks for GoFileRoom and FirmFlow™. We'll cover the most efficient ways to add, search, and work with documents and workflows, as well as the best practice use of ClientFlow™ on the NetClient CS client portal to send and receive documents to and from your end clients.

Level: Advanced
Lecture (100 minutes)
Instructor: Greg Yeargan, Thomson Reuters
Session: **F13**

GOFILEROOM: ADVANCED SYSTEM AND FIRMFLOW ADMINISTRATION REVIEW

This workshop will give you a high-level overview of the advanced administrative features in GoFileRoom and FirmFlow. We'll cover best practices for managing users/groups and permissions, security access, managing indexes and bookmarks, administrative reports, managing and creating workflows, and FirmFlow configuration.

Level: Advanced
Lecture (100 minutes)
Instructor: Tony Frigo, Thomson Reuters
Session: **E13**

TECHNOLOGY

WHAT'S COOL IN TECHNOLOGY THESE DAYS

New technology appears every day, 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: Overview
Lecture (100 minutes)
Instructor: Craig Courtney, Thomson Reuters
Session: F6

USING MOBILE DEVICES IN THE TAX & ACCOUNTING PROFESSION *new*

Mobile devices are everywhere and are fast becoming an important tool in today's tax and accounting firm. Join us to see how you can use mobile devices in your firm to improve efficiency and client service. We'll discuss many of the current mobile devices available and how they can be applied in your firm. We'll also cover allowing staff to use personal mobile devices with firm resources, security considerations of mobile devices, specific applications useful to tax and accounting firms, and more.

Level: Basic
Lecture (100 minutes)
Instructor: Christina Kellerhals, Thomson Reuters
Session: C6 or H6

OPTIMIZING SOFTWARE INTEGRATION IN THE CS PROFESSIONAL SUITE AND BEYOND

This workshop will cover the many possibilities of CS Professional Suite integration and how to make it work best for you and your firm. We'll discuss some best practices for workflow in the office between (but not limited to) Practice CS, UltraTax CS, and NetClient CS. We'll also offer suggestions on setting up the system and processes for maximizing integration.

Level: Basic
Lecture (100 minutes)
Instructor: Anna Skowronek, Thomson Reuters
Session: H15

TECHNOLOGY

BUILDING A CULTURE OF FIRM OPTIMIZATION

Learning is the last and greatest competitive advantage available to firms today. And your firm's ability to identify, optimize, and standardize best practices as an integral part of your firm culture will determine future success. But it doesn't happen by accident. We'll take you through the Firm Process Optimization process used by hundreds of accounting firms to strategically manage their adoption of best practices, including identifying the optimum technology team, creating a technology plan, and monitoring progress with a budget and industry benchmarks. We'll also cover the latest tools and techniques to maximize your learning efforts to build a culture of firm optimization.

Level: Overview
Lecture (100 minutes)
Instructor: Roman Kepczyk, CPA.CITP, Xcentric
Session: A15

COOL TOOLS: BUSINESS WEAPONS OR GADGETS? *new*

Information technology significantly impacts every part of your business. And with the right tools, applications, and processes, your firm can be more effective and profitable than ever. You'll see the latest business weapons that should be in your firm today and some gadgets that will have you wondering how they even got off the drawing board. In a lively and entertaining format, we'll separate the hype from the really useful, while presenting the technology of today and tomorrow.

Level: Overview
Lecture (100 minutes)
Instructor: Roman Kepczyk, CPA.CITP, Xcentric
Session: B15

KILLER APPS FOR THE IPAD

Looking for all the right business points to justify why your firm should spot you an Apple iPad®? We'll cover the top apps and must-have peripherals for the iPad. And more importantly, you'll leave with the leverage you'll need to get your hands on a shiny new iPad.

Level: Overview
Lecture (100 minutes)
Instructor: Christian James, Xcentric
Session: A6

TECHNOLOGY

MANAGING YOUR FIRM'S ONLINE REPUTATION *new*

With the invention of the Internet and the advent of social media, the days of top-down messaging are over. It's never been more important to start making the shift to a personal brand and get away from the brochure-based branding produced by many professional service firms. We'll give you practical guidance regarding your firm's online reputation and show you how to start building a brand fit for today's marketplace.

Level: Overview
Lecture (100 minutes)
Instructor: Roy Keely, Xcentric
Session: **C11**

ESTABLISHING YOUR FIRM'S SOCIAL MEDIA FOOTPRINT *new*

For all the commotion over social media, there's surprisingly little concrete, reliable information out there on what it can do for your business—and even less guidance on how to make it work for you. If you're just dipping your toe into the Facebook, Twitter, and LinkedIn pool for the first time, join social media and web marketing director Bryan Hoeft as he brings you the guidance you've been looking for. He'll touch on the evolution of social media, offer step-by-step plans for putting social media to work in an accounting firm, and show examples from other firms.

Level: Basic
Lecture (100 minutes)
Instructor: Bryan Hoeft, Thomson Reuters
Session: **B11**

THE NEW GRAPEVINE—SOCIAL TOOLS AND TIPS FOR PRACTITIONERS *new*

Social networking has changed the way we all do business. While there are lots of courses that tell you why you should be social and what social networking is, there are few that cover the tactical side. Or, as Eric Clapton said, "It's in the way that you use it." We'll discuss methods for measuring and monitoring your social networking impact, including analytical tools, online services, and alerts. We'll also discuss strategies for managing an editorial calendar and coaching staff to create the content so partners can focus their efforts on selling, closing, and serving clients.

Level: Overview
Lecture (100 minutes)
Instructor: Brian Tankersley, CPA.CITP, K2 Enterprises
Session: **E11 or F11**

TECHNOLOGY

WHAT DOES YOUR WEBSITE DO FOR YOU? *new*

It's not enough anymore to just have a website; you must have a relevant website that engages your clients. Take a look at your current website. If you don't feel engaged, then this workshop is for you. See how to make your site the hub for your clients and prospective clients with easily available technology like financial calculators, client portal integration, newsletters, and other dynamic content.

Level: Overview
Lecture (50 minutes)
Instructor: Christina Kellerhals, Thomson Reuters
Session: **D8**

TAX

INDIVIDUAL TAX UPDATE *new*

We'll cover individual tax changes in 2012. And we'll address new legislation, IRS regulations, rulings, and cases, together with significant 2012 form changes. Special attention will be paid to many expired and expiring tax cuts to help you cope with the uncertainty of year end tax planning.

Level: Overview
Lecture (100 minutes)
Presenter: Douglas J. VanDerAa, CPA, JD,
Federal Tax Workshops, East Lansing, MI
Session: **E5**

BUSINESS TAX UPDATE *new*

This workshop offers the latest information on the business-related provisions of 2012 tax legislation, IRS regulations, rulings, and cases dealing with corporations, partnerships, and S corporations. We'll also cover depreciation developments, new capitalization of tangible property regulations, and more.

Level: Overview
Lecture (100 minutes)
Presenter: Douglas J. VanDerAa, CPA, JD,
Federal Tax Workshops, East Lansing, MI
Session: **F5**

PRACTICE MANAGEMENT

ACCOUNTING CS—A USER'S JOURNEY

Simplicity. Google has it with search, Apple has it with the iPhone® and iPad, and now Thomson Reuters has it with Accounting CS and the concept of total client software integration. Hear how one tech-savvy firm has adopted Accounting CS and is moving forward with the efficiencies of total client integration. Listen to the real-life story of the firm's Accounting CS implementation, and see why your firm should be looking to the future with Accounting CS.

Level: Overview
Lecture (100 minutes)
Instructor: Ryan McCowan, CPA.CITP,
Greene & McCowan, CPAs
Session: **B8 or G8**

PREPARING FOR A SMOOTH YEAR END—FROM A PAYROLL PERSPECTIVE

Get tips on how to make year-end processes more effective, efficient, and compliant. We'll discuss changes in Social Security, new SSA initiatives, tips for reconciling payroll accounts, I-9 regulations (new hire reporting, pay practices, escheat rules, fringe benefit reporting requirements, and federal unemployment) with respect to deficit states, and third-party sick pay and its impact on payroll. We'll also cover the latest federal and state payroll changes for 2012, SUTA limits for 2012, and 53/27 week.

Level: Overview
Lecture (100 minutes)
Instructor: Jim Paille, Thomson Reuters
Session: **A13**

PREPARING YOUR FIRM FOR THE MOST COMPLEX PAYROLL *new*

This workshop covers the most complex and convoluted topics faced by payroll providers today. And it's designed specifically for payroll providers looking to expand their payroll knowledge and be aware of the most challenging payroll situations. We'll cover the Health Care Affordability Act and its impact on payroll today; multi-state taxation (i.e. withholding and SUI doing business in multiple states); termination pay: voluntary vs. involuntary; local taxes: mandatory vs. courtesy; impounding and funding: firm and service advantages; and more. Other topics and participant questions will be welcomed. This advanced class requires a general understanding of payroll tax compliance.

Level: Advanced
Lecture (100 minutes)
Instructor: Jim Paille, Thomson Reuters
Session: **E15**

PRACTICE MANAGEMENT

PAYROLL IN TODAY'S PROFESSION *new*

Are you looking to get serious about offering payroll services? Hear from a leader in the payroll industry, as we look at the emerging opportunity with payroll services, along with specific details on how to start, grow, and manage your payroll services. Topics include assessing the opportunity, the payroll workflow, staffing, marketing payroll services, and cross selling your traditional services.

Level: Overview

Lecture (100 minutes)

Instructor: R. Sean Manning, CPA, Payroll Vault, Owner – Manager, Manning & Company PC, Owner

Session: **G15**

EXPERIENCE THE COMPETITIVE EDGE WITH CHECKPOINT

Checkpoint, the top centralized, integrated, and customizable online research service, provides complete access to tax laws, expert analysis, practitioner insights, news, cases, productivity tools, and more. 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 (100 minutes)

Instructor: Shawn Iley, Thomson Reuters

Session: **F15**

VALUE PRICING—WHY IT WORKS AND HOW TO GET IT STARTED *new*

Value pricing is definitely more than a fad. It's a necessity for any technologically integrated accounting firm. Many firms continue to use the old hours-times-rate method, even where technology and integrated systems promote a more efficient, effective workflow and improved productivity, ultimately resulting in enhanced profitability. Hear from a firm that has used value pricing successfully since 2003, and find out how and why value pricing works. Jason Lawhorn developed his firm's first Value Pricing Agreement™ in 2003. The Lawhorn approach is unique, and Jason will demonstrate how you too can get started value pricing in your own practice. Even if you're already value pricing in some form, you'll get some great ideas and tools from this class.

Level: Overview

Lecture (100 minutes)

Instructor: Jason Lawhorn, CPA.CITP, MAcc, Lawhorn CPA Group, Inc.

Session: **E14 or H14**

PRACTICE MANAGEMENT

BUILDING A MARKETING STRATEGY AROUND A DEFINED BUSINESS MODEL TO GROW YOUR PRACTICE AND INCREASE PRACTICE VALUE *new*

Darren will discuss the need for creating a defined business model so you can clearly articulate your firm's value proposition to existing and potential new clients. You'll see how to create a consistent brand strategy that encompasses your web presence, social media, print material, and digital marketing. We'll also discuss how you can use Practice CS and Constant Contact® to market to the type of clients you want to grow your practice.

Level: Overview

Lecture (100 minutes)

Instructor: M. Darren Root, CPA.CITP, RootWorks, LLC

Session: **B6 or E6**

PEOPLE SKILLS FOR ACCOUNTANTS *new*

We all know life can be stressful, so it's critical to keep our clients' emotional needs in mind at all times as they face unexpected financial challenges. In this session, you'll get a people skills refresher so you'll be better prepared to handle any client scenario effectively. Whether you're helping your clients navigate positive or negative financial changes, having appropriate empathy and listening skills can ensure your clients stay happy and secure. You'll get specific examples of how to deal with some of the most complex and stressful issues your clients or staff may face. And by applying these skills, you can expect more loyal clients, better staff retention, and more successful relationships in all aspects of your life.

Level: Overview

Lecture (100 minutes)

Instructor: Lloyd Leuthner, CPA, Leuthner Tax and Financial

Session: **G11**

DATA MINING: HOW TO MASTER THIS EFFICIENT AND EFFECTIVE TOOL *new*

In this informative session, you'll hear a "from the trenches" perspective from a practitioner and UltraTax CS user, who will show you some powerful ways to use the free data mining utility in UltraTax CS. You'll see how he's used data mining to increase off-season revenue by $20,000, simply by charging for the previously free audit protection service. You'll also see how he's used data mining to determine which clients would be most suitable for a pre-suggested appointment, reducing incoming phone calls by 15% and increasing revenue by 13%. You'll also see how to export calendar data from UltraTax CS to Outlook via Excel. Don't miss this opportunity to see how to take full advantage of your most valuable asset—your data.

Level: Overview
Lecture (50 minutes)
Instructor: Lloyd Leuthner, CPA, Leuthner Tax and Financial
Session: **D5**

BUILDING A NICHE—EVER WANT TO HAVE A NICHE MARKET? *new*

Rob Carmines has targeted the niche market of dental arts clients. He'll discuss: why a niche; what factors to consider in picking a niche; where do you begin; how long does it take; and is the grass really greener? Rob is about halfway toward his goal of having a turnkey solution, which is efficient, profitable, and easy to implement (comparably anyway). He'll also discuss the side issues such as marketing, what to do about your old clients, and what kind of budget should you set.

Level: Overview
Lecture (100 minutes)
Instructor: Rob Carmines, MST, CFP®, CPA, Carmines, Robbins & Company, PLC
Session: **C13 or H13**

PRACTICE MANAGEMENT

JUMP STARTING YOUR NEW STAFF *new*

While your new staff is excited about their new job, you're often curious and anxious. You've made a significant investment in time and money, and you want to maximize that investment. We'll discuss what it takes to set your new staff up for success and capitalize on their excitement for the job. From expectation setting to the training plan, we'll cover what it will take to establish a system of getting the most out of your new hires faster, while minimizing their frustrations. Caution: an internal culture shift may be heading your firm's way after this course.

Level: Basic
Lecture (50 minutes)
Instructor: Will Hill, Thomson Reuters
Session: **D12**

CHANGE MANAGEMENT: THE KEY TO TAKING YOUR PRACTICE TO THE NEXT LEVEL *new*

Great progress begins with change. And firms today are excited about looking at the future, but a bright future requires change to happen at all levels. We'll discover the process for transforming your culture, setting realistic expectations, holding yourself and your team accountable, solidifying trust, and ultimately growing the firm. Does this sound difficult? Not when you have the right knowledge and road map to navigate through the change. You'll leave with the power to develop that roadmap and drive your team to success. We'll cover: how the way your firm handles change will define your culture; higher level change acceptance = higher level results; how change and accountability go hand in hand; how 10x growth is possible, but not if you ignore necessary change; why it's all about trust; and more.

Level: Overview
Lecture (100 minutes)
Instructor: Sandra Wiley, COO, Boomer Consulting, Inc.
Session: **G14**

PRACTICE MANAGEMENT

HIRE, RETAIN, AND BE THE BEST EMPLOYER: THE TOP 10 INGREDIENTS FOR A SUPERSTAR *new*

We all want to find and retain employees. And ultimately we want each of them to be the best employee. We'll explore the 10 ingredients that make the best of the best firm employees. What characteristics make them the best? How can you cultivate those traits first in yourself, and then in the team that surrounds you? Being a superstar is fun, rewarding, and obtainable for anyone who is willing to learn and change. Don't settle for average. Attend this session to explore the 10 ingredients that superstars possess; a scorecard for determining where you are today; how to create a personal action plan for your development; and how to identify the cultural changes your firm needs to make today.

Level: Overview

Lecture (100 minutes)

Instructor: Sandra Wiley, COO, Boomer Consulting, Inc.

Session: F14

FILECABINET CS SOURCE DOCUMENT PROCESSING SERVICE: IT'S MORE RELEVANT THAN YOU MIGHT THINK *new*

We'll take a look at the FileCabinet CS Source Document Processing solution built on OCR technology, and why it is of benefit to practitioners. You'll see what's being done to make this product more effective and efficient within overall tax preparation workflow. Join us to find out why this solution should be added to your practice toolkit for the upcoming tax season.

Level: Overview

Lecture (100 minutes)

Instructor: John Anderson, CPA.CITP

Session: H9

THE IDEAL TECHNOLOGY PLAN: IF MONEY WAS NOT A FACTOR *new*

Does the monetary budget drive all your decisions about technology? If so, you may be missing out on an opportunity to develop and move your firm forward with technology that can enhance productivity and profits. We'll explore proper technology planning for small, medium, and large firms. We'll also offer suggestions for evaluating the components that go into your firm technology plan to enhance productivity and profitability.

Level: Overview

Lecture (100 minutes)

Instructor: John Anderson, CPA.CITP

Session: G13

PRACTICE MANAGEMENT

YOUR COMPANY'S SOCIAL MEDIA PLAN: HOW TO MEASURE SUCCESS *new*

According to the latest American Express OPEN Small Business Monitor survey, 78% of business executives say social media is critical for success. We'll discuss a step-by-step process for building a strategic social media plan designed for accounting firms to maximize their exposure in social media, while minimizing the time involved. We'll also cover the best ways to reach your clients and look at tools for measuring results to confirm that your time is being well-spent. And we'll explore the best blend of personal and professional online presentation to reach key audiences, attract new business, and solidify existing relationships.

Level: Overview

Lecture (50 minutes)

Instructor: Gail Perry, CPA, Sift Media

Session: D11

ORGANIC GROWTH: HOW TO SELL ACCOUNTING AND TAX SERVICES TO PROSPECTIVE CLIENTS

As a business owner, you probably already know that if you want your business to grow, you have to be able to sell your services to potential clients. Do you regard sales calls as a necessary evil—or as an exciting opportunity to be seized? This workshop will have you looking forward to your next selling opportunity by breaking a sales call down into four easy-to-remember steps that will help you maximize your selling success. We'll also discuss how to identify who needs your services, how to reach these prospects, successful communication and presentations skills, what doesn't work when you're marketing accounting services, and much more.

Level: Overview

Lecture (50 minutes)

Instructor: Todd Steinberg, New Clients Inc.

Session: D6

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