### The Georgia Society of CPAs

## Decision Makers Conference

April 20-21, 2017 Cobb Galleria Centre Atlanta, Georgia Event Code: 13005 | 🖸 LS13005



The Georgia Society of CPAs

## Decision Makers Conference

April 20-21, 2017 | Cobb Galleria Centre, Atlanta Event Code: 13005 (both days) 13006 (Thursday only); 13007 (Friday only) 16 hours of CPE credit with a possible 8 hours of A&A

Ongoing changes in government and the CPA profession require that you have the most up-to-the-minute knowledge on subjects such as health care reform, immigration, tax relief, infrastructural enhancements, cybersecurity, financial statements, revenue recognition, internal controls, risk management, and fraud.

> Spend two days immersed in discussions on these topics with national leaders so you can conquer critical challenges head-on.

**Who Should Attend:** CPAs in management and leadership positions, CFOs, CEOs, and other financial professionals.

## LIVE STREAM ATTENDANCE Event Code: LS13005 (both days); LS13006 (Thursday only); LS13007 (Friday only) 16 hours of CPE credit including 4 hours of A&A

Live stream allows you to attend the conference from your home, office or anywhere you can access the Internet. You view the sessions in real time as part of the audience and have interaction with other attendees via chat areas. Live streamed sessions are indicated with the following symbol:

For more information or to register, visit olc.gscpa.org or call 404-504-2985 or 800-330-8889, Opt. 3.

## FEATURED SPEAKERS



#### **RONALD J. BAKER, CPA**

VeraSage Institute, Petaluma, Calif. Ron Baker started his CPA career in 1984 with KPMG in San Francisco. Today, he is the founder of VeraSage Institute and a radio talk-show host on the VoiceAmerica.com show The Soul of Enterprise: Business in the Knowledge Economy.

He's the author of seven best-selling books, including: *The Firm of the Future*; *Pricing on Purpose*; *Measure What Matters to Customers*; *Mind Over Matter*; *Implementing Value Pricing*; and *The Soul of Enterprise*, and has been on Accounting Today's Top 100 Most Influential People in the Profession 13 times, including being voted number three most influential in the profession.



#### MICHAEL K. CHENG, CPA

Financial Accounting Standards Board, Norwalk, Conn.

Mike Cheng joined the staff of the Financial Accounting Standards Board (FASB) in 2012. Mike serves as the Private Company Council (PCC) coordinator where he is responsible for all PCC related matters. He also led the Board's private

company decision making framework project focused on determining whether and in what circumstances it is appropriate to adjust financial reporting requirements for private companies following Generally Accepted Accounting Principles (GAAP). Currently, Mike is leading a project to help the Board decide its future agenda.

Prior to joining the FASB, Mike held various management positions with PricewaterhouseCoopers (PwC). Most recently, he was an Audit Senior Manager, Private Company Services in the firm's Stamford, Connecticut office. From 2003-2011, he also held roles of increasing responsibility in PwC's Core Assurance divisions in Buffalo and Rochester, New York.

## THURSDAY, APRIL 20

#### 7 - 8 a.m.

#### Registration/Continental Breakfast

#### 8 - 8:05 a.m.

Welcome and Announcements

#### 8:05 - 9:20 a.m.

#### A – The Business of the Future

#### Ronald J. Baker, CPA, VeraSage Institute, Petaluma, Calif.

Just as Einstein and his Theory of Relativity displaced Newton, the Knowledge Economy Theory is trumping The Industrial Revolution Model. Relevance, value, and profits are no longer based upon physical capital alone, but is based upon the combination of intellectual capital—the essence of mind over matter. Discuss how intellectual capital will impact businesses this year.

#### 9:20 - 9:35 a.m. Break

#### 9:35 - 10:25 a.m.

#### 📀 B – The Trump Card

#### Stephen Colavito, Jr., Asset Preservation Advisors, Atlanta, Ga.

Dictionary.com describes "Trump Card" as a noun – informal – "something that gives one person or groups the advantage over another." In today's economy, a "Trump Card" could potentially have a whole new meaning. Explore the current consensus economic outlook along with questions that many are asking, including: What are the global political trends and what affect do they have on the economy? What are central bankers plans to combat a trend that could make rate planning difficult? With a Trump Administration in the White House, how are they going to work with both parties to try and encourage economic growth?

10:25 - 10:35 a.m. Break

#### 10:35 - 11:50 a.m.

#### C - Everyday Ethics: Doing Well and Doing Good

Ronald J. Baker, CPA, VeraSage Institute, Petaluma, Calif.

All businesses have a vested interest in virtue, as they are dependent on the moral and cultural institutions of a free society. The economic and ethical point of business is to serve others. Business is a morally serious enterprise. It requires moral conduct to thrive in the long run.

11:50 a.m. - 12:50 p.m. Lunch

#### 12:50 - 2:05 p.m.

#### D1 - Financing Options for Businesses

Patrick Rutledge, CTP, Federal Home Loan Bank, Atlanta, Ga.

Discuss lending and financing options available to small- and medium-size businesses, as well as what a business needs to do before and after obtaining a loan, the use of credit/rating agencies, and what changes may occur under the new administration.

#### D2 - FASB/PCC Update: What You Need to Know Now (Part I) (A&A)

Michael K. Cheng, CPA, FASB, Norwalk, Conn.

Join Supervising FASB Project Manager - Private Company Council Coordinator, Michael Cheng, to learn what is going on at FASB. Stay on top of the continuing changes in the CPA profession through evaluation and emphasize of recent changes and what to expect for 2017 and beyond.

2:05 - 2:20 p.m.

Break

#### 2:20 - 3:10 p.m.

#### E1 - Succession Planning: The Dos and Don'ts for a Mid-Sized Company

James M. Harris, III, CFP<sup>®</sup>, CIMA<sup>®</sup>, The Harris Financial Strategies Group, Wells Fargo Advisors, LLC, Albany, Ga.

Many myths and concepts surround succession planning for businesses. Some businesses delay or dismiss the process because it seems overwhelming. Discuss the significance of a successful succession plan and the steps to achieve the important knowledge transfer from one generation to the next.

#### E2 - FASB/PCC Update: What You Need to Know Now (Part II) (A&A)

Michael K. Cheng, CPA, FASB, Norwalk, Conn. Continue the discussion of recent changes with FASB/PCC from session D2.

#### 3:10 - 3:20 p.m.

Break

#### 3:20 - 4:35 p.m.

#### F1 - Best Business Practices in Corporate Cybersecurity

Mitzi Hill, Esq., Taylor English Duma LLP, Atlanta, Ga.

The headlines tell us that information security and cyber threats are a problem for businesses of every size. Explore the landscape of the most common issues facing small- and medium-sized businesses, as well as what companies can do to avoid, mitigate, and respond to incidents.

#### F2 - Analyzing Key Points in Financial Information (A&A)

Timothy R. Veal, CPA.CITP, CFP<sup>®</sup>, CIA, CISA, CRMA, CGMA, CRCM, Nichols, Cauley & Associates, LLC, Dublin, Ga.

What do others see when they look at your financial statements? What do you see? Are you providing the information needed to make informative/sound decisions? Participate in this in-depth analysis to understand what banks, bonding companies and other third party users are assessing regarding your financial health. We will also be discussing what other financial information and formats you should consider to truly evaluate current and future performance.

## FRIDAY, APRIL 21

#### 7 - 8 a.m.

**Registration/Continental Breakfast** 

8 - 8:05 a.m. Welcome and Announcements

#### 8:05 - 9:20 a.m.

#### 🖸 G - Survival Skills for CFOs

Anthony C. La Russo, BA, MBA, CMA, Consultant & Lecturer, Naples, Fla.

The role of financial professionals has and continues to change in organizations. The stereotype of collecting and reporting data has been replaced by a broader vision focusing on improving an organization's results today and preparing it for the future. Explore specific actions that can be implemented to expand your role by improving your organization. Topics discussed range from managing big data, to developing a financial leadership pipeline covering several essential, non-traditional skills.

9:20 - 9:35 a.m. Break

#### 9:35 - 10:25 a.m.

#### H - What's Old Is New Again: Trump's Dismantling of Obama's Legislative Agenda

Marty Martenson, Esq., Martenson, Hasbrouck & Simon, LLP, Atlanta, Ga. With the arrival of the Trump administration in Washington D.C., there is little doubt that change will be the order of the day. Subjects such as health care reform, immigration, tax relief, infrastructural enhancements and national security head the list of issues that will likely steal the headlines in the months to come. Discussion will expand upon these topics and provide a business-centric analysis as to how President Trump may dive into these controversial and complex issues.

10:25 - 10:35 a.m. Break

#### 10:35 - 11:50 a.m.

#### I – Mergers, Acquisitions and Alliances

Anthony C. La Russo, BA, MBA, CMA, Consultant & Lecturer, Naples, Fla. Mergers/acquisitions and partnering have long been strategic vehicles to grow or change an existing organization, recently reaching new records of global activity. However, Corporate America's track record of being able to unify an acquired firm, with the acquirer, and provide a single organization with increased growth potential has been somewhat shaky. Develop a roadmap, including specification actions, for financial professionals, focused on improving the results of an acquisition, sale, spin-off/strategic split and/or the formation of an alliance.

#### 11:50 a.m. - 12:50 p.m.

#### Lunch

#### **Outstanding Member in Industry Award Presentation**

#### 12:50 - 2:05 p.m.

#### S J1 - Tax Update: Up-to-the-Minute Changes to Reform and Legislation

Arthur Auerbach, CPA, CGMA, Atlanta, Ga.

With many changes occurring this year, you need to be on top of recent legislation that affects your company and business. Join us for an update of changes for 2017, including a discussion of the tax reform proposals; the Trump plan, the Brady (House plan) and the Senate plan; and effective dates of any proposed, or if we are fortunate, any signed legislation. Impact on the Georgia tax returns given conformity and the effective date will also be discussed.

#### J2 - Internal Controls and Risk Management (A&A)

*Greg Clark, CPA, CGMA, Business Controls and Compliance Group, Gainesville, Ga.* The consideration of internal control is key to risk assessment. Risk management is more than preparing for the worst. It's more about planning for your organization's success. Learn how to apply the tools of risk management from a positive perspective.

2:05 - 2:20 p.m. Break

#### 2:20 - 3:10 p.m.

#### SK1 - Health Care Update: How Recent Changes Affect Your Employees

Arthur Auerbach, CPA, CGMA, Atlanta, Ga.

Changes to health care this year will have a direct impact on your company. Get the most recent information on the Affordable Care Act, the use of health savings accounts, flexible spending programs, and their effect on Medicare and Medicaid. Also discuss the fringe benefit planning and tax aspects, including the proposed medical filing requirement set out by the Department of Labor.

#### K2 - Are You Audit Ready? (A&A)

*Greg Clark, CPA, CGMA, Business Controls and Compliance Group, Gainesville, Ga.* Be prepared for your next audit by learning what information to pull together to mitigate questions during your audit and how to avoid the need to pull reports and information at the last minute.

3:10 - 3:20 p.m. Break

#### 3:20 - 4:35 p.m.

#### L1 - The Clash of the Generations: Managing a Multi-Generational Workplace

Larry Sheftel, PHR, SHRM-CP, AAAPM, HAW/Aprio, Atlanta, Ga.

With up to five different generations currently in the workforce, we sit on the precipice of one of the largest workplace shifts in recent history. Understanding how to manage a multi-generational workplace is now a necessity for retaining top talent and maintaining a cohesive and productive company culture. Learn how to identify and leverage differences, as well as similarities, between generations so that an equilibrium can be established allowing for continued growth and success during a time of change.

#### L2 – Deceptive Accounting Techniques: Lessons Learned (A&A)

*Greg Clark, CPA, CGMA, Business Controls and Compliance Group, Gainesville, Ga.* Discuss the accounting stories behind numerous famous financial statement frauds such as McAfee, Parmalat, Tyco, and WorldCom. Review deceptive accounting practices and the warning signs of problems in areas such as revenue recognition, significant estimates, and choices among accounting methods.

#### SAVE THE DATE!

## BUSINESS & INDUSTRY CONFERENCE

November 9-10, 2017 Cobb Galleria Centre Atlanta, Georgia

Event Codes: 13045 | 🖸 LS13045



The Georgia Society of CPAs

## REGISTRATION

Name	MI	Last	Member #
Company/Firm Name			
Address			
City	State	Zip	
Phone	Fax	Email	

#### Registration Confirmation: D Mail OR D Email

Check here if registration includes a change of address: 🛛

#### PRICING INFORMATION

Course Number	Member Early Fee	Member Standard Member Late Fee	Nonmember Early Fee	Nonmember Standard Nonmember Late Fee
13005 - Both Days	\$365 by 3/30	\$425 from 3/31-4/17 \$465 after 4/17	\$465 by 3/30	\$525 from 4/1-4/17 \$565 after 4/17
13006 - Thursday Only	\$255 by 3/30	\$315 from 3/31-4/17 \$355 after 4/17	\$355 by 3/30	\$415 from 4/1-4/17 \$455 after 4/1
🛛 13007 - Friday Only	\$255 by 3/31	\$315 from 4/1-4/18 \$355 after 4/18	\$355 by 3/31	\$415 from 4/1-4/18 \$455 after 4/18

LS13005 - Both Days	\$365 by 3/30	\$425 from 3/31-4/17 \$465 after 4/17	\$465 by 3/30	\$525 from 4/1-4/15 \$565 after 4/15
🗅 🖸 LS13006 - Thursday	\$255 by 3/30	\$315 from 3/31-4/17 \$355 after 4/17	\$355 by 3/30	\$415 from 4/1-4/15 \$455 after 4/15
🗅 🖸 LS13007 - Friday	\$255 by 3/31	\$315 from 4/1-4/18 \$355 after 4/18	\$355 by 3/31	\$415 from 4/1-4/18 \$455 after 4/18

**Cancellation Policy:** Cancellations/Transfers made up to three weeks before the seminar or conference will not incur an administration fee. Cancellations/Transfers made during the Standard Fee time frame are subject to a \$50 administration fee. Cancellations/Transfers made within three business days are subject to a \$100 administration fee for members; \$150 for nonmembers. *Cancellations/No shows on the date of the event forfeit the entire registration fee. No refunds or transfers of course fee will be made after the date of the event.* 

#### **REGISTER TODAY!**

**CALL** GSCPA CPE Department at 404-504-2985 or 800-330-8889, Opt. 3 to place a credit card order

FAX a completed registration form with credit card information to GSCPA at 404-237-1291

**INTERNET** registration available at www.gscpa.org

MAIL your completed registration with credit card information or check made payable to The Georgia Society of CPAs to:

The Georgia Society of CPAs Six Concourse Parkway, Suite 800 Atlanta, GA 30328

Turn Form Over for Breakout Session Selections & Payment Information

#### **BREAKOUT SESSIONS**

#### THURSDAY, APRIL 20

#### 12:50 - 2:05 p.m.

D1 - Financing Options for Businesses

D2 - FASB/PCC Update: What You Need to Know Now (Part I) (A&A)

#### 2:20 - 3:10 p.m.

- E1 Succession Planning: The Do's and Don'ts for a Mid-Sized Company
- E2 FASB/PCC Update: What You Need to Know Now (Part II) (A&A)

#### 3:20 - 4:35 p.m.

- F1 Best Business Practices in Corporate Cyber Security
- □ F2 Analyzing Key Points in Financial Information (A&A)

#### FRIDAY, APRIL 21

#### 12:50 - 2:05 p.m.

- J1 Tax Update: Up-to-the-Minute Changes to Reform and Legislation
- J2 Internal Controls and Risk Management (A&A)

#### 2:20 - 3:10 p.m.

- K1 Health Care Update: How Recent Changes Affect Your Employees
- □ K2 Are You Audit Ready? (A&A)

#### 3:20 - 4:35 p.m.

- L1 The Clash of the Generations: Managing a Multi-Generational Workplace
- L2 Deceptive Accounting Techniques: Lessons Learned (A&A)

#### MATERIALS Choose how you wish to receive conference materials



Download eMaterials

No printed materials provided at the conference Will receive printed materials at the conference

#### Live Stream Attendees will receive eMaterials

#### PAYMENT INFORMATION

	In-Person Attendance OR 🛛 🖸 LiveStream Attendance
	Use Money on Account
	Check for \$ made payable to The Georgia Society of CPAs
	Amount to charge credit card \$ Personal Card OR □ Company Card
	Discover 🗖 MasterCard 🗖 AmEx 📮 Visa
Car	d Number Expiration Date
Nar	ne as it appears on card



## **Task Force**

#### CHAIR:

R. Dale Cooper, CPA, MTX, Georgia Transmission Corporation, Tucker, Ga.

#### MEMBERS:

Lisa G. Killinger-Farmer, CPA, L2 Finance and Accounting Solutions, LLC, Atlanta, Ga. Jan H. Rowell, CPA, Atlanta, Ga.

## Facility

**Cobb Galleria Centre** 2 Galleria Parkway, Atlanta, Ga. 30339

2 Galleria Parkway, Atlanta, Ga. 30339 770-989-5095 **Directions:** http://tinyurl.com/cobbgalleria

## Hotel

Renaissance Waverly Hotel 2450 Galleria Parkway, Atlanta, Ga. 30339 770-953-4500 Website: www.renaissancewaverly.com

\*GSCPA does not have a room block established at any hotel

## Photography

By attending this event, you are demonstrating your permission to allow your photo to be taken and published in GSCPA marketing, promotional and web materials.

## ITEMS TO NOTE

If you have a specific dietary or other need, please contact the CPE Department at least one week prior to the conference at 404-504-2985 or 800-330-8889, Opt. 3.



If you have special needs under the Americans with Disabilities Act, please attach a written description or call 404-504-2985 or 800-330-8889, Opt. 3.



Six Concourse Parkway Suite 800 Atlanta, GA 30328

# Decision Makers Conference

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