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## Financing In Today's Economy

*A co-sponsored event between RBC Bank and the Georgia Society of CPAs Taxation Section*

Join the Taxation Section on September 2, 2009 for a very informative panel discussion on financing in today's economy. Experts from RBC Bank will participate on the panel and give valuable insight on how to increase lending knowledge and better understand the direction of borrowing, with particular attention to the sub-\$50M market. Attendees will have the opportunity to network with fellow CPAs over a wide range of specialties and other niche markets, as well as individuals from the banking industry.

### Panelists:

Gary Dowell, regional vice president, Commercial Markets  
Target industries and financial solutions

Tom Wilby, vice president, Group Risk Management  
The numbers that really matter; risk triggers both good and bad

Brian McLean, regional director, Asset Resolution Group  
The time dilemma. How do you buy time with the bank?

Doug Miller, senior vice president, Commercial Real Estate  
Is there light at the end of the tunnel?

### Moderator:

Virginia V. Persons, financial advisor, Morgan Stanley Smith Barney  
GSCPA Taxation Section

### Registration Information:

Course No. 09902  
Date: September 2, 2009  
Time: 3:30 – 5:30 p.m.  
Location: RBC Bank  
75 Fifth Street, Atlanta, GA 30308  
CPE Hours: 1 hour general  
Registration Fee: \$10

[Click here](#) to register.

## Management and Leadership in a CPA Firm – Part 1

In this issue's commentary, Bill Reeb starts a new series covering management and leadership in a CPA firm. Specifically, Reeb reviews common perceptions of management and leadership, various management styles and more. [Read More...](#)

## Advice on Keeping and Reducing Benefits in Today's Economy

In today's economic climate, many employers are reexamining the benefits that they offer to their employees with an eye toward cost containment, cutbacks or even elimination of some benefits. However, employers are also reminded about the importance of retaining key talent. Using the results from two recent surveys, this article from The Institute of Management and Administration urges CPA firms to carefully assess what and how much to reduce and balance this against what employees really want and value in benefits. [Read More...](#)

### **How to Develop a Sales Culture in Your Firm**

Where does selling fit into your firm's culture? To develop a true sales culture in your firm and thrive in this uncertain economy, your leadership team must be committed to establishing a firm-wide sales culture. This article by ConvergenceCoaching, LLC provides five steps to get there. [Read More...](#)

### **Metadata Awareness and Cautions**

While virtually all CPA firms are dependent on Microsoft Office applications like word processing and spreadsheets for creating client documents, there are valid concerns that they may be inadvertently exposing confidential information through the metadata captured within them. Learn what metadata is, how it's added to documents and how your firm can add a metadata cleanup procedure to your normal quality control process for finalization of all Word and Excel documents. [Read More...](#)

### **Accounting Technology Trends in a Questionable Economy**

Due to the current economic situation, many CPA firms may change their traditional technology management approach to a more conservative one that's focused on an immediate return on investment. In this article, CPA and technology expert Roman Kepczyk discusses four accounting firm technology trends for 2009 that can help your practice weather the year ahead and get positioned for even greater success in the future. [Read More...](#)

### **Management of an Accounting Practice Section Leadership Team Call for Volunteers**

The Management of an Accounting Practice Section has a few openings available for dedicated volunteers to serve on its leadership team. Your skills, passion and perspectives are needed to build upon an already vibrant section leadership team.

Volunteers are at the heart of the Georgia Society of CPAs work. The time and knowledge volunteered by members like you helps the GSCPA fulfill its promise to provide exceptional experiences, a vibrant community and essential tools to all members.

To learn more about joining the Management of an Accounting Practice Section leadership team, please contact [Jeff Wells](#), GSCPA Sections Manager.

### **Upcoming Conferences**



### **2009 Southeastern Accounting Show**

August 26-27, 2009

**NEW LOCATION!**

Georgia International Convention Center  
College Park, Ga.

[Course No. 13085](#) - Wednesday & Thursday

[Course No. 13086](#) - Wednesday only

[Course No. 13087](#) - Thursday only

CPE Credit: 16 hours (including a possible 16 hours A&A)

The complete agenda with speakers and session descriptions is available on the [GSCPA web site](#).

### **2009 Financial Institutions Conference**

September 17, 2009

Course No. 13095

**EARLY REGISTRATION DEADLINE ENDS 8/27**

Cobb Galleria Centre, Atlanta

CPE Credit: 8.5 hours general (with a possible 4 hours A&A)

Topics include: On the Economic, Political and Business Climate; Liquidity – Planning, Management, and Contingency (A&A); Marketing and Branding in the Current Economy; Enterprise Risk Management and Technology (A&A); Accounting and Auditing Update (A&A) and Strategic Planning for Uncertain Times.

The full schedule and list of speakers can be found on the [GSCPA web site](#).



### **2009 Fraud and Forensic Accounting Conference**

September 18, 2009

Course No. 13020

**EARLY REGISTRATION DEADLINE ENDS 8/28**

Cobb Galleria Centre, Atlanta

CPE Credit: 8.5 hours general (including a possible 7 hours A&A)

Topics include: The New Hard Times: Business Crimes, Ponzi Schemes and Affinity Frauds; – Implementing Professional Standards in Forensic Accounting Engagements (A&A); Building and Expanding your FVS Practice; Raising the Bar: The 7 Habits of the Highly Effective Rainmaker; Fraud Investigation: A Composite Case Study (A&A); How to Predict Impending Financial Crisis Before the Numbers Reveal It (A&A) and Understanding eDiscovery in Corporate America (A&A).

The full schedule and list of speakers can be found on the [GSCPA web site](#).

### **2009 Practice Management Conference**

November 15-17, 2009 (Golf outing on Sunday)



[Ritz-Carlton Lodge at Reynolds Plantation](#)

Greensboro, GA

Room Rate: \$169 (1-800-241-3333)  
Cut Off Date: October 30, 2009  
CPE Credit: 16 hours

This two-and-a-half day educational retreat is geared toward public accounting partners, managers on the partner track and sole practitioners for accounting practices of all sizes. This event is intended for partners and managing partners of small to mid-sized firms and is very appropriate for sole practitioners as well. The conference offers a wide selection of timely and informative sessions led by top national speakers on a variety of topics ranging from succession planning to partner compensation to retaining top talent and more.

[Click here](#) for more information and to register.

## **Upcoming CPE**

### **[Advanced Skills for the Budget Manager: Smart and Profitable Planning](#)**

Course No. 08033  
Date: Thursday, August 20, 2009

### **[The Complete Guide to Employment Issues - Reducing the Employer's Risk](#)**

Course No. 08036  
Date: Thursday, August 20, 2009

### **[Accounting Services, Compilations and Reviews: Effective Risk Management](#)**

Course No. 09008  
Date: Thursday, September 10, 2009

### **[Small Business Accounting and Auditing Update](#)**

Course No. 09025  
Date: Monday, September 21, 2009