

Presented by the Management of an Accounting Practice Section of the Georgia Society of CPAs

# CPA Firm Practice Management Conference 2007

Sunday, November 11 - Monday, November 12

Brasstown Valley Resort, Young Harris, Ga.

10 CPE Hours

Presenting Keynote Speaker

## Allan Koltin, CPA

*Structuring Today's CPA Firm  
for the Next Generation*

Enjoy  
Leadership



The Georgia Society of

# CPAs

One Profession. One Voice.

# CPA Firm Practice Management Conference

Sunday, November 11

4 - 5:40 p.m.

Am I Having Fun Yet?

5:40 - 7 p.m.

Cocktail Reception (drinks/light appetizers)

Dinner on your own.



Do you have  
time to play  
a-round?

## Top 10 Things to Experience at Brasstown Valley Resort

1. Championship Golf
2. Brasstown Stables
3. Lake Cruises
4. Brasstown Bald
5. Breathtaking Waterfalls
6. Wildlife & Lush Forest
7. The Georgia Mountain Fair
8. Helen, Georgia
9. Crane Creek Vineyards
10. Whitewater Rafting



# 2007 Program Schedule

## Ann H. Smith, CPA

Presentation Title: "Am I Having Fun Yet?"

### Presentation Summary:

Owning your own business can be a rewarding experience or an exhausting one. Many entrepreneurs have difficulty managing a business. If you find that you jump from problem to problem and feel that you have to do all the work yourself, you don't have a business—the business has you! If the dream you had for your business is not the reality, you will benefit from this seminar.



Attend this session to learn

- The importance of end in mind thinking
- How to move from being a technician to a manager to a leader
- Why systems make your business more valuable
- How to create a business that runs without you

## Speaker Bio: Ann Smith

Not your typical CPA, Ann Smith's combined past experience as owner of an accounting firm and a college instructor provide her the understanding of the issues of running a business and the ability to reach an audience in an engaging and entertaining fashion. She specializes in working with small business owners, offering outsourced CFO services as well as customer service training, systems development, and other support that small businesses need. Recognized for her unique and innovative accounting firm, Ann received numerous awards. Locally, she was named Woman Business Owner of the Year in 2003. Statewide, she was named the SBA's Financial Services Advocate of the Year in 2003, Georgia Woman Entrepreneur of the Year in 2004, and in 2006, her firm was named the Governor's Small Business of Excellence for businesses with one to five employees.

In 2007 she sold her firm and began focusing exclusively on consulting and training for small business owners. Active in the Georgia Society of CPAs, Ann is serving her second stint as a Council member. She has served two different times as section leader of the Information Technology Section and is a long-time member of the Section leadership team. She chaired the Southeastern Accounting Show in 2002, the largest conference presented by the GSCPA. She has served as a member of the CPE task force, and she is a presenter for the Society for all-day CPE courses and as a conference speaker.

# CPA Firm Practice Management Conference

Monday, November 12

7:30 - 8 a.m.	Breakfast
8 - 8:50 a.m.	Status of the Accounting Profession – Challenges and Opportunities Facing Today's Profession
8:50 - 9 a.m.	Break
9 - 9:50 a.m.	How to Identify and Develop Leadership Skills within Today's CPA Firm
9:50 - 10 a.m.	Break
10 - 11:40 a.m.	How to Identify and Develop Leadership Skills within Today's CPA Firm Continued
11:40 a.m. - 12:40 p.m.	Lunch
12:40 - 2:20 p.m.	<p>"How to" of Succession Planning including:</p> <ol style="list-style-type: none"><li>1) Who will be the firm's future managing partner (leader)?</li><li>2) How do we get retirement-minded partners to truly transfer their book of business?</li><li>3) Deferred compensation/retirement benefits – are they fair and consistent with the current value of the firm? Do they motivate partners to do the right things in terms of transferring their book of business as they near retirement?</li><li>4) Future leaders – how do we develop future partners/leaders to take the firm over from retiring partners?</li><li>5) Upstream merger strategies – if we can't develop the next generation of leaders, upstream (merger) may be the only way to go.</li></ol>
2:20 - 2:30 p.m.	Break
2:30 - 4:10 p.m.	<p>Practice Management Potpourri – In this session we will highlight and discuss "hot topics" facing accounting firms. These topics include:</p> <ul style="list-style-type: none"><li>• Firm governance</li><li>• Partner compensation</li><li>• Mergers &amp; acquisitions</li><li>• How to recruit, retain and develop staff</li><li>• Other practice management topics</li></ul>



# 2007 Program Schedule

## Allan Koltin, CPA

Keynote Presentation Title:

“Structuring Today’s CPA Firm for the Next Generation”

Presentation Summary:

This conference will explore contemporary issues facing practitioners and firms, and will cover the various areas described in the schedule.



## Speaker Bio: Allan Koltin

This year’s conference will feature Allan D. Koltin, CPA, President & CEO of PDI Global. PDI is one of the largest consulting firms in the country and has over 2,000 local and regional CPA firms as clients.

A nationally recognized speaker and industry analyst, Allan has appeared on the CNN, WGN and FOX television networks and has been quoted in such media as *Forbes*, *Business Week*, *Newsday*, *Crain’s Business*, *BBC World Service*, *Bloomberg News*, *Reuters Newswires*, *USA Today*, *New York Times*, *Wall Street Journal*, *Washington Post*, *New York Post*, *Chicago Sun-Times*, *Chicago Tribune* and *Los Angeles Times*. He has also spoken nationally and internationally at hundreds of conferences on the topics of leadership, partner compensation, mergers and acquisitions, human resources, professional practices, auto dealerships, assurance services, federal taxes, business valuation, litigation support, women’s initiatives, and practice management.

Highly sought for his ability to engage and inspire audiences, Allan enjoys delivering keynote addresses at conferences throughout the professional services industry. His passion is facilitating retreats and providing strategic coaching for firm leadership and partners. His specialties include leadership, management, firm profitability, growth, human capital development, and mergers and acquisitions.

Allan is a founding member of The Advisory Board, a think tank to professional and financial services firms. He serves or has served on the board of directors of Outsource Partners International, BKD Financial Advisors, HRB Business Services, National Association of Certified Valuation Analysts and the AAM Advisory Council. He has been an active member of the CEO Club of America, National Speakers Association, AAM, Law Marketing Association, American Bar Association and Professional Speakers of Illinois.

## GSCPA Management of an Accounting Practice Section

This Section is for members interested in improving accounting management practice for sole practitioners and small to mid-sized practices. This Section provides numerous opportunities for networking, learning, and interaction, such as the popular MAP Roundtables sponsored in partnership with chapters throughout the state and additional programming throughout the year. The group is a resource to partners of local firms in Georgia in the areas of practice administration, compliance, and improving the efficiency and quality of local firm processes.

### Hotel Information

Brasstown Valley Resort  
6321 US Highway 76  
Young Harris, Georgia 30582  
Phone: 706-379-9900 or 800-201-3205 (toll free)  
Email: [info@brasstownvalley.com](mailto:info@brasstownvalley.com)

Room Rate: \$159

The room rate is also valid on Friday, November 9 and Saturday, November 10

Cut off date: October 11, 2007

[www.brasstownvalley.com](http://www.brasstownvalley.com)

### Items to Note



**Internet** registration available at <http://www.gscpa.org>



**Fax** a completed registration form with credit card information to 404-237-1291



**Call** the GSCPA Customer Service at 404-231-8676 or 800-330-8889, Opt. 3 to place a credit card order.



**Mail** your completed registration form with credit card information or a check made payable to the Georgia Society of CPAs to GSCPA, Atlanta Financial Center, North Tower, Suite 400, 3353 Peachtree Road, Atlanta, GA 30326-1414



If you have special needs under the Americans With Disabilities Act, please attach a written description or call 404-231-8676, Opt. 3, or 800-330-8889, Opt. 3.

**Special Request:** If you have a specific dietary or other need, please contact the CPE Department at least one week prior to the conference at 404-231-8676, Opt. 3 or 800-330-8889, Opt. 3.

**Cancellation Policy:** Cancellations/Transfers made up to 3 business days before a conference are subject to a \$20 administration fee; Cancellations/Transfers made within 3 business days are subject to a \$50 administration fee; No refunds or transfers of course fee will be made after the date of the course; No-shows forfeit entire registration fee.

# REGISTRATION

**Registration confirmation:**    Mail *OR*    Email

Check here if your registration includes a change of address.

## 1 Personal Information

Name \_\_\_\_\_ MI \_\_\_\_\_ Last \_\_\_\_\_ Member # \_\_\_\_\_

Company/Firm Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ Email \_\_\_\_\_

## 2 Pricing Information

### Member

Early Registration Fee by **October 19, 2007:**  
Applicable when registration is received by the GSCPA prior to the cut-off date.

<input type="checkbox"/>	#13080	\$359
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### Non-Member

Early Registration Fee by **October 19, 2007:**  
Applicable when registration is received by the GSCPA prior to the cut-off date.

<input type="checkbox"/>	#13080	\$409
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### Member

Standard Registration Fee after **October 19, 2007:**

<input type="checkbox"/>	#13080	\$399
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### Non-Member

Standard Registration Fee after **October 19, 2007:**

<input type="checkbox"/>	#13080	\$449
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Check here if you are a current section member. Current members of the Management of an Accounting Practice Section receive \$20 off the early registration fee if received before the early registration deadline.

Check here if you are a GSCPA member in good standing and would like to become a member of the Management of an Accounting Practice Section to receive the \$20 off the early registration fee (section membership is free.)

## 3 Payment Information - Full payment must accompany registration form

Use Money on Account   Amount: \$ \_\_\_\_\_

Check for \$ \_\_\_\_\_ made payable to GSCPA.

Amount to charge credit card \$ \_\_\_\_\_

Discover    MC    AMEX    VISA                       Personal Card   OR    Company Card

Card Number \_\_\_\_\_ Exp Date (required) \_\_\_\_\_

Name as it appears on card \_\_\_\_\_

Signature \_\_\_\_\_



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