WORKSHOP DESCRIPTIONS ★

DO MORE WITH MORE. SYNERGY 2013

33RD ANNUAL THOMSON REUTERS USERS' CONFERENCE
FOR PROFESSIONAL TAX & ACCOUNTING FIRMS ★ CS.THOMSONREUTERS.COM/UC

PRODUCTS AND SERVICES ★

ACCOUNTING

TRANSITION FROM CSA TO ACCOUNTING CS™

This workshop is your first step toward successfully transitioning your accounting and payroll services to Accounting CS from CS Professional Suite® Accounting (CSA). We'll discuss in detail the conversion process, helpful transition resources, new pre-conversion analysis reports, and post-conversion verification of client data in Accounting CS. 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: A7 or E7

ACCOUNTING CS ESSENTIALS: ACCOUNTING SERVICES

We'll focus on the basics of Accounting CS in this workshop. You'll have the opportunity to walk through the program, update the Accounting CS database with new client setup items, view and modify the trial balance, advance accounting periods, and execute various types of data entry. 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: Brittany Yandura, Thomson Reuters
Session: A1 & B1 or G1 & H1

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. Prerequisites include a working knowledge of Accounting CS and/or successful completion of Accounting CS Essentials: Accounting Services.
Level: Intermediate
Hands-On (150 minutes)
Instructor: Brent Cyr, Thomson Reuters
Session: C1 & D1

ACCOUNTING CS: ADVANCED TOPICS *new*

This lecture-style workshop is intended for experienced Accounting CS users who make full use of all services and features of the accounting platform. We'll cover a wide range of timesaving tips and tricks relevant to delivering all types of accounting services, including the spreadsheet import of transactions and pointers on firm setup, source entry, security, and event tracking features. In addition, we'll highlight advanced features and integration procedures that you may not currently be using, such as amortization schedules in ToolBox CS®.
Level: Advanced
Lecture (100 minutes)
Instructor: Dan Rodrigues, Thomson Reuters
Session: E6

WHAT'S NEW IN ACCOUNTING CS *new*

Join members of our product development team and learn about recently added features in Accounting CS. Also, get a head start on preparing your staff and customers for the new abilities and changes. Several new and powerful options are planned for August 2013. This workshop provides an overview of recently added enhancements, as well as insight into future development. We'll explore some of the many new features available, including individual client backup and restore, advanced payroll workflow features, and more. If you currently use Accounting CS or are considering it for your firm, this workshop is for you.
Level: Basic
Lecture (100 minutes)
Instructor: Kathie Knapp, Thomson Reuters
Session: B7 or G7

ACCOUNTING CS REPORT DESIGNER - FORMATTING FINANCIAL STATEMENTS

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 (150 minutes)
Instructor: Lisa Garcia, Thomson Reuters
Session: E3 & F3

THOMSON REUTERS™

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. You'll receive a solid foundation, leaving you feeling confident in your ability to provide payroll services with Accounting CS.
Level: Basic
Hands-On (200 minutes)
Instructor: Brent Cyr, Thomson Reuters
Session: A2 & B2 or G2 & H2

ACCOUNTING CS™ PAYROLL ESSENTIALS 2 & YEAR END SKILLS

This workshop will focus on the more advanced topics of providing payroll services with Accounting CS. You'll see how to setup a client for direct deposit and impounding, and you'll see how to create invoices from the set up 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. Prerequisites include a working knowledge of Accounting CS and/or successful completion of Accounting CS. Essentials: Payroll Services.
Level: Intermediate
Lecture (100 minutes)
Instructor: Dan Rodrigues, Thomson Reuters
Session: G6

ACCOUNTING CS PAYROLL REPORT DESIGNER - FORMATTING PAYROLL REPORTS

This hands-on workshop will concentrate 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. We'll also display common payroll requests you get from clients' clients, such as grouping department info, displaying deduction items, and other payroll reporting needs.
Level: Basic
Hands-On (150 minutes)
Instructor: Lisa Garcia, Thomson Reuters
Session: C3 & D3

LEVERAGING ENGAGEMENT CS® THROUGHOUT YOUR PRACTICE new

This advanced workshop will help you use the power of Engagement CS for all types of engagements. We'll explore how engagement workpapers and reports can be managed to improve quality control, streamline initial setup, manage tax-based trial balances that include M-1/M-3 entities, and save time through integration like tax export. Prerequisites include a working knowledge of Trial Balance CS® and Engagement CS.
Level: Advanced
Lecture (100 minutes)
Instructor: Mark Wiseman, Thomson Reuters
Session: A14

ENGAGEMENT CS & PPC SMART INTEGRATION new

This deep-level workshop will center on the topics of integrating Engagement CS with PPC's SMART Practice Aid products. You'll see how to setup, manage, and process your audit guidance from within Engagement CS. Additionally, you'll discover quality control processes for integrating features, like step-sign-off diagnostics, practical considerations, printing research from Checkpoint, and synchronized roll-forward. Prerequisites include a working knowledge of Engagement CS.
Level: Intermediate
Lecture (100 minutes)
Instructor: Alison Hearn, Thomson Reuters
Session: C14

WORKPAPERS CS SETUP ESSENTIALS new

Firms without prior use of Accounting CS will gain the most benefit from this workshop, which will focus on the setup process in Workpapers CS. Students will explore basic navigation, firm, staff, and client setup, security, client templates, importing chart of accounts and balances, and mappings. No advance preparation is required.
Level: Basic
Hands-On (150 minutes)
Instructor: Jamie Evory, Thomson Reuters
Session: E1 & F1

WORKPAPERS CS: STREAMLING YOUR TAX WORKFLOW new

This workshop will help you use Workpapers CS to gather, manage, and process your tax workpapers and trial balances. We'll share the advantages of using powerful features like digital review, workpaper proforma, sign-off, annotation, and dynamic integration with Microsoft Excel and Word. No advance preparation is required; however, it will be advantageous to have previously attended Workpapers CS Setup Essentials.
Level: Basic
Lecture (100 minutes)
Instructor: Jamie Evory, Thomson Reuters
Session: B14 or H14

CLIENT ACCOUNTING

ACCOUNTING CS CLIENT ACCESS: SETUP ESSENTIALS new

In this workshop, we'll focus on the setup required to deliver Accounting CS Client Access to your clients. You'll become familiar with the critical steps needed in Accounting CS and NetClient CS®, including firm security setup and the client's staff setup. You'll witness the client's view of processing transactions, such as checks, deposits, A/P, A/R, and journal entries. We'll also demonstrate the immediate effect of client source entry and other info instantly available in Accounting CS, allowing for adjustments and report printing.
Level: Intermediate
Lecture (50 minutes)
Instructor: Dan Rodrigues, Thomson Reuters
Session: D7

THOMSON REUTERS™

ACCOUNTING CS CLIENT ACCESS: LEADING YOUR CLIENTS THROUGH THE CHANGE *new*

This workshop will assist you with transitioning business clients and successfully onboard new clients to Accounting CS Client Access. You'll gain the facts needed to develop a solid transition strategy as your clients transition from small-business accounting software, such as Client Bookkeeping Solution® and QuickBooks®. We'll share best practices surrounding change management, provide marketing collateral to assist you in communications, and discuss new client training aids.

Level: Overview
Lecture (50 minutes)
Instructor: John Harden, Thomson Reuters
Session: F7

CONNECTING ACCOUNTING CS & QUICKBOOKS PRO *new*

We'll introduce the QuickBooks Pro import capabilities of Accounting CS and Accounting CS Payroll in this workshop. And you'll discover the step-by-step procedures for importing and exporting 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: Duncan Walker, Thomson Reuters
Session: E2 & F2

ULTRATAX CS

ULTRATAX CS SETUP ESSENTIALS *new*

Join us to explore the fundamental setup options in UltraTax CS and get a walkthrough of key setup options. This workshop 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 info, status events, and data sharing settings; setting user-specific options to customize the program to each staff member's specifications; entering client email addresses and setting return and organizer delivery methods; and modifying and/or customizing federal, state, and city entity-specific settings for client documents, invoice pricing, and print conditions.

Level: Basic
Hands-On (200 minutes)
Instructor: Trumaine Ferguson, Thomson Reuters
Session: A5 & B5

ULTRATAX/1040 ESSENTIALS 1 *new*

This workshop will walk you through the fundamental basics of entering data for individual returns using UltraTax CS. Topics include adding a client; overview of data entry; entering general info; entering wages and interest data; entering itemized deductions; entering Schedule C and Rental info; and reviewing and delivering returns.

Level: Basic
Hands-On (150 minutes)
Instructor: Trumaine Ferguson, Thomson Reuters
Session: C5 & D5

ULTRATAX/1040 ESSENTIALS 2

In this advanced workshop, you'll see how to get the most out of the UltraTax/1040 software. Topics include data sharing demographic and financial info from the Source Data Entry utility into UltraTax CS, Form 8615 "kiddie tax", and Schedule K-1 data; working with SE health insurance deduction from K-1s, supplemental business expenses, and vacation/rental home activities; entering IRA conversion and recharacterization, QTP distribution, and allocating amounts to states; working with education expenses and HSAs; analyzing the filing status, entering FAFSA, calculating estimated tax payments, and filing extensions; amending a tax return and processing Net Operating Losses (NOLs). Prerequisites include a working knowledge of UltraTax/1040 and/or successful completion of UltraTax/1040 Essentials 1.

Level: Advanced
Lecture (100 minutes)
Instructor: Dan Johnson, Thomson Reuters
Session: B10 or H10

ULTRATAX/1120 & 1065 ESSENTIALS 1 *new*

We'll walk you through the fundamental basics of entering data for 1120C, 1120S, and 1065 returns using UltraTax CS. Topics in this workshop include adding a client; overview of data entry; entering general info; entering income and deductions; Schedules L and M-1; adding depreciable asset data; and reviewing and delivering returns. Entity-specific topics, such as partner/shareholder data entry and specially allocating items to partners, will also be covered.

Level: Basic
Hands-On (150 minutes)
Instructor: Drew Leuhm, Thomson Reuters
Session: E5 & F5

ULTRATAX/1120 & 1065 ESSENTIALS 2

In this advanced workshop, we'll show you how to get the most out of the UltraTax/1120C, 1120S, and 1065 software. Topics include integrating Accounting CS general ledger info; entering multi-state apportionment, accruing federal and state income tax, and examining book vs. tax depreciation; calculating NOLs and disposing of assets through like-kind exchange; entering shareholder change of ownership, Section 1377 election, and shareholder basis; analyzing Schedule L, M-1, and M-2; and working with change of ownership and partner special allocations, using interim closing of books method, and working with partner basis. Prerequisites include a working knowledge of UltraTax/1120 & 1065 and/or successful completion of the UltraTax/1120 & 1065 Essentials 1.

Level: Advanced
Lecture (100 minutes)
Instructor: Paul Kelley, Thomson Reuters
Session: C6

ULTRATAX/1041 ESSENTIALS 1 *new*

This workshop will guide you through the fundamental basics of entering data for 1041 Fiduciary returns using UltraTax CS. Topics include data-entry of general and beneficiary info, entering income, deductions and allocation info; reviewing diagnostics and viewing amounts on forms; and examples for simple trusts, complex trusts, and Charitable Remainder Unitrusts (CRUTs).

Level: Basic
Lecture (50 minutes)
Instructor: Andrew McCracken, CPA.MAcc, Thomson Reuters
Session: F12

THOMSON REUTERS™

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 streamlined installation, seamless patching, multiple office setup, Affordable Care Act workflow, new 1120 corporate returns (1120-SF and 1120-IC-DISC), improvements to the transfer of assets functionality, and mass disposition of assets that elected Section 179 expenses. We'll also discuss other new features that you can expect to see, including the redesign of beneficiary input, new state products for the 990 & 706 tax returns, and improved handling of PDF documents for e-filing and digital storage of archived tax returns. Join us to truly understand how the new release will impact your firm, so you can get the most productivity out of your UltraTax CS software.
Level: Overview
Lecture (100 minutes)
Instructor: Therese Witherow, Thomson Reuters
Session: A10 or E10 or G10

TIPS FOR STREAMLINING YOUR ELECTRONIC FILING PROCESS

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 View tool that lets you view and cross-reference info 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: G9

ULTRATAX CS: MASTERING THE GREEN 'E' *new*

Are you using the Electronic Filing Status dialog to its potential? The multiple-line status grid contains comprehensive e-filing info, and we'll show you how to customize the green 'e' dialog to your firm's needs, especially around tax deadlines. And we'll show you how to manage the default view to set column titles as primary, secondary, or hidden to fit with your firm's tax workflow. You'll discover how to use not only the pre-defined filters or status options, but organize your status list by designing customized filters to display which returns appear in the Electronic Filing Status dialog in relation to not just the basic acceptance and rejection, but design based off Individual vs. Business deadline dates, refunds vs. balance due returns, and printed vs. emailed acknowledgement notices to clients. And you'll see how these status dialog customizations will help in creating your own reports for special situations.
Level: Intermediate
Lecture (50 minutes)
Instructor: Dan Johnson, Thomson Reuters
Session: D10

ULTRATAX CS ADVANCED CLIENT DOCUMENT FEATURES

Know how to customize your client documents? 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: E4 & F4

ULTRATAX CS PARTNER REVIEW & PLANNING TOOLS

UltraTax CS provides partners with powerful review tools—such as diagnostics, tickmarks, field and client notes, and the ability to view prior year data—for tracking return data, ensuring accuracy, and reviewing returns seamlessly. In this workshop, 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. And you'll see how these tools can help you add high-value tax planning services to your firm's service portfolio.
Level: Advanced
Hands-On (100 minutes)
Instructor: Trumaine Ferguson, Thomson Reuters
Session: G3

TRACK THE PROGRESS OF RETURNS
USING ULTRATAX CS CLIENT STATUS SYSTEM *new*

There's much more to UltraTax CS than just entering data to complete a client's tax return. In this workshop, you'll discover the built-in Client Status system tool, which maximizes your firm's workflow process and tracks efficiency seamlessly. Topics include adding and customizing client status events; viewing results of client status events in graph or grid format; filtering client lists by status to speed up daily tasks; and integrating client status events with Practice CS® and transferring UltraTax CS invoice amounts to Practice CS. If you haven't given yourself the time to investigate these timesaving features, this workshop is for you.
Level: Intermediate
Lecture (50 minutes)
Instructor: Trumaine Ferguson, Thomson Reuters
Session: F9

QUERY YOUR FIRM'S DATABASE
USING ULTRATAX CS DATA MINING *new*

Data Mining is a versatile feature in UltraTax CS that enables you to query your firm's databases for specific data and client characteristics. Built right into UltraTax CS, Data Mining easily identifies each client's tax accounting needs, pinpoints tax savings opportunities for each client, and prepares announcements, reminder letters, and other client-specific communications. This underutilized productivity tool can make a significant difference in moving your firm toward more proactive tax planning guidance for clients.
Level: Intermediate
Lecture (100 minutes)
Instructor: Therese Witherow, Thomson Reuters
Session: H11

THOMSON REUTERS™

ULTRATAX CS PAPERLESS TAX WORKFLOW OVERVIEW

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

Level: Overview
Lecture (100 minutes)
Instructor: John Harden, Thomson Reuters
Session: C9

ULTRATAX CS BEST PRACTICES *new*

In this workshop, we'll examine overlooked tools in UltraTax CS that can speed your productivity and eliminate the pain points. Our best practices have been pulled from tax and accounting firms with proven success using UltraTax CS. You'll see how to implement best practices for using UltraTax CS's Home page; setting up UltraTax CS; data entry within UltraTax CS; and reviewing and delivering tax returns within UltraTax CS. Come prepared for an open discussion. Prerequisites include a working knowledge of UltraTax CS Setup Essentials, UltraTax CS 1040 Essentials 1 & 2, UltraTax CS 1120/1065 Essentials 1 and 2.

Level: Intermediate
Lecture (100 minutes)
Instructor: Anna Skowronek, Thomson Reuters
Session: G15

FIXED ASSETS CS ESSENTIALS

Explore the fundamental and advanced features available in this asset management program. This workshop covers 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: Drew Leuhm, Thomson Reuters
Session: G5 & H5

ANALYZE TAX STRATEGIES & COMMUNICATE RESULTS WITH PLANNER CS® *new*

Comprehensive tax planning adds value for your clients. And with Planner CS, you can review countless tax strategies and communicate results easily, using a variety of presentation tools. During this workshop, you'll become familiar with the layout and navigation of Planner CS, see how to export existing 1040 clients from UltraTax CS to Planner CS, and see how easy tax planning becomes across multiple years and alternative scenarios using Planner CS Auto Copy and Auto Increase functions. You'll also see how report templates can help you analyze complex tax implications and construct a professional presentation that communicates various alternatives to your clients.

Level: Basic
Lecture (100 minutes)
Instructor: Emily Hool, Thomson Reuters
Session: A12

TOOLBOX CS: TAX & ACCOUNTING TOOLS FOR YEAR-ROUND SUCCESS *new*

With the handy tax and accounting tools in ToolBox CS, you get calculators, forms, and more. Designed for year-round use, it can be especially helpful during tax season. In this workshop, you'll see how to save valuable time and provide enhanced client service with tax calculators (such as the Traditional IRA to Roth IRA Conversion calculator). And you'll see how to provide clarity to your clients on advanced tax topics (such as why they can or can't claim certain credits or deductions) using the built-in IRS flowcharts from various IRS publications. You'll also see how to gain quick access to key IRS forms and create more effective templates for common internal office documents.

Level: Basic
Lecture (50 minutes)
Instructor: Chris Lillis, Thomson Reuters
Session: D9

SOURCE DOCUMENT PROCESSING SERVICE: IT'S MORE RELEVANT THAN YOU MIGHT THINK

In this workshop, we'll focus on the FileCabinet CS Source Document Processing solution built on OCR technology, and we'll take a look at why it benefits practitioners. You'll see what's being done to make this product more effective and efficient in 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, Founder and CEO, 7th Rule Accounting
Session: A9

GOSYSTEM® TAX RS

GOSYSTEM TAX RS 1065 & 1120 ADVANCED *new*

GoSystem Tax RS is widely regarded as one of the most powerful tax compliance solutions available. However, many firms remain unfamiliar with how and when to use some of its most powerful features. This workshop will not only highlight best practices concerning the preparation, e-file, and overall workflow of business tax returns, it will also showcase some of the often overlooked functionality—including imports/exports, OLE spreadsheet linking, batch printing, SubView, and data entry and navigational tips—which are key to enhancing efficiency and profits.

Level: Advanced
Lecture (100 minutes)
Instructor: Jeremy Strouse, Thomson Reuters
Session: H16

THOMSON REUTERS™

GOSYSTEM TAX RS NAVIGATION & 1040 ADVANCED *new*

Individual tax preparation today is quite different than it was even a decade ago. 1040 returns are no longer the profitable mainstay they once were and as a result, firms are looking for optimal speed and efficiency in processing. Join us for a look at some of the more successful 1040 workflows employed by firms using GoSystem Tax RS along with tools critical to a lean 1040 process, including imports/exports, review tools, status tracking, e-file workflow, navigational tips, and more.
Level: Advanced
Lecture (100 minutes)
Instructor: Denise Godbee, Thomson Reuters
Session: B16

WHAT'S NEW: GOSYSTEM TAX RS *new*

Exciting and time-saving changes are coming to GoSystem Tax RS for the 2013 tax year. Join us for an overview of the key added functionality and program changes your firm will want to use for maximum productivity in the 2014 processing season.
Level: Overview
Lecture (50 minutes)
Instructor: Denise Godbee, Thomson Reuters
Session: D16

GOSYSTEM TAX RS: MINING YOUR DATABASE USING FORMSOURCE *new*

FormSource represents one of the most powerful, yet most under-utilized, utilities available in GoSystem Tax RS. FormSource represents an opportunity to locate clients who meet specific criteria in a much more effective manner than reviewing returns one by one. And it can assist in locating returns which must be amended due to retroactive tax law changes, clients who might benefit from value added services (such as tax planning), or any number of other situations. In this workshop, you'll receive an overview of FormSource along with step-by-step guidance on building powerful queries.
Level: Intermediate
Lecture (50 minutes)
Instructor: Jerremy Strouse, Thomson Reuters
Session: F16

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 the 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 (50 minutes)
Instructor: Alison Hearn, Thomson Reuters
Session: D11 or F11

PRACTICE CS: GAINING BILLING & RELATED EFFICIENCIES *new*

Explore how to maximize the efficiency of billing your clients and reduce the number of days to collect payment. We'll explore how to incorporate the billing process into your everyday workflow using dashboards, reporting, and project management along with how your invoice and statement formats can assist in decreasing the amount of billing decisions required. We'll define, discuss, and setup value billing, recurring bills, invoice integration, and progress bills. And you'll see how to increase payment collection through client portals, online bill payment, and credit card processing.
Level: Intermediate
Hands-On (200 minutes)
Instructor: Angela Sillmon, Thomson Reuters
Session: A3 & B3

PRACTICE CS PROJECT MANAGEMENT & WORKFLOW

In this hands-on workshop, discover everything you need to effectively implement the Project Management module at your firm. 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: Gregg Sanford, Thomson Reuters
Session: A4 & B4 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: Gregg Sanford, Thomson Reuters
Session: E12

ADVANCED FEATURES IN PRACTICE CS

Take Practice CS to the next level in this workshop. We'll demonstrate how to streamline your data entry and workflow processes with user preference adjustments, client portals, file transfers, and Mobile CS®. We'll also explore enhanced data collection and reporting of client and staff info along with using filtering and reporting options to quickly find critical info.
Level: Advanced
Lecture (100 minutes)
Instructor: Will Hill, Thomson Reuters
Session: E8 or H7

PRACTICE CS CUSTOM FORMATTING: INVOICES & STATEMENTS *new*

Become familiar with custom formatting and create custom invoice formats, statement formats, labels, and letters. After this workshop, you'll be able to identify design concepts of custom formats, identify useful formatting tools, and create custom invoices, statements, labels, and letters from existing templates.
Level: Basic
Lecture (100 minutes)
Instructor: Manisha Patel, Thomson Reuters
Session: B12

THOMSON REUTERS™

PRACTICE CS CUSTOM FORMATTING: BEYOND BASICS (new)

This hands-on workshop 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: Invoices & Statements or a general understanding of Practice CS setup and custom formats.
Level: Intermediate
Hands-On (150 minutes)
Instructor: Christie Johnston, Thomson Reuters
Session: C4 & D4

PRACTICE CS REPORT & INVOICE FORMAT LABORATORY

This exciting workshop 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 on an invoice, statement, or report format of your choice, 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: Christie Johnston, Thomson Reuters
Session: H3

MAXIMIZING PRACTICE CS INTEGRATION WITH THE CS PROFESSIONAL SUITE

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, MyWork, UltraTax CS return history, and UltraTax CS client complexity.
Level: Intermediate
Lecture (100 minutes)
Instructor: Angela Sillmon, Thomson Reuters
Session: G14

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: Paul Kelley, Thomson Reuters
Session: H9

BEST PRACTICES FOR IMPLEMENTING CLIENT PORTALS

The 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, we'll cover how to sell portals to clients, managing a large number of portals, and general workflow. What's new in the latest release of NetClient CS will also be highlighted.
Level: Overview
Panel (100 minutes)
Moderator: M. Darren Root, CPA.CITP, Root & Associates, CPAs; RootWorks LLC
Session: B9 or E9

BRINGING YOUR ULTRATAX CS PRACTICE ONLINE WITH NETCLIENT CS

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 info 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: Chris Lillis, Thomson Reuters
Session: B6

SETTING UP YOUR FIRM FOR CLIENT PORTALS (new)

If you're just entering the client portal space, this workshop is for you. You'll hear about all the setup flexibility available in the CS Professional Suite as well as tips for which setup methods will be right for your firm for all phases (testing, roll-out, and maintenance). We'll also discuss marketing of portals to internal staff, training of internal staff, and identifying all the help that is available for specific CS Professional Suite applications to get started. To gain the most benefit, it's recommended that participants have a familiarity with the client portal options available. If you're unsure, attend a NetClient CS Portals: More Than Document Delivery product demo. We also recommend attending NetClient CS: The Client Experience workshop for more in-depth discussion on communicating portals to your clients.
Level: Basic
Lecture (100 minutes)
Instructor: Andrew McCracken, CPA.MAcc, Thomson Reuters
Session: A6

THOMSON REUTERS™

NETCLIENT CS: THE CLIENT EXPERIENCE

For successful implementation, it's helpful for your clients to understand the many benefits of using NetClient CS client portals and to know how to actually use them. We'll discuss how to select modules and services that your clients will find useful, ideas on training, and setup of NetClient CS that will make sense to your clients. You'll see how to use NetClient CS features to communicate with clients and establish a portal your clients will find simple and beneficial. 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
Lecture (50 minutes)
Instructor: Andrew McCracken, CPA, MAcc, Thomson Reuters
Session: D6

NETCLIENT CS: MARKETING TOOLS *new*

Your firm gets it. You've gotten everyone on board. How do you get the word out to your clients? Come get a look at all the marketing tools available to help you advertise "secure online accounts" to your client base, and see how to get them excited about it.

Level: Overview
Lecture (50 minutes)
Instructor: Angela Sillmon, Thomson Reuters
Session: F6

EXPLORING SAAS PROFILES: GETTING THE MOST OUT OF YOUR INVESTMENT *new*

Maybe you're interested in Software as a Service (SaaS). Or possibly you've made the decision to move, but you're not sure which profiles to use. Come join a discussion about the background of SaaS, what each profile provides, which staff would benefit the most from each profile, and what options are available to help you transition.

Level: Overview
Lecture (50 minutes)
Instructor: Matt Towers, Thomson Reuters
Session: F14

DOCUMENT MANAGEMENT

FILECABINET CS: ESSENTIALS FOR THE OFFICE STAFF *new*

Get the steps and info that your 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
Hands-On (150 minutes)
Instructor: Will Hill, Thomson Reuters
Session: C2 & D2

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 on making their paperless office more efficient. In a question-and-answer format, we'll explore common FileCabinet CS tips, processes, and user experiences. A working knowledge of FileCabinet CS is recommended.

Level: Advanced
Lecture (100 minutes)
Instructor: Calvin Leong, Thomson Reuters
Session: G13

FILECABINET CS TIPS FOR ARCHIVING & PERFORMANCE IMPROVEMENT

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 certain documents should be archived.

Level: Intermediate
Lecture (50 minutes)
Instructor: Calvin Leong, Thomson Reuters
Session: D13

GOFILEROOM: WHAT'S NEW *new*

Review the performance and user interface enhancements to GoFileRoom version 11 and preview GoFileRoom version 12, including its many new features, enhancements, and new user interface. We'll also show you how GoFileRoom version 12 will impact your firm, and how you can get the most productivity out of your GoFileRoom software.

Level: Overview
Lecture (100 minutes)
Instructor: Greg Yeargan, Thomson Reuters
Session: C13

GOFILEROOM PLATFORM GADGETS & CALENDAR *new*

In this workshop, find out how to optimize your Home page in GoFileRoom version 11 with Best Practices of the profession and get a preview of the gadgets for GoFileRoom version 12. You'll see how to add and format gadgets on different pages to take full advantage of your software. We'll also preview how the new Calendar module functions within GoFileRoom version 12 can better assist you in due date management.

Level: Basic
Lecture (100 minutes)
Instructor: Andrew McCracken, CPA, MAcc, Thomson Reuters
Session: E13

GOFILEROOM RULES BASED WORKFLOW *new*

There are three different types of Workflows within the new GoFileRoom: Serial; Parallel; and Rules Based which additionally offers customizable options. You'll see how Rules Based Workflows can meet all your firm's needs, while offering new levels of efficiency. We'll also show you how to create the templates and what other options are available. In this workshop, you're limited to only the ideas in your mind.

Level: Advanced
Lecture (50 minutes)
Instructor: Calvin Leong, Thomson Reuters
Session: F13

THOMSON REUTERS™

PROFESSIONAL TOPICS ★

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: C11

USING MOBILE DEVICES IN THE TAX & ACCOUNTING PROFESSION
Mobile devices are everywhere and they're fast becoming an important tool in today's tax and accounting firm. Join us to see how you can use mobile devices to improve efficiency and client service in your firm. We'll discuss many of the current mobile devices available, how they can be applied in your firm, and the specific apps that are useful to tax and accounting firms. Although we'll briefly touch on BYOD vs. firm-provided devices, we recommend also attending Setting Mobile Device Security/Policies for more in-depth security discussions.
Level: Overview
Lecture (100 minutes)
Instructor: Christina Kellerhals Wiseman, Thomson Reuters
Session: G12

SETTING MOBILE DEVICE SECURITY/POLICIES *new*
Mobile devices are everywhere. And your staff doesn't just want to use them in all aspects of their lives, they EXPECT TO. Join us for a discussion on allowing staff to use personal mobile devices with firm resources, as well as the security considerations you should have regarding mobile devices, both at a firm and personal level.
Level: Overview
Lecture (50 minutes)
Instructor: Christina Kellerhals Wiseman, Thomson Reuters
Session: F8

MOBILE STRATEGIES FOR SUCCESS *new*
Mobility is not the next big thing, it's today's thing! In this workshop, you'll discover options for successful mobile computing including smartphones, tablets, remote access, and other enabling technologies, along with which tools are right for specific tasks. You'll also see how mobile applications extend key products, help you to provide better client/customer service, and enable doing business in innovative ways. Join us to discover the best devices and apps to maximize your team's productivity when away from the office.
Level: Overview
Lecture (50 minutes)
Instructor: Randy Johnston, MCS, Executive Vice President, K2 Enterprises
Session: D12

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. See the latest business tablets, smartphones, and other gadgets that should be in your firm today, as well as some gizmos that will have you wondering how they even got off the drawing board. This workshop separates the hype from the really useful, while presenting the technology of today and tomorrow in a lively and entertaining format that will appeal to any audience.
Level: Overview
Lecture (100 minutes)
Instructor: Roman Kepczyk, CPA.CITP, Xcentric
Session: B8

UNDERSTANDING THE CPA FIRM'S DIGITAL ECOSYSTEM *new*
We'll incorporate the 2013 AAA Paperless Benchmarks, covering what firms are doing today to optimize their tax, audit, and administrative workflows. We'll also integrate a brief overview of the tools that firms should be using, both in the office and in the field, during this quick moving firm workflow workshop.
Level: Overview
Lecture (100 minutes)
Instructor: Roman Kepczyk, CPA.CITP, Xcentric
Session: A8

USING THE WEB TO ENGAGE PROSPECTS & DRIVE BUSINESS *new*
The web is a formidable tool to both prospect and close business in today's professional services environment. How does your firm develop the tools and the in-house capabilities to leverage all the power the web has to offer? This workshop seeks to provide some general building principles and real-life examples of how firms are using the web to win business. We'll cover social media, website strategy, content creation, and more.
Level: Overview
Lecture (100 minutes)
Instructor: Roy Keely, Xcentric
Session: C16

TODAY'S IT TRENDS & THEIR RELEVANCE IN YOUR FIRM *new*
Technology has never been more "in Vogue" than it is now, making it even harder to distinguish between the relevant and the completely useless. This workshop seeks to remove some of the clutter around today's IT trends and distinguish the trends that can have a positive impact on your firm in the near future. Some of the topics we'll cover include the latest devices, the cloud, SaaS, security, virtualization and more.
Level: Overview
Lecture (100 minutes)
Instructor: Roy Keely, Xcentric
Session: G8

THOMSON REUTERS™

GETTING YOUR BUSINESS STARTED WITH SOCIAL MEDIA *new*

For all the commotion over social media, there's surprisingly little concrete, reliable info 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 our social media and web marketing director, as he brings you the guidance you've been looking for. We'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: E15

TABLETS: IPAD, ANDROID OR WINDOWS RT? *new*

Tablet computers have changed the way we use computer technology, and the major operating systems (Apple iOS, Google Android, and Microsoft Windows RT) have different approaches to hardware, software, and security. This workshop will provide an overview of the features and functions included on the major tablet operating systems, and it will help you identify which operating systems may be the best fit for your business applications. We'll also discuss some of the risks and benefits associated with each platform, including the availability of hardware and software, tools for online collaboration and synchronization, and battery life.

Level: Overview
Lecture (100 minutes)
Instructor: Brian Tankersley, CPA.CITP, K2 Enterprises
Session: A15

THE NEW GRAPEVINE: SOCIAL MEDIA TOOLS & TIPS FOR ACCOUNTANTS

Social Networking has changed the way we all market our services, do business, and keep in touch with friends, family, and clients. This workshop will discuss the tactical topics related to social networking. Attendees will see how other accounting professionals are using social media. We'll also review methods for measuring, managing, and monitoring your social networking impact, including analytical tools, online services, and alerts.

Level: Overview
Lecture (100 minutes)
Instructor: Brian Tankersley, CPA.CITP, K2 Enterprises
Session: B15

PUT YOUR WEBSITE TO WORK FOR YOUR FIRM

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 website work for your firm by making it a hub for your clients and prospective clients with dynamic content.

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

TAX

INDIVIDUAL TAX UPDATE *new*

We'll cover individual tax changes in 2013, including the Taxpayer Relief Act of 2012, any new legislation, IRS regulations, rulings, and cases, together with significant 2013 form changes. Special attention will be paid to the tax aspects of the Affordable Care Act, including the new 0.9 and 3.8% Medicare taxes, and the impending Individual Mandate for health insurance coverage, which kicks in on January 1st.

Level: Overview
Lecture (100 minutes)
Instructor: Douglas J. VanDerAa, CPA, JD, Federal Tax Workshops, East Lansing, MI
Session: A11

BUSINESS TAX UPDATE *new*

This workshop offers the latest info on the business related provisions of the Taxpayer Relief Act of 2013, most of which expire at the end of 2013, together with recent IRS regulations, rulings, and cases dealing with corporations, partnerships, and S corporations. We'll also cover how the Affordable Care Act affects businesses, including the Shared Responsibility Payments (employer tax penalties), counting full time employees, and testing of affordability.

Level: Overview
Lecture (100 minutes)
Instructor: Douglas J. VanDerAa, CPA, JD, Federal Tax Workshops, East Lansing, MI
Session: B11

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: C7 or H15

PAYROLL COMPLIANCE: 2013 & 2014 LEGISLATION UPDATE *new*

Get tips on how to make year-end processes more effective, efficient, and compliant. We'll discuss changes in Social Security, new SSA initiatives, and tips for reconciling payroll accounts, I-9 regulations (new hire reporting, pay practices, escheat rules, 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 2014, SUTA limits for 2014, and 53/27 week.

Level: Overview
Lecture (100 minutes)
Instructor: Jim Paille, Thomson Reuters
Session: C12

THOMSON REUTERS™

PREPARING YOUR FIRM FOR THE MOST COMPLEX PAYROLL *(new)*

This advanced workshop covers the most complex and convoluted topics faced by payroll providers today. 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 (e.g., withholding and SUI doing business in multiple states); fringe benefit taxation and reporting requirements 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. Prerequisites include a general understanding of payroll tax compliance.

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

WAKE UP & SMELL THE PAYROLL *(new)*

Are you on the fence about offering payroll services? Hear from a leader in the payroll industry on why positioning your practice to offer payroll services is a smart strategic move. We'll focus on industry trends and 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. Coffee will be available.

Level: Overview
Lecture (100 minutes)
Instructor: R. Sean Manning, CPA, Manning & Company PC
Session: B13 or H13

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 the workflow tools on a single platform that integrate smoothly with UltraTax CS.

Level: Intermediate
Lecture (100 minutes)
Instructor: Jesse Sanger, Thomson Reuters
Session: E14

BUILDING A MARKETING STRATEGY AROUND A DEFINED BUSINESS MODEL TO GROW YOUR PRACTICE & INCREASE PRACTICE VALUE

In this workshop, we'll 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, Root & Associates, CPA's; RootWorks LLC
Session: C10 or G11

USING PRACTICE CS TO STRENGTHEN YOUR FIRM/CLIENT RELATIONSHIP *(new)*

Building and maintaining strong relationships with your client base is a fundamental goal, and there are many tools and processes that can assist you in providing the best possible service to your clients. Practice CS can be configured and used in a way that helps your firm keep on top of all client-related activities, ensuring that questions can be answered immediately by anyone in the firm. And it allows the firm to be proactive and responsive to clients, rather than being in a reactive mode. Join us for a practitioner-led workshop, where a Practice CS power user will demonstrate and discuss how his firm uses the system for client relationship management, client interaction logging, and project tracking, ensuring the firm priority of maintaining strong and prosperous client relationships. Content will be geared toward firms that have used Practice CS for at least one year.

Level: Overview
Lecture (100 minutes)
Instructor: Paul Miller, Business by Design
Session: C8 or H8

BUILDING A FIRM FOCUSED ON TRUSTED ADVISOR-CLIENT RELATIONSHIPS & A PROGRESSIVE BUSINESS MODEL *(new)*

Our featured speaker from this year's Partner Summits will share an overview of how his firm created a trusted advisor relationship with clients, developed multiple income streams, and established a unique value proposition. You'll hear how his firm helps other entrepreneurs and small businesses be more tax efficient and make smarter business decisions, while providing traditional accounting firm services. We'll also explore his firm's high-margin business coaching, tax planning, and asset protection services for small businesses that employ many of the same tax planning strategies of larger firms. As a group, we'll discuss how you can offer and build your own trusted advisor services, create a business model to support them, and help clients rely on you by understanding the value your firm provides. And you'll walk away with ideas for your own practice.

Level: Overview
Lecture (100 minutes)
Instructor: Paul Miller, Business by Design
Session: E16

BUILDING A NICHE - EVER WANT TO HAVE A NICHE MARKET?

Having targeted the niche market of dental arts clients, this presenter has plenty of experience to share about his goal to create a turnkey solution, which is efficient, profitable, and easy to implement. He's halfway there, and he'll provide an update on the progress he's made since last year's conference. During the workshop, you'll find out why a practitioner would want to build a niche; what factors to consider in picking a niche; where to begin; how long it takes; and whether or not the grass is really greener. We'll also discuss the side issues such as marketing, what to do about old clients, and what kind of budget to set.

Level: Overview
Lecture (100 minutes)
Instructor: Rob Carmines, MST, CFP, CPA, Carmines, Robbins Financial Services, LLC
Session: C15 or H12

THOMSON REUTERS™

SAAS: A USER'S JOURNEY *new*

Hear how a fellow practitioner reviewed Thomson Reuters technology in order to save his business during turbulent times. Implementing SaaS after a death in the family, he was able to double his revenue, yet cut his employee costs, IT costs, and other operating expenses. In this workshop, you'll hear about his evaluation of and transition to the cloud, how his small firm is no longer tethered to a desk, how relationships have changed with his clients, and why his clients call him a "rock star."
Level: Overview
Lecture (50 minutes)
Instructor: Randy Crews, CPA, PLLC
Session: D14

JUMP STARTING YOUR NEW STAFF

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 for getting the most out of your new hires quickly, while minimizing their frustrations. Caution: an internal culture shift may be heading your firm's way after this workshop.
Level: Basic
Lecture (50 minutes)
Instructor: Will Hill, Thomson Reuters
Session: F15

EMBRACING CHANGE MANAGEMENT: THE KEY TO A STRONG FIRM CULTURE

There are books, articles, white papers, and conversations about how important change is to a strong and healthy firm. In this workshop, we'll explore the top initiatives you can launch in your quest to embrace change management as one of your core competencies of firm culture. We'll explore the definition of change management; the steps involved in changing a culture in a firm that does not invite change easily; the excitement you can create as a firm leader when you open your arms to firm change; and the five actions you can take upon your return home.
Level: Overview
Lecture (100 minutes)
Instructor: Sandra Wiley, COO, Boomer Consulting, Inc.
Session: A16

COLLABORATION: THE GLUE THAT BONDS PEOPLE TO YOUR FIRM *new*

Leaders from all levels of your firm are beginning to understand the power behind collaboration, which means far more than simply team meetings. Collaboration is a shift in communication, work styles, client interaction, and leadership. In this workshop, you'll discover the power of collaboration within your firm; how the engagement of top talent is dependent on a collaboration shift; the communication actions that deepen group thinking; and a plan for collaboration in the year ahead.
Level: Overview
Lecture (100 minutes)
Instructor: Sandra Wiley, COO, Boomer Consulting, Inc.
Session: G16

OFFICE 2013: WHAT'S IN IT FOR ME? *new*

Ready or not, Office 2013 has arrived. And Microsoft has unveiled a number of new features sure to improve productivity across all of the familiar Office applications. In this workshop, you'll see the new features, how to put them to use, and how to handle the upgrade process, including the potential to transition to Office 365 to save money on licensing. You'll also explore the deep integrations between Office 2013 and Windows 8, setting the stage for even greater levels of productivity.
Level: Overview
Lecture (100 minutes)
Instructor: Randy Johnston, MCS, Executive Vice President, K2 Enterprises
Session: E11

USING ADVANCED FEATURES IN ULTRATAX CS, FILECABINET CS, & PRACTICE CS TO MAKE YOUR FIRM MORE PRODUCTIVE

In this workshop, we'll focus on letter compliance, consent tracking, document management using Source Document Processing, and Practice CS integration with these applications. We'll also look at how firm productivity can be enhanced at the administrative level by making firm administrative personnel billable and enhancing workflow and document management.
Level: Overview
Lecture (100 minutes)
Instructor: John Anderson, CPA.CITP, Founder and CEO, 7th Rule Accounting
Session: H6

BEEF UP YOUR WEB SITE - A LOOK AT THE AAM WEBSITE AWARD WINNERS

A company website is so much more than a Yellow Pages ad; yet many accounting firms are still using it as a static holding place for their address and building photo. In this workshop, you'll see what your peers are doing to turn their sites into dynamic extensions of their company via an in-depth examination of the website award winners from the 2012 and 2013 Accounting Marketing Association. We'll offer detailed steps on improvements to increase traffic and provide a worthwhile experience for visitors. Key takeaways include how your website can be used to improve your business; how to change your website philosophy from static to dynamic; and how to present a meaningful website experience for your clients.
Level: Overview
Lecture (50 minutes)
Instructor: Gail Perry, CPA, Publisher, Sift Media US
Session: D15

THOMSON REUTERS™

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

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 those who need your services and how to reach them: 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, Executive Vice President, New Clients Inc.

Session: F10

THOMSON REUTERS™