Scaling New Heights 2017 Training Sessions
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<th>Activity</th>
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</thead>
<tbody>
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<td>8:15 – 9:45</td>
<td>No Conference Activities</td>
</tr>
<tr>
<td>10:15 – 10:30</td>
<td>First Time Attendees Orientation</td>
</tr>
<tr>
<td>10:45 – 11:00</td>
<td>Break</td>
</tr>
<tr>
<td>11:00 – 12:00</td>
<td>Lunch as Your Own</td>
</tr>
<tr>
<td>12:00 – 1:40</td>
<td>QuickBooks Online Certification Exam Prep (Part 2)</td>
</tr>
<tr>
<td>1:45 – 2:00</td>
<td>Break</td>
</tr>
<tr>
<td>2:00 – 3:40</td>
<td>QuickBooks Online Certification Exam Prep (Part 2)</td>
</tr>
<tr>
<td>3:45 – 4:00</td>
<td>Break</td>
</tr>
<tr>
<td>4:15 – 6:00</td>
<td>Main Stage</td>
</tr>
</tbody>
</table>

**No Conference Activities**

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*Note: The schedule includes details of various workshops and sessions related to QuickBooks Desktop Advanced ProAdvisor Certification Exam Prep (Part 5). The details are not fully legible in the image.*
# Monday, June 5, 2017 Schedule

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Location</th>
<th>Speakers/Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00</td>
<td>Breakfast</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>7:30</td>
<td>Monday's Opening Keynote: Setting the Stage for the Day</td>
<td>Main Stage</td>
<td>Speaker A</td>
</tr>
<tr>
<td>8:00-</td>
<td>Apps X7: From Wave to Integrate</td>
<td>Main Stage</td>
<td>Speaker B</td>
</tr>
<tr>
<td>8:30-</td>
<td>Strategies for the Multichannel Professional</td>
<td>Main Stage</td>
<td>Speaker C</td>
</tr>
<tr>
<td>9:00-</td>
<td>Monitoring, Troubleshooting, and Testing</td>
<td>Main Stage</td>
<td>Speaker D</td>
</tr>
<tr>
<td>9:30-</td>
<td>The Key Advisor (Part 1): Time Management and Organizational Skills</td>
<td>Main Stage</td>
<td>Speaker E</td>
</tr>
<tr>
<td>10:00-</td>
<td>The Key Advisor (Part 2): Time Management and Organizational Skills</td>
<td>Main Stage</td>
<td>Speaker F</td>
</tr>
<tr>
<td>10:30-</td>
<td>The Key Advisor (Part 3): Time Management and Organizational Skills</td>
<td>Main Stage</td>
<td>Speaker G</td>
</tr>
<tr>
<td>11:00-</td>
<td>The Key Advisor (Part 4): Time Management and Organizational Skills</td>
<td>Main Stage</td>
<td>Speaker H</td>
</tr>
<tr>
<td>11:30-</td>
<td>Open Forum A: Break</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>11:30-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>12:00-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>12:30-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
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<tr>
<td>13:00-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
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<tr>
<td>13:30-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>14:00-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>14:30-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>15:00-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
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<tr>
<td>15:30-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
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<tr>
<td>16:00-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>16:30-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>17:00-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>17:30-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>18:00-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>18:30-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>19:00-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>19:30-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>20:00-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>20:30-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
<tr>
<td>21:00-</td>
<td>Lunch and Open Forum B</td>
<td>Main Stage</td>
<td></td>
</tr>
</tbody>
</table>
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<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:45 am</td>
<td>Registration Open</td>
</tr>
<tr>
<td>10:00 am</td>
<td>Keynote Speaker</td>
</tr>
<tr>
<td>10:15 am</td>
<td>Break</td>
</tr>
<tr>
<td>10:30 am</td>
<td>Session A1: Introduction to Advanced Product Management</td>
</tr>
<tr>
<td>11:00 am</td>
<td>Session A2: Understanding the Right Case Study</td>
</tr>
<tr>
<td>11:30 am</td>
<td>Session A3: The Leader's Role of the Product Manager</td>
</tr>
<tr>
<td>12:00 pm</td>
<td>Lunch</td>
</tr>
<tr>
<td>12:30 pm</td>
<td>Session B1: The Value of Product Management</td>
</tr>
<tr>
<td>1:00 pm</td>
<td>Session B2: The Leader's Role of the Product Marketing</td>
</tr>
<tr>
<td>1:30 pm</td>
<td>Session B3: The Leader's Role of the Product Support</td>
</tr>
<tr>
<td>2:00 pm</td>
<td>Break</td>
</tr>
<tr>
<td>2:15 pm</td>
<td>Session C1: The Leader's Role of the Product Development</td>
</tr>
<tr>
<td>2:45 pm</td>
<td>Session C2: The Value of Product Development</td>
</tr>
<tr>
<td>3:15 pm</td>
<td>Session C3: The Leader's Role of the Product Implementation</td>
</tr>
<tr>
<td>3:45 pm</td>
<td>Break</td>
</tr>
<tr>
<td>4:00 pm</td>
<td>Session D1: The Leader's Role of the Product Integration</td>
</tr>
<tr>
<td>4:30 pm</td>
<td>Session D2: The Value of Product Integration</td>
</tr>
<tr>
<td>5:00 pm</td>
<td>Session D3: The Leader's Role of the Product Operation</td>
</tr>
<tr>
<td>5:15 pm</td>
<td>Break</td>
</tr>
<tr>
<td>5:30 pm</td>
<td>Session E1: The Leader's Role of the Product Communication</td>
</tr>
<tr>
<td>6:00 pm</td>
<td>Session E2: The Value of Product Communication</td>
</tr>
<tr>
<td>6:30 pm</td>
<td>Session E3: The Leader's Role of the Product Documentation</td>
</tr>
<tr>
<td>7:00 pm</td>
<td>Dinner</td>
</tr>
<tr>
<td>7:30 pm</td>
<td>Welcome Reception</td>
</tr>
</tbody>
</table>

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**Attendance Requirements:**
- All attendees must register in advance.
- Each session will be recorded and available for access for one week after the event.
- Attendees must check in at the registration desk upon arrival.

---

**Contact Information:**
- For inquiries, please contact info@conference.com.
- Web: www.conference.com
- Phone: 123-456-7890

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**Sponsorship Opportunities:**
- Gold Sponsor: $5,000
- Silver Sponsor: $3,000
- Bronze Sponsor: $1,500

---

**Venue:**
- Convention Center
- Address: 123 Main Street, City, State, Zip
- Phone: 123-456-7890

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**CANCELLATION POLICY:**
- Full refund if cancelled 30 days prior to event.
- No refund after 30 days.
### Wednesday, June 7, 2017 Schedule

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 to 7:15</td>
<td>Breakfast</td>
</tr>
<tr>
<td>7:15 to 7:30</td>
<td>Transition</td>
</tr>
<tr>
<td>7:30 to 8:00</td>
<td>Main Stage (Breakfast)</td>
</tr>
<tr>
<td>8:00 to 8:15</td>
<td>Transition</td>
</tr>
<tr>
<td>8:15 to 10:00</td>
<td>Lunch and Open Exhibition</td>
</tr>
<tr>
<td>10:00 to 10:30</td>
<td>Open Exhibition &amp; Break</td>
</tr>
<tr>
<td>10:30 to 12:00</td>
<td>Lunch and Open Exhibition</td>
</tr>
<tr>
<td>12:00 to 1:00</td>
<td>Open Exhibition</td>
</tr>
<tr>
<td>1:00 to 1:30</td>
<td>Open Exhibition</td>
</tr>
<tr>
<td>1:30 to 1:45</td>
<td>Open Exhibition</td>
</tr>
<tr>
<td>1:45 to 2:30</td>
<td>Open Exhibition</td>
</tr>
<tr>
<td>2:30 to 2:45</td>
<td>Open Exhibition</td>
</tr>
<tr>
<td>2:45 to 3:30</td>
<td>Open Exhibition</td>
</tr>
<tr>
<td>3:30 to 3:45</td>
<td>Open Exhibition</td>
</tr>
<tr>
<td>3:45 to 4:30</td>
<td>Open Exhibition</td>
</tr>
<tr>
<td>4:30 to 4:45</td>
<td>Open Exhibition</td>
</tr>
<tr>
<td>4:45 to 5:30</td>
<td>Open Exhibition</td>
</tr>
<tr>
<td>5:30 to 5:45</td>
<td>Open Exhibition</td>
</tr>
<tr>
<td>5:45 to 6:00</td>
<td>Conference Ends</td>
</tr>
</tbody>
</table>
QuickBooks Online Certification Exam Prep (Summary of all 3 Parts)
The 3-part 2017 QuickBooks Online Certification Course consists of 12 Modules and prepares you to take the U.S. QuickBooks Online Certification exam. This course uses the official Intuit course curriculum. If you are pursuing the 2017 QuickBooks Online Certification Path, you should attend this course. Only members of the U.S. ProAdvisor Program will earn a badge for U.S. QuickBooks Online Certification on the find-a-ProAdvisor website.

Module 1: Getting Started
This module begins with an introduction to the advantages of using QuickBooks Online, and to the features available among its various subscription levels. The presenter highlights four unique client types and the QuickBooks Online subscription that is right for them. Lastly, this module presents key components of the QuickBooks Online interface with an overview of lists, transactions and tools.
Learning Objectives:
- Identify the benefits of using QuickBooks Online
- Determine which subscription level of QuickBooks Online to recommend
- Identify the main components of QuickBooks Online

Module 2: Setting Up
This module begins with a demonstration of the steps to create a QuickBooks Online company. Next, the presenter overviews settings for accounting, sales and expense-related settings. Then, the presentation segues to steps to set up Lists and Users—this includes set up of new customers, vendors and sales tax. The module closes with steps to import data into QuickBooks Online.
Learning Objectives:
- Specify the steps to create a new QBO Company
- Recognize the steps to manage Account and Settings
- Identify accounting related preferences
- Identify sales related preferences
- Identify expense related preferences
- Specify the steps to set up and modify Lists & Users
- Identify the steps to import data into QuickBooks Online

Module 3: Navigating & Customizing
This module begins with an in-product demonstration of the key navigational components of QuickBooks Online. These demos include the left navigation pane, QuickBooks Labs, Quick Create and the Gear icon. Next, the presenter provides steps to get desktop Apps for Mac and Windows. These specific Apps work with QBO and QBOA—without the use of browsers.
Learning Objectives:
- Recognize key components of the QuickBooks Online interface
- Specify the features and benefits of using the QuickBooks Online Apps for Mac & Windows
- Recognize navigation points in the QuickBooks Online Apps for Mac & Windows
Module 4: Common Workflows - Sales
This module presents the various access points from which to launch “money in” transactions related to sales and revenue. Topics include best practices for navigating the QuickBooks Online interface, tips for setting up accounting-related preferences, features of Online Invoices, functionality of QuickBooks Payments, and transactions that can be initiated using the Quick Create menu.

Learning Objectives:
• Recognize alternative entry points for entering sales transactions
• Define common QuickBooks concepts and terms related to recording transactions
• Identify best practices when using QuickBooks Online to record revenue
• Recognize the features of Online Invoices
• Identify the functionality of QuickBooks Payments
• Recognize methods for working with existing sales transactions
• Identify functionality of batch processes for sales transactions

Module 5: Common Workflows - Purchases
This module presents the various access points from which to launch “money out” transactions related to purchases. Topics include best practices for navigating the QuickBooks Online interface, tips for setting up accounting-related preferences, best practices when recording expenditures, and transactions that can be initiated using the Quick Create menu.

Learning Objectives:
• Recognize alternative entry points for entering purchase transactions
• Define common QuickBooks concepts and terms related to recording purchase transactions
• Identify best practices when using QuickBooks Online to record expenditures
• Recognize methods for working with existing purchase transactions
• Identify functionality of batch processes for purchase transactions

Module 6: Payroll & Other Transactions
This module begins with an overview of how to record financial activity for transactions not related to customers and vendors, including concepts and terms and transactions initiated using the Quick Create menu. Next, the presenter covers payroll, including offerings that integrate with QuickBooks Online, how to set up payroll, and payroll reports.

Learning Objectives:
• Recognize alternative entry points for entering other transactions
• Define common QuickBooks concepts and terms related to recording other transactions
• Identify the payroll offerings that integrate with QuickBooks Online
• Identify the steps to set up QuickBooks Online Payroll
• Identify common payroll reports in QuickBooks Online
• Identify additional transactions initiated using the Quick Create menu

Module 7: Banking & Tools
This module begins with an overview of the steps to set up and utilize bank feeds in QuickBooks Online. The presenter offers tips for connecting to a bank, importing bank transactions and setting up bank rules. Then, the presentation segues to the topic of QBO Tools used for recurring transactions, registers, attaching documents to transactions and reconciling.

Learning Objectives:
• Identify the steps to set up and utilize Bank Feeds
• Recognize the functionality of Recurring Transactions
• Determine the steps to reconcile transactions to a bank statement using the Reconcile Tool

Module 8: Reporting
This module begins with an overview of the reporting differences among the different subscriptions of QuickBooks Online. Next, the presenter overviews the key components of the Report Center – including navigation and Report Categories. Then, the presentation segues into steps to print, email and export reports to Excel or PDF. Lastly, the presenter offers detailed steps and tips for working with Report Groups, and with Management Reports.

Learning Objectives:
• Recognize the differences in reporting capabilities by subscription level
• Recognize the components of the Report Center
• Identify the process of printing, emailing and exporting reports
• Indicate the functionality of Grouped Reports

Module 9: Apps & the QuickBooks Online Ecosystem
This module begins with an introduction to Apps – what they are and how they benefit the QBO Ecosystem. The presenter overviews Accounts Payable automation and gives a tour of Apps.com. Next, the presentation segues into best practices for selecting Apps, how to add, test, and use Apps to benefit your clients.

Learning Objectives:
• Recognize the benefits of Intuit-approved apps
• Identify the steps to find, purchase and access apps that work with QuickBooks Online

Module 10: QuickBooks Online Accountant
This module begins with an overview of how to sign up and access QuickBooks Online Accountant. The presenter demonstrates features and functionality of the Client list and steps to manage permissions for team users accessing a QuickBooks Online Accountant firm. Then, the module transitions to an overview of features available to help manage your ProAdvisor membership. In-product demonstrations are included to highlight the functionality of the Your Books section in QuickBooks Online Accountant, as well as the unique features of the Accountant Toolbar.

Learning Objectives:
• Describe the steps to access and login to QuickBooks Online Accountant
• Identify features and functionality of the Client list
• Specify the steps to manage permissions for team users accessing your QuickBooks Online Accountant firm
• Recognize the features available to help you manage your ProAdvisor membership
• Identify functionality of Your Books section in QuickBooks Online Accountant
• Specify unique features of the Accountant Toolbar

Module 11: Accountant Tools
This module begins with an introduction to the Accountant Toolbox and highlights the Reports Tool and its impact on other QBO tools and reports. The presenter then provides in-product demonstrations of tools such as: Trial Balance, Reclassify Transactions, Voided/Deleted Transactions Report, Write off Invoices, Journal Entries, Close Books, Undo Reconciliation, New Window and, ProConnect Tax Online.

Learning Objectives:
• Recognize the Trial Balance functionality and its connection between QuickBooks Online (QBO) and ProConnect Tax Online (PTO)
• Recognize the tools available in the Accountant ToolBox
• Identify the Accountant Tools to troubleshoot errors
• Identify the process to avoid impacting prior accounting periods

Module 12: Troubleshooting
This module begins with an introduction to common banking center issues and QBO features used to troubleshoot. The presenter covers issues such as transactions already reconciled, transactions already matched, duplicate transactions etc. Then, the presentation segues into a deep dive into common mistakes made in QuickBooks Online and how to fix them. These issues include: Merging and deleting from Chart of Accounts, Voiding checks from a prior period, and A/R and A/P workflows. Lastly, the presenter reviews how to troubleshoot common issues with the Opening Balance Equity account. Learning Objectives:
• Recognize features to troubleshoot common Banking Center issues
• Specify the steps to modify lists
• Identify common mistakes made in QuickBooks Online and how to fix them

QuickBooks Online Certification Exam Prep (Part 1 of 3 Parts)
This session is the first part of the QuickBooks Online Certification Exam Prep course and covers Modules 1, 2, 3 and 4. (See detailed descriptions of modules under QuickBooks Online Certification Exam Prep (Summary of all 3 Parts))

This session uses the official Intuit course curriculum. If you are pursuing the 2017 QuickBooks Online Certification Path, you should attend this course.

Note: This session prepares you to take the U.S. QuickBooks Online Certification exam. Only members of the U.S. ProAdvisor Program will earn a badge for U.S. QuickBooks Online Certification on the Find-a-ProAdvisor website.

Instructor: Jason Meredith
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Intermediate
Prerequisites: A basic understanding of general accounting principles and QuickBooks Online functionality is required.

CPE Hours: 2
EA Hours: 0

When to Step Out Beyond QuickBooks for Inventory Management
As small businesses grow, so does their need for processing orders faster and managing inventory more accurately. This course identifies some common inventory limitations of QuickBooks, and how your clients may be able to solve them with 3rd Party QuickBooks Add-ons. We will explore types of businesses that manage inventory, typical inventory needs, and more complex inventory needs. Learning Objectives:
• Discuss when QuickBooks is the right choice for your clients’ inventory needs (specific examples will be cited)
• Discuss when complex inventory needs exceed QuickBooks capabilities, how an add-on solution can help.
Bold Advisor Pre-Conference Workshop: Firm Purpose, Mission, Values, and Big Y
To grow your firm requires that you know who you are, what you are good or bad at, and, most importantly, what your purpose is. In this workshop, you’ll not only learn how to determine your firm’s purpose, mission, values and key objectives, but also work in groups to derive them. By building and articulating the core foundations of your firm, you and your firm will be more focused, more purposeful and more effective in accomplishing your goals for 2017 and beyond.

Learning Objectives:
In this hands-on workshop, you will determine your firm’s:
- SWOT: What are your firm’s strengths and weaknesses?
- Purpose: What is your Why?
- Vision: Where do you want your firm to be in the future?
- Mission: What does your company do and for whom?
- Values: For the firm, staff, and you, what does your culture value?
- Big Y: What are the 3 enduring objectives for your firm?

QuickBooks Online Certification Exam Prep (Part 2 of 3 Parts)
This session is the second part of the QuickBooks Online Certification Exam Prep course and covers Modules 5, 6, 7 and 8. (See detailed descriptions of modules under QuickBooks Online Certification Exam Prep (Summary of all 3 Parts))

This session uses the official Intuit course curriculum. If you are pursuing the 2017 QuickBooks Online Certification Path, you should attend this course.

Note: This session prepares you to take the U.S. QuickBooks Online Certification exam. Only members of the U.S. ProAdvisor Program will earn a badge for U.S. QuickBooks Online Certification on the Find-a-ProAdvisor website.
Inventory Management Beyond QuickBooks: What’s Next?
You may have determined that QuickBooks Inventory capabilities will not meet your clients’ needs. You provide valuable support to your client through QuickBooks, so it’s natural to want to find a QuickBooks integrated solution that can meet your clients’ inventory needs as well. This course discusses what the next step should be once you have determined that your client needs to go beyond QuickBooks for Inventory Management. As you consider QuickBooks Add-Ons, the resources offered by an Add-On can greatly affect your ability to offer more value and better solutions to your client.

Learning Objectives:

- Discuss what should you consider when recommending a QuickBooks Add-On
- Discuss how will this recommendation affect you and your practice.

Instructor: Mario Nowogrodzki and Keith Fileccia
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Bill.com 101: Getting Up to Speed with the Accountant Console
Just starting out with Bill.com? This is the course for you! Robert Colburn, Account Manager at Bill.com, leads a hands-on demo of the Bill.com Accountant Console. Explore your new dashboard, see what an automated AP/AR workflow looks like, learn how to add new clients, and discover how to boost ROI with strategic pricing. For a high-value experience, pair this session with Judie McCarthy’s “Become a Bill.com Power User: Level-up Your Firm and Unlock Powerful Features.”

Learning Objectives:
You’ll learn:

- Everything you need to start using Bill.com today.
- Time-saving tips that will help you boost efficiency and delight clients.
- How to bring over existing clients to the platform—and how to sell it to new ones.

Instructor: Robert Colburn
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0
Financial Analysis: Expanding Your Value-Add Services

ACE-Approved: This course qualifies for 2 credits for Intuit’s Advanced Continuing Education (ACE) program.

Your clients trust you – they want more help but they do not know how to ask or they do not even know you can offer business analysis support. This session walks you through what specific analysis you can offer, how to introduce your financial analysis to your clients and expand your value-added services.

Learning Objectives
- Define & explore Financial Analysis
- Identify which analysis is best for your ideal client
- Identify how to develop industry specific ratios
- Discuss how to introduce financial analysis to your clients
- Explore how to structure your new services

Instructor: Gale Kirsopp
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Intermediate
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Building a Profitable Firm You Love

We've all been there. It's no fun to be in the position of working insane hours just to barely scrape by. We take tons of classes on how to market our services, asking advice of our heroes, but each person we ask gives us three different answers that completely contradict each other. Which way is the right way?!? ...Your way is. How do you find your way? Usually through trial and error, but we're going to give you a few tools to help you find your way more quickly.

Come and learn about 4 VERY different accounting firms, their practices, their stories, and the numbers behind them. We're going to get into the dirty details of what's worked and what hasn't. See what resonates with you, so you can forge your path and create a successful business that you love every day.

Learning Objectives
- Discover what size and style team is the right fit for you
- Learn how to pinpoint your ideal client relationships
- Find out what services your colleagues offer and at what prices
- Witness the successes, pain-points, and big decisions your colleagues are facing

Moderator: Ingrid Edstrom
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Operational Consulting Part 1: From the Beginning: Discover, Design, Pilot and Implement

Part 1 of Operational Consulting will walk you through how to take a new client through an operational process to build efficiencies within the client’s organization. Building the story of your client’s daily
processes enables you to design and implement process improvements. You will come away from this session with the tools needed to assess your client’s needs and make recommendations for process improvements and systems recommendations.

Instructors: Deborah Defer and Denise Bailey
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Creating a Comprehensive Marketing Plan
With so many different moving pieces, developing an effective marketing plan can seem overwhelming. It’s difficult to know where to start. In this session, we will explore the individual components of marketing in today’s world and how to bring those parts together into a comprehensive, and cohesive marketing plan for your firm.

Learning Objectives:
In this session, we will cover the following:
• Clarify services, packages and pricing
• Identify target market
• Cultivate referral relationships
• Local marketing
• Social media

Instructor: Michelle Long
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Practically Using Transaction Pro Utilities
This Peer-Led session provides in-depth training on the Transaction Pro line of products for QuickBooks and QuickBooks Online – empowering you to import, export and delete transactions and lists from QuickBooks and QuickBooks Online and to leverage import utilities to provide new consulting services to your clients.

Learning Objectives
The course will cover the following topics:
• Ecosystem Overview: the available technologies for exchanging data with QuickBooks and QuickBooks Online (QBO)
• Practical uses (and consulting opportunities) for Transaction Pro utilities
• Strategies for recommending, using and training clients on import/export utilities
• How to use Transaction Pro Importer
• How to use Transaction Pro Exporter
• How to use Transaction Pro Deleter
• How to use the tools for QuickBooks Online

Instructor: Fran Reed
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic, Intermediate and Advanced concepts
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Firm of the Future (El Negocio del Futuro)

This session will be presented in Spanish. (En Espanol)

Based on the world changes in technology, the new trend is to go online and to use the tools that all our companies need to be able to be efficient and successful. We need to be able to provide a New Client Experience, an innovating Value Packaging for our services and learn how to influence our Customers as trusted advisors. (Debido a los cambios en la tecnología a nivel mundial, se emergen nuevas formas de generar negocios en línea a través de las plataformas que toda compañía necesita para ser eficiente y exitosa. Necesitamos estar capacitados para proveer a nuestros cliente Nuevas Experiencias, con innovadores paquetes de servicios y aprender a influenciar a nuestros clientes como consultores de confianza.)

Learning Objectives
• Learn how to provide New Experiences to your clients and prospects (Aprende a proveer una nueva experiencia para Tus Clientes y Prospectos)
• Learn to package your services (Aprende a empaquetar tus servicios)
• Learn to establish your brand through influence (Aprende a establecer tu marca con influencia)

Instructor: Vanessa Ocampo and Carmen Manrique
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

The Letter Arrives: Handling an IRS Examination

This course will review the IRS selection of taxpayers for examination and what clients and their representatives need to do to properly prepare and handle the exam. Emphasis will be put on the preparation for the exam documentation, and handling the request for taxpayer interview. The session will also review IRS audit techniques and frequent issues, including ethical issues, that arise for the representative.

Learning Objectives:
• Understand how taxpayers are selected for an IRS exam
• Identify issues that arise with the taxpayer’s documentation
• Identify the various audit techniques the IRS uses
• Understand the ethical dilemmas that frequently arise when handling an IRS exam

Instructor: Eric L. Green, Esq.
QuickBooks Online Certification Exam Prep (Part 3 of 3 Parts)
This session is the third part of the QuickBooks Online Certification Exam Prep course and covers Modules 9, 10, 11 and 12. (See detailed descriptions of modules under QuickBooks Online Certification Exam Prep (Summary of all 3 Parts))

This session uses the official Intuit course curriculum. If you are pursuing the 2017 QuickBooks Online Certification Path, you should attend this course.

Note: This session prepares you to take the U.S. QuickBooks Online Certification exam. Only members of the U.S. ProAdvisor Program will earn a badge for U.S. QuickBooks Online Certification on the Find-a-ProAdvisor website.

Instructor: Jason Meredith
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Intermediate
Prerequisites: A basic understanding of general accounting principles and QuickBooks Online functionality is required.
CPE Hours: 2
EA Hours: 0

TSheets Pro Certification
Attendees will be taken through a high-level overview of TSheets and the TSheets PRO Program. Key takeaways from this session include:

- An overview of TSheets
- An understanding the benefits of becoming a TSheets PRO
- How to recognize a client who might be a good fit for TSheets
- How to set up a TSheets account
- How to manage, track, and report time with TSheets
- An Overview of the TSheets + QuickBooks integration
- And more!

Learning Objectives:

- Identify the main functions and features of TSheets
- Recognize the benefits for TSheets PROs and their clients

Instructor: Dan Buckingham and Kelly Bistriceanu
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Cyber Security for You and Your Clients
This class will explore the current pattern of cyber threats and crimes with an emphasis on preventing and recovering from the effects of cyber-attack. We will look at the major target threat mechanisms predicted as targets through 2020. This class will identify the most common forms of malware impacting small businesses and individuals. We will also examine specific threat types including their modes of attack, symptoms of attack, and steps-to-take if you come under attack. The class will also identify preventative measures including ‘human based,’ ‘software based,’ and ‘hardware based.’

Learning Objectives

Upon completion of this session participants should be able to:

- List at least 5 major cyber targets posing the greatest risk potential through the year 2020
- Identify at least 5 major forms of malware impacting small businesses and individuals
- List the modes of attack of 5 specific cyber threat types
- Identify the symptoms of attack associated with 5 specific cyber threat types
- List the essential steps to take when subjected to an attack from any of 5 specific cyber threat types
- Demonstrate an understanding of the common risky ‘human behaviors’ that subject users and their targets to cyber threat, and how such behaviors can be overcome
- List at least 3 major types of software-based cyber-threat preventative applications
- Identify at least 2 major types of hardware-based cyber-threat preventative devices

Instructor: William Murphy
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Living the Dream: How You Can Have It All
Be in the business, work on the business and still put your family first? How can you do it all? Is it possible to achieve “Work-Life Harmonization”?

This course is designed to cover the most basic but most challenging concepts that a business owner faces: how to balance owning a business and having a life. Come listen to Stephen King’s life lessons including: Identify your individual priorities and shifting the focus on the big picture. There are 24 hours each day; where should you spend the time?

Learning Objectives:

- Learn strategies to make your work hours have maximum impact

Instructors: Stephen King
Length: 100 minutes
Operational Consulting Part 2: Make It Work: Implementation Case Study

In Part 2 of Operational Consulting, your instructors will use an interactive case study to demonstrate the essential ingredients of a successful implementation of improved processes and new systems. In this session, the instructors will also share about implementations that were successful and what set them apart from ones that were NOT successful.

Instructors: Denise Bailey and Deborah Defer
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic, Intermediate with some Advanced concepts
Prerequisites: Attend Operational Consulting Part 1: From the Beginning: Discover, Design, Pilot and Implement
CPE Hours: 2
EA Hours: 0

How to Find the Niche that will Make you Rich

To achieve the ultimate in entrepreneurial breakthrough success requires an uncanny ability to position your company. The right niche opens potential that exploits your company’s strengths. Understand the process for identifying your marketplace niche through Mike’s in-the-trenches stories and no-nonsense approach.

Learning Objectives:
In this session, you will learn:
• How to pick a niche, and measure its potential
• The myths about niches (that wrongly cause people to avoid them)
• The fastest way to become an influencer in your niche.
• How to become an authority in your niche (even if you will never, ever, ever do public speaking)

Instructor: Mike Michalowicz
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Value Pricing: The Secret Formula for a Better Way to Price your Services

ACE-Approved: This course qualifies for 2 credits for Intuit’s Advanced Continuing Education (ACE) program.

In this research-based session, best-selling author Mark Wickersham FCA reveals:
• How to value price your accounting and bookkeeping services
• Why quoting a single fixed price is crazy (most of your competitors are making this big mistake)
• The 7-step value pricing formula guaranteed to get you a better price every single time
3 strategies for making your price seem really, really small
What every accounting professional wishes they were taught on day one... this secret will change the profits of bookkeeping and accounting firms forever

Learning Objectives
At the end of this session you will know:
- Exactly how to implement value pricing – no theory, just practical steps
- How to be more valuable so that more businesses want to work with you
- How to present your prices so that more people buy from you and at higher prices

Instructor: Mark Wickersham
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Tax Liens & Tax Levies: Dealing with IRS Enforcement
When the IRS seeks to collect a back tax, it has several very powerful tools at its disposal: the federal tax lien and the federal tax levy. This panel will discuss how and when the IRS chooses to utilize its collection tools, and the options the client has to either avoid them or deal with them once they are in place.

Learning Objectives:
- Understand how the federal tax lien and tax levy function
- Identify the opportunities the taxpayer has to have tax liens either discharged, subordinated or removed
- Understand how tax levies work and how clients can have them released

Instructor: Eric L. Green, Esq.
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

4:00 pm – Main Stage Event

Monday, June 5, 2017

7:00 am – Power Breakfasts

Power Breakfasts – Please check back for more information later.

Everything You Need to Stay Connected from the Cloud
In this power breakfast session, we’ll share tips and tricks that will enable you to take your productivity to the next level using highly secure, cloud-based tools. Whether you’re a seasoned expert or simply
interested in learning more, attend this session to get a closer look at Citrix’s all-in-one solutions, including ShareFile, RightSignature and ShareConnect.

Learning Objectives:

By attending this session, you will:

- Discover how ShareFile can help you securely share files, sync documents and collaborate with clients seamlessly on any device, at any time.
- Learn how RightSignature can cut your admin time by up to 93% with legally-binding e-signatures that fit right into your work day.
- Discover how ShareConnect provides simple remote access to files, applications, servers and internal databases from any device without compromising security.

Instructors: Adrian Phillips & Hope Blankenship
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Minutes to Moments: 4 Ways to Build Your Practice and Make the Most of Every Minute
TSheets CEO Matt Rissell has dedicated more than a decade of his life to tracking the most valuable resource on the planet: Time. It’s his mission to help accountants and business owners everywhere make the most of the minutes they spend at work, so they can have more moments for the things in life that really matter. What if you had an extra hour every single day because you changed one thing in your daily routine? What would you do with those 60 minutes... and with who? Matt calls it "Minutes to Moments," and in this session he’ll offer time saving tips that you and your clients can implement today.

Learning Objectives:

- Learn who to hire to build your business
- Learn what you can do to invest in yourself as a leader
- Learn why it’s worth the time to invest in relationships
- Learn how to leverage technology and create more moments outside of work

Instructor: Matt Rissell
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Latest Trends in Customer Experience
By the end of this year, 89% of marketers expect customer experience to be their primary differentiator. Join us for a discussion regarding how this trend stands to affect our profession.
Learning Objectives:

- Learn how customer experience has contributed to the success of businesses in various industries.
- Anticipate how evolving service models and technologies may affect the accounting profession.

Instructor: Chris Farrell
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1   EA Hours: 0

Serving Clients   Better and Expanding Your Business through Small Business Lending
Alternative lending options have mushroomed since the 2008 financial crisis. As a trusted advisor to small businesses, you need to know how to help clients navigate this potential minefield of fast and easy money so they can get the best solution for their business. In this course, taught by the leading online technology platform Banks use to provide SBA loans, SmartBiz Loans, will give you an overview of current small business lending options and share best practices on how to choose the best option to better serve small business clients and expand your accounting practice at the same time.

Learning Objectives:

By attending this session, you will:

- Understand current landscape of small business lending options
- Gain insights into what small businesses want from a small business lender
- Learn why SBA loans are considered the gold standard for small business loans
- Explore best practices for getting your small business clients the lowest-cost capital to grow their business

Instructor: Brent Looney
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1   EA Hours: 0

IRS Representation: The Easiest Way to Double Your Bottom Line
IRS Representation is the hottest growth area in the world of tax, and has been for years, yet most accountants do not handle these matters out of sheer ignorance of both the potential and the process. With nearly 14 million taxpayer accounts in the IRS Collection Division inventory, nearly 1 in 15 taxpayers owes money to the United States Government! Join CPA Dawn Brolin and Attorney Eric Green for this breakfast session and learn how they have worked together to build an extremely large representation practice, adding more than $100,000 to each of their respective bottom lines. This session will review what is happening in IRS representation, a quick review of the process and the role accountants play and what steps accountants should take to begin adding this high-valued service to their existing practices.
Learning Objectives:

By attending this session, you will:

- Understand the IRS Collection process
- Identify opportunities for accountants to assist clients to resolve their tax debts

Instructor: Eric L. Green, Esq. & Dawn Brolin
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

8:00 am

People’s Choice Peer-Led Apps Training
Please check back to see which apps won and will be presented in this time slot!

Apps 101: How to Select and Integrate
*Please check back later for a description of this session.*

Instructor: Michelle Long
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Strategies for the Intuit-Centric Professional
Many accounting professionals look at their clients’ QuickBooks data only within the context of tax preparation and year end accounting services. Others, like Robin Hall, have taken a step farther down the path, embracing proactive QuickBooks consulting as a year-round revenue stream. Join Robin for this game changing practice development session that will challenge you to be more proactive with your clients who use QuickBooks.

Learning Objectives
In this practice development course, you will learn:

- The unique challenges and opportunities around supporting QuickBooks software
- Proven strategies for small business software implementation and deployment
- How to leverage Intuit’s ecosystem of integrated solutions to expand the services you offer your clients
- How to use QuickBooks consulting as a funnel strategy to grow your practice

Instructor: Robin Hall
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites: None
CPE Hours: 1
EA Hours: 0

50 Minutes with Intuit
*Topic to be announced. Please check back later for more information.*

Reporting Goldmine
Learn about the lucrative opportunities and the skills you need to cash in on Financial Statement Designer, ExcelFSM and Other Integrated Reporting Applications. Custom financial reporting is in high demand and very few have the skills to fill the void.

Instructor: Dawn Scranton
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites: Understanding of accounting principles
CPE Hours: 1
EA Hours: 0

Uncovering What Your Clients Value: Asking the Right Questions
Different clients value different things. It's only by asking the right questions that we uncover what our clients truly value. The right questions help us shape the ideal client experience.

What are the right questions? Uncovering what your client truly values is a part of the sales process. This session is designed to help you define that sales process, so that it is repeatable, scalable and yet personalized to your client.

Learning Objectives:
In this session, you will learn how to:
- Identify the right type of question for the right stage of the sales process.
- The Rule of Five.
- Matching what they value to their client experience.
- Key questions to successfully close the sale.

Instructor: Damien Greathead
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

The Bold Advisor (Part 1): Firm Management Strategies that Ensure Success
The best firms today run like well-oiled machines regardless of their headcount. It is a combination of clear goals, measurable objectives, steady operating mechanisms and a collective sense of ownership and belonging. We’ll cover the key concepts that drive the best managed firms of the world and show how the most progressive firms are leveraging them to give themselves competitive advantage.

Learning Objectives:
- Review firm foundation concepts (purpose, vision, mission, values and Big Y)
• Learn how to set and measure firm goals & objectives
• Review objectives, goals, strategies and measures to ensure alignment
• Learn project ownership concepts to ensure work is completed efficiently
• Maintain visibility and ensure quality of work with proper operating mechanisms
• Understand accounting firm org design and new roles progressive firms are adding

Instructor: Ian Vacin & Carla Caldwell
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1 EA Hours: 0

Thriving in Business as a Woman: Winning over the Men of “Mad Men”
It’s not the 60’s anymore. But women still struggle for equality and respect in the workplace. Whether you are an entrepreneur and own your own firm or an employee, it’s important to gain the respect of your clients, co-workers, vendors and associates. Learn about the behaviors that may be preventing you from achieving the success you deserve. Explore the Imposter Syndrome and see how it can stop you from reaching your goals. Discover ways that your communication style affects your professional life. Join Leslie Shiner, a respected construction expert, in this exciting session where she shares ways she has created a profitable business and prominent reputation working within a man’s world. This session is for professional women as well as any man who has a woman in his life that he would like to help reach her full potential professionally, whether that is a co-worker, wife, or daughter.

Instructor: Leslie Shiner
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1 EA Hours: 0

Why Mobile Matters: Drive Efficiency and Client Delight
Today, business owners operate on the go—anytime, anywhere, from any device. There’s huge opportunity for tech-savvy accountants who help them manage their financials the same way. Konstantinos Giannakis, Director of User Experience and Mobile Product Leads at Bill.com, explores the business advantage of mobile accounting and why it delights firms and clients.

Learning Objectives:

You’ll learn:

• Why mobile client management is an accounting game-changer.
• How mobile is shaping modern businesses—and how it affects your firm.
• What Bill.com is doing to help you stay on top of the latest mobile trends.

Instructor: Konstantinos Giannakis and Tricia Lee
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
Legal Entities and the Accounting Implications
The session will review the various forms of business entities and the benefits and issues with each, including tax and accounting issues. Particular attention will be given to when each form should be considered by a client and what factors the practitioner should look at when advising a client.

Learning Objectives:
- Understand the various forms of entities that taxpayers may use when operating a business
- Identify the benefits and detriments to using each of the various forms
- Understand what issues to consider when helping a client choose the form of entity they should select for their business

Instructor: Eric L. Green, Esq.
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Mr. Spock and Homer Simpson: The Two Sides of Human Economic Behavior
While most people think of economists as seers who try to predict the future of the stock market, government deficits, unemployment, etc., this is far too parochial a view of what economists do. The really fascinating economists are engaged in the study of human behavior. The most fertile minds in economics today deal with observing the world and trying to understand it, not predict it.

This session will explore how economics can be used to explain everyday behavior, in a myriad of real life situations. By discussing the work of the most influential and seminal minds in the economics profession, attendees will gain an appreciation for how the economist views the world and the power of their theories to explain why people behave the way they do.

Learning Objectives
- Learn why economists assume people are “rational” even though, at times, this assumption seems to be false (e.g., why do we leaves tips in restaurants we will never visit again?)
- Realize that humans are comprised of both Mr. Spock—our rational side—and Homer Simpson—our irrational side, and how to optimize decisions from both
- Introduction to Behavioral Economics and our irrational tendencies: Loss-aversion; endowment and noncash effects; status quo, confirmation, hindsight, and memory biases; anchoring and framing influences
- Understand the principle of revealed preference, and why there is usually a gap between what people say and what they do

Who Should Attend
Anyone who wants to gain a better understanding of human behavior, explore the ideas of the world’s most innovative economists, as well as engaging in a thought-provoking and stimulating discussion on a
variety of everyday issues confronting people everywhere, will find this session rewarding and challenging.

Instructor: Ron Baker
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Fundamentals on How to Grow Your Practice Using Facebook

Learn the fundamentals of using Facebook to grow your business. There are many opportunities in your network that you can use to get in front of your target audience and build your brand. You can use social media as a tool to become an expert in your niche so people will think of you when they have a problem you can solve. Join Carrie Kahn as she shares her best tips and tricks that she uses daily on using Facebook to grow her business.

Learning Objectives

- How to determine if you should have a Facebook account and what kind
- Understand the difference between a Facebook page and a Facebook Group
- How to moderate a group and keep it positive
- Options with Facebook ads: Do they make sense for your business
- Should I keep my business and personal pages separate
- Ways to create a niche and build a group to find business on social media
- Useful content to post to get people to react
- What is spam? Good or bad
- Ways to avoid spending too much time and still get results from social media groups
- How to balance giving away free consulting and gaining new business
- Why Facebook etiquette is critical to your success

Instructor: Carrie Kahn
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Excel: the Spreadsheet Concept

Understanding the underlying principles of spreadsheets is the key to success in using Excel. This session is designed for the beginner user who wants to fully understand the fundamental concepts in creating and using spreadsheets ‘from the bottom up.’ Using real-life examples, you will learn to fully comprehend the spreadsheet concept, while learning many of the great features that make using Excel easier.

Learning Objectives

In this session, you will learn:

- How to navigate and highlight data like a pro
• How to lock “column titles” with Freeze Panes
• How to use the ‘Fill’ feature
• The difference between ‘dynamic’ and ‘constants’ lists
• Many shortcuts for formatting

Instructor:       Norman Axelman
Length:          50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites:   None
CPE Hours:       1
EA Hours:        0

Embracing the Cloud (En Espanol)
The Firm of the Future is NOW the Firm of the Present and our client base now reside in the Cloud. Building an accounting & tax firm in the Cloud is truly your gateway to connect with more innovative & fast growing small businesses and startups. It is more important than ever that financial professionals keep up with the rapid pace of accounting technologies and workflow efficiencies. Alongside this client online marketplace experience is the strong perception of where the future of our accounting profession is going. We are being recognized as trusted financial advisors in addition to small business strategists. This means we must provide additional value added services such as cash flow analysis, tax planning and even social media advice to help grow our client’s knowledge and business profits. Embracing the cloud is a your guaranteed ticket to stay connected and competitive in our field. The great news is that you are not on this journey alone! Take a walk on this first-time ever VIP tour and meet your strategic partners “IRL” (in real life)!

Learning Objectives:
• Why should financial professionals embrace the cloud AND
• Why is this movement so important for the Latino/Spanish Speaking professional
• How does a practice envision or transition to the Cloud - Build your PLAN
• How does your Cloud Firm Vision come to Life
• What are Cloud financial professionals doing to engage with clients and scale their cloud firms
• What are some cool apps that financial professionals are using to collaborate with their clients in the cloud

Instructor:       Mariette Martinez
Length:          50 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites:   None
CPE Hours:       1
EA Hours:        0

The Possibilities of Payroll
Please check back for a description of this session

Instructor:       Carol King
Length:          50 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
9:00 am - Main Stage Event

1:30 pm

**QuickBooks Online Advanced Certification Exam Prep (Part 1 of 5 Parts)**
This session is the first part of the QuickBooks Online Advanced Certification Exam Prep course and uses the official Intuit course curriculum. If you are pursuing the QBO Advanced Certification Path, you should attend this course.

This session covers considerations for determining when QBO is right for the client and best practices for converting to QBO. It includes a discussion of data limits, best practices for conversion using the QuickBooks Desktop conversion tool, and post-conversion work. It also discusses importing lists and starting with beginning balances.

**Learning Objectives**
- After attending this session, you will be able to:
  - Identify potential challenging scenarios and data limitations when converting from QuickBooks Desktop products
  - Recognize data that does not convert from Desktop
  - Identify post-conversion steps required to set up a company
  - Identify the sequence of steps to correctly enter beginning balances

**Instructor:** Heather Satterley  
**Length:** 100 minutes  
**Level (Basic, Intermediate, Advanced):** Advanced  
**Prerequisites:** QuickBooks Online ProAdvisor Certification  
**CPE Hours:** 2  
**EA Hours:** 0

**QuickBooks Desktop Advanced ProAdvisor Certification Exam Prep (Part 1 of 5 Parts)**
This is Part 1 of a 5-part course. The 5-part course covers the training objectives of the official QuickBooks Advanced ProAdvisor Program Certification course. Curriculum is provided by Intuit, Inc. This track is designed for QuickBooks ProAdvisors who have not yet passed the QuickBooks Advanced ProAdvisor Certification Exam.

**Instructor:** MB Raimondi  
**Length:** 100 minutes  
**Level (Basic, Intermediate, Advanced):** Advanced  
**Prerequisites:** QuickBooks Desktop ProAdvisor Certification  
**CPE Hours:** 2  
**EA Hours:** 0
QuickBooks Enterprise Solutions Certification Exam Prep (Summary of 3-Part Course)
This 3-part course consists of 6 Modules and prepares you to take the QuickBooks Desktop Enterprise 2017 Certification exam. This course uses the official Intuit course curriculum. If you are pursuing the 2017 QuickBooks Desktop Enterprise 2017 Certification Path, you should attend this course.

Module 1: Introducing QuickBooks Enterprise
This module begins with an introduction to the advantages of using QuickBooks Enterprise and to the features available among its various subscription levels. Topics include how QuickBooks Enterprise differs from QuickBooks Pro and Premier and how to determine if Enterprise is the right fit for a prospect. The presenter then describes the features, such as inventory and list management, that differentiate QuickBooks Enterprise from other QuickBooks products.

Learning Objectives:
- Determine where QuickBooks Enterprise fits within the QuickBooks product line.
- Analyze Inventory features to solve client needs
- Differentiate list management in QuickBooks Enterprise as compared to other QuickBooks desktop products
- Recognize additional QuickBooks Enterprise features that are different from other QuickBooks Desktop products

Module 2: Advanced Reporting
The goal of this module is to present the value of Advanced Reporting to clients and ProAdvisors and, to introduce the Advanced Reporting interface through examples of some easy report writing and modification tasks. After completing this module, you should be able to recognize when your current Enterprise clients can benefit from the enormous capabilities of Advanced Reporting and be able to help them visualize what Advanced Reporting can do.

Learning Objectives:
- Identify the capabilities of the software that powers Advanced Reporting
- Determine the data available in Advanced Reporting
- Recognize how Advanced Reporting operates within the Enterprise suite
- Determine the steps to set up Advanced Inventory
- Understand the importance of Advanced Reporting to the Enterprise suite and to Enterprise customers
- Understand how Advanced Reporting compares to alternatives
- Understand ways that Advanced Reporting can benefit your practice
- Identify how to enable and launch Advanced Reporting
- Recognize the basics of the Advanced Reporting interface
- Determine how to modify and create a report in Advanced Reporting
- Identify sources of help with Advanced Reporting

Module 3: Advanced Inventory
This module covers the Advanced Inventory add-on that is available only for QuickBooks Enterprise customers. Topics include the benefits of Advanced Inventory to the accounting professional and their clients. The presenter then describes the features of Advanced Inventory and how it works.

Learning Objectives:
• Describe the steps to set up Advanced Inventory
• Determine how Advanced Inventory will track the exact location of the inventory on hand
• Identify the additional features and benefits of Advanced Inventory that are not otherwise available in QuickBooks Enterprise

Module 4: Advanced Pricing
This module covers the Advanced Pricing add-on that is available only for QuickBooks Enterprise customers. Topics include the benefits of Advanced Pricing to the accounting professional and their clients. The presenter then describes the features of Advanced Pricing and how it works.

Learning Objectives:
• Identify the benefits of using Advanced Pricing
• Recognize how to set up and use Advanced Pricing

Module 5: Consulting & Implementation
This module covers identifying, consulting, and planning the implementation of QuickBooks Enterprise. The presenter provides an overview of the QuickBooks Enterprise market, including the opportunities available and benefits of expanding one’s practice to include Enterprise-level clients. The presenter then discusses ways to navigate the pre-sales strategy, plan for kick-off, and expand the project.

Learning Objectives:
• Identify Enterprise-level prospects and the benefits to your practice of engaging with them
• Identify the elements of a successful consultation
• Determine a successful implementation plan
• Identify opportunities to extend the engagement

Module 6: Installing & Setting Up
This module covers QuickBooks Enterprise installation and setup. Topics include best practices for how to prepare for and perform the installation. The presenter then describes how to set up a QuickBooks Enterprise company file and how to set up users and permissions.

Learning Objectives:
• Identify the information necessary for successfully installing QuickBooks Enterprise
• Describe how to install and configure QuickBooks Enterprise software on a network
• Determine how to set up your QuickBooks Enterprise data file in each of three different scenarios
• Recognize how setting up users and permissions is different in QuickBooks Enterprise than QuickBooks Pro/Premier

QuickBooks Desktop Enterprise Solutions Certification Exam Prep (Part 1 of 3 Parts)
This session is the first part of the QuickBooks Desktop Enterprise Certification Exam Prep course and covers Modules 1 and 2. (See detailed module descriptions above.)

This session uses the official Intuit course curriculum. If you are pursuing the 2017 QuickBooks Desktop Enterprise Solutions Certification Path, you should attend this course.

Instructor: Robin Hall
100 Minutes with Intuit

*Topic to be announced. Please check back later for a description of this session.*

**QuickBooks Online Troubleshooting**

*ACE-Approved: This course qualifies for 2 credits for Intuit’s Advanced Continuing Education (ACE) program.*

In this session, attendees will gain insight into the design and configuration of QuickBooks Online at the database level including differences between QBO and QuickBooks Desktop. The safeguards and limitations of the QBO Database will be emphasized. It will examine the basic categories of the more frequent errors associated with QuickBooks Online and their causes, and recommended steps to resolve such errors. Various tools and utilities which can be used with QuickBooks Online in manipulating your data will also be discussed.

**Learning Objectives**

Upon completion of this session, participants should be able to:

- Recognize the differences between the QB (Desktop) and QBO databases
- Identify the safeguards and limitations of the QBO database
- Recognize the major categories of QuickBooks Online errors
- Identify ‘troubleshooting’ techniques for:
  - Conversion errors
  - Operational errors
  - Banking errors
  - Payroll errors
- Identify tools for Safeguarding, Troubleshooting and Manipulating QuickBooks Online Data

**Instructor:** William Murphy

**Length:** 100 minutes

**Level (Basic, Intermediate, Advanced):** Basic to Intermediate with some Advanced concepts

**Prerequisites:** Good foundation with QuickBooks Online

**CPE Hours:** 2

**Specializing in the Contractor Industry (Part 1 of 2 Parts)**

*ACE-Approved: This course qualifies for 2 credits for Intuit’s Advanced Continuing Education (ACE) program.*
In this two-part course, you will learn the terminology, workflow, processes, job costing, insurance, and the accounting for servicing the construction industry. This class will use QuickBooks Desktop for Contractors, but will discuss solutions found in the online world as well as desktop apps. In these sessions, we will cover topics from setup to reports, include tips, work arounds, and understanding the KPI’s for the simple to the complex needs of the contractor. This class will empower you to take QuickBooks to the next level for your contractor specific needs!

Instructor: Karen Siewert  
Length: 100 minutes  
Level (Basic, Intermediate, Advanced): Intermediate  
Prerequisites: Good foundation with QuickBooks Desktop  
CPE Hours: 2  
EA Hours: 0  

Bold Advisor (Part 2): Set Your Goals and Lay Out your Plan for Success  
In this workshop-style session, you are actually going to take the time to work ON your business. You already have your mission, vision and objectives, now in this session you’re actually going to take the time to put the plan on paper. You’ll have time to think and write, and also bounce ideas off each other. The speaker will walk you through each step of the way, and ensure that you have a plan on paper when you leave.

Learning Objectives:  
In this hands-on workshop, you will work individually on your own business, and in groups to collectively:

- Review previously covered Bold Advisor concepts on firm strategy, organization & management
- Align your objectives with your overall goals for your firm
- Determine the three core, measurable objectives for your firm through 2017
- Identify the best operating mechanisms for your firm (or yourself) to achieve your goals
- Create a written plan for executing on the plan when you get back to the office

Instructor: Carla Caldwell & Ian Vacin  
Length: 100 minutes  
Level (Basic, Intermediate, Advanced): Basic  
Prerequisites: Recommend attendance of The Bold Advisor (Part 1): Firm Management Strategies that Ensure Success  
CPE Hours: 2  
EA Hours: 0

The Process-Driven Firm: From the Inside Out (Part 1)  
Great customer service starts “from the inside out.” Creating efficiencies in your firm improves profitability and strengthens your ability to provide exceptional service to your clients. This course will furnish you with sample checklists and invaluable guidance. This is a 2-part course.

Part 1 focuses on designing and developing solid internal systems and workflows for both your firm’s internal processes and the services it offers.

Learning Objectives:
- Recognize the importance of defining your processes
- Identify best practices in designing service packages
• Determine how best to address client support & communication
• Develop solution for non-standard work
• Discover how to implement a system to manage your workflow

Instructor: Laura Redmond
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Four Things to Know About Perfect Workflow
Workflow has evolved from the simple due date monitoring systems of the past to congregated, comprehensive office management systems that can organize your entire firm. We are seeing options ranging from standalone workflow systems to complete firm management systems and the choices are endless. In this session, we will explore why these systems are in such high demand, some of the successful methods used to implement them and how to get your team to embrace the changes necessary to benefit from them.

Learning Objectives:
• Find out what ground work is necessary before you implement new workflow systems.
• Discover why investigation of the tools available is necessary to insure successful implementation.
• Learn how to get teams buy in and the continued benefits from a periodic review of a well thought out workflow system.

Instructor: Michael Giardina
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Personal Productivity and Task Management (Part 1 of 2 Parts)
How’s your stress level? Are you worried about processing payroll for a client while trying to remember to pay bills for another client? Feeling a little out of control? Attend this two-part session to learn the fundamental principles of how to get organized and become more productive. We will explore David Allen’s methodology and other best practices to help you increase your productivity and reduce your stress level.

Learning Objectives
In this session, you will learn:
• The “do it, delegate it, defer it, drop it” rule
• How to reassess your goals and maintain focus
• How to plan projects and move them forward

Instructor: Barry MacQuarrie
Length: 100 minutes
What Replaces Timesheets?

Hourly billing and timesheets are inextricably linked; you cannot discuss one without the other. The reason is because both use a common measuring device: Time. Yet time is not value, nor a cost—it is a constraint. Most professionals intuitively understand they leave money on the table with the suboptimal strategy of hourly billing, yet when they turn their attention to the timesheet, their natural defenses begin to emerge. There are four primary defenses of timesheets:

1. They are a pricing tool.
2. They are a cost accounting tool.
3. They are a project management tool.
4. They measure the productivity of our professionals.

All four of these defenses have been falsified by empirical evidence from thousands of professional firms that no longer do timesheets. Despite this evidence, the most frequently asked question we receive at VeraSage Institute is “I agree with value pricing, but why must I discard my timesheets when they have so many useful purposes?”

In this session, Ron Baker will offer replacements for the timesheet that are superior for knowledge workers, offer a competitive advantage, improve future performance, and measure what matters to your clients.

Who Should Attend

Any professional who is interested in unleashing the potential of their firm’s knowledge workers will find this presentation stimulating, dynamic and thought-provoking.

Instructor: Ron Baker
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2 EA Hours: 0

Online Marketing: Strategies and Components

You are a trained astronaut (accountant), you’re a specialist on everything that has to do with piloting the shuttle (your company), and you’ve mastered the tests for medical and mental training, flying the spaceship and other mission sensitive requirements. Except one: the role of navigating outside of the spaceship and dealing with a task that is not in your wheelhouse: Marketing. Come learn how to walk on the moon without experiencing lack of oxygen or nausea.

Our class includes the following mission objectives:

- Where are YOU in the journey of online social media
- Learn the language of the five major online social media venues
- Tools that automate online social media messaging
- Planning a content calendar
• Creating goals and objectives for a sustainable social media plan

Instructor: Christine Galli
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Excel: Basic Formulas & Features
Continuing with the ‘basics’, in this session you will learn about the Sort and Filter features, how to split up data into separate columns, and how to work with Sheet Tabs.

Formulas are the ‘heart’ of the Excel program. Learn how to use the basic formulas such as SUM, AVERAGE, MAX AND MIN, and why you may not want to use the ‘Auto Sum’ feature.

Have you ever had a formula not work for you? Learn the fundamental principle of Excel that makes everything work; gain a clear understanding of Relative Cell References. Find out how to fly through your work using formulas and shortcuts, and a special trick for when the ‘copy shortcut’ won’t work.

Learning Objectives:
In this session, you will learn:
• How to use basic Excel formulas under all circumstances
• How to make ‘text’ formulas work for you
• How to combine cells using ‘concatenation’
• How to use the very useful ‘Conditional Formatting’ feature

Instructor: Norman Axelman
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites: None
CPE Hours: 2
EA Hours: 0

The Tax Man Cometh: Dealing with the IRS Collection Division
IRS Collection continues to be the hottest growth area in tax, with nearly 13.4 million taxpayer accounts in the IRS Collection Division inventory (nearly 1 in 15 taxpayers owes money to the United States government). Yet this incredible growth area still remains a mystery to many practitioners. This session will demystify IRS enforcement by explaining the IRS collection process, reviewing the IRS collection tools (Tax Liens and Tax Levies) and alternatives to resolving an outstanding tax debt, including uncollectable status, installment agreements, Offers-in-Compromise and bankruptcy.

Learning Objectives:
• Understand the IRS collection process
• Identify when the IRS utilizes each of its collection tools for tax debts owed to the IRS
• Explain the various alternatives to resolving an outstanding tax debt
Instructor: Eric L. Green, Esq.
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 2
QuickBooks Online Advanced Certification Exam Prep (Part 2 of 5 Parts)
This session is the second part of the QuickBooks Online Advanced Certification Exam Prep course and uses the official Intuit course curriculum. If you are pursuing the QBO Advanced Certification Path, you should attend this course.

This session covers considerations for determining when QBO is right for the client and best practices for converting to QBO. It includes a discussion of data limits, best practices for conversion using the QuickBooks Desktop conversion tool, and post-conversion work. It also discusses importing lists and starting with beginning balances.

Learning Objectives
- After attending this session, you will be able to:
  - Identify the various categories available in QuickBooks Online
  - Recognize the differences between class, location and job tracking and when to apply each
  - Identify methods to utilize budgets
  - Determine the steps to set up and track quantity on hand for inventory products
  - Identify job costing functionality for billable charges
  - Indicate the steps to complete customized sales workflows

QuickBooks Desktop Advanced ProAdvisor Certification Exam Prep (Part 2 of 5 Parts)
This is Part 2 of a 5-part course. The 5-part course covers the training objectives of the official QuickBooks Advanced ProAdvisor Program Certification course. Curriculum is provided by Intuit, Inc. This track is designed for QuickBooks ProAdvisors who have not yet passed the QuickBooks Advanced ProAdvisor Certification Exam. (Please see description under QuickBooks Desktop Advanced ProAdvisor Certification Exam Prep. (Part 1))

Instructor: MB Raimondi
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Advanced
Prerequisites: QuickBooks Desktop ProAdvisor Certification
CPE Hours: 2
EA Hours: 0

QuickBooks Desktop Enterprise Solutions Certification Exam Prep (Part 2 of 3 Parts)
This session is the second part of the QuickBooks Desktop Enterprise Certification Exam Prep course and covers Modules 3, 4 and 5. (See detailed module descriptions above on Monday, June 5 at 1:30 pm.)

This session uses the official Intuit course curriculum. If you are pursuing the 2017 QuickBooks Desktop Enterprise Solutions Certification Path, you should attend this course.

Instructor: Robin Hall
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Intermediate
Prerequisites: Complete 1 of the 3 most recent versions of QuickBooks Desktop Certification and good understanding of accounting principles

CPE Hours: 2

EA Hours: 0

QuickBooks Desktop Super Geek 101: Database Essentials

ACE-Approved: This course qualifies for 2 credits for Intuit’s Advanced Continuing Education (ACE) program.

This course serves as an introduction to the QuickBooks database. In addition to providing an overview of ‘how QuickBooks works,” we will also look at the structure of QuickBooks data and data-table relationships, as well as the concepts of Master and Target records and database indexes. A look at QuickBooks use of RAM Cache will also be presented along with the importance of redundancy features like the QBW.tlg (transaction log) file. The class will also examine QuickBooks Database Corruption, its forms, causes, and diagnostics along with both QuickBooks (internal) and professional repair methodologies.

Learning Objectives

Upon completion of this session participants should be able to:

• Identify how the various database components (Company file, database server, cache memory, and QB Application) work together
• Explain the concepts of: referenceid, source, target, index, and page
• Define data corruption, disk fragmentation, database fragmentation
• Identify the most common causes of database corruption
• Explain the relationship between the QBWin.log and Verify/Rebuild
• Recognize 6 ‘true’ and 1 ‘false’ LVL_Error QBWin.log messages
• Identify “when” and “how” to ‘ask for help’ in cases of corruption

Instructor: William Murphy
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Intermediate with some Advanced concepts
Prerequisites: Foundation in QuickBooks Desktop
CPE Hours: 2

Specializing in the Contractor Industry (Part 2 of 2 Parts)

ACE-Approved: This course qualifies for 2 credits for Intuit’s Advanced Continuing Education (ACE) program.

Please see description under 1:30 pm heading above.

Instructor: Karen Siewert
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Intermediate
Prerequisites: Good foundation with QuickBooks Desktop
CPE Hours: 2

EA Hours: 0
What E-Commerce Clients Really Want
Covering topics from mobile retail environment to the various aspects of online order fulfillment, customer relationship management, marketing, shopping cart options, merchant services options and other platforms, this session will provide you with information on how to service E-Commerce clients.

Learning Objectives:
- Opening your doors to E-Commerce Clients
- Recognizing and exploring the services that increase your value and expand your scope of services.

Instructor: Dawn Scranton
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

The Process-Driven Firm: From the Inside Out (Part 2)
Great customer service starts “from the inside out.” Creating efficiencies in your firm improves profitability and strengthens your ability to provide exceptional service to your clients. This course will furnish you with sample checklists and invaluable guidance. This is a 2-part course.

Part 2 focuses on the onboarding of new clients, managing client work and support, and guarding against scope creep.

Learning objectives:
- Recognize the importance of defining your processes
- Identify best practices in designing service packages
- Determine how best to address client support & communication
- Develop solution for non-standard work
- Discover how to implement a system to manage your workflow

Instructor: Laura Redmond
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Practicing in the Medical Industry
Please check back for a description of this session

Instructor: Carol King
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites: None
CPE Hours: 2
EA Hours: 0
Personal Productivity and Task Management (Part 2 of 2 Parts)

Please see description of this course above at 1:30 pm time slot. We recommend you attend Part 1 of this course at 1:30 pm in order to get the most out of Part 2.

Legal Concerns and Strategies for Accounting Professionals

It is no fun to be sued for malpractice. Lawsuits cost thousands in attorneys’ fees, time and damage to your reputation. Cybercrime incidents are a growing threat. Learn how to prepare for, and prevent, these problems.

Risk management is more than an insurance policy or procedure manual. Practical information on developing a solid insurance plan and avoiding and defending lawsuits will be discussed from the insurance and legal perspectives.

In a conference filled with cool techy stuff and accounting tools, this will be the least sexy session you’ll attend. It is the only session, however, to help reduce risk of lawsuits, privacy breach and inadequate insurance coverage. Besides obtaining the latest software and an awesome tan, you’ll sleep a little better knowing that you can minimize the risks in your practice.

Instructor: John Torvi and Jennifer Markowski
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2

Online Marketing: Implementing and Managing your Plan

Your message is clear and you know your company’s special place in the world of your chosen industry. It’s time to start honing in on that specific population. What steps do you take to launch your media blitz. How do you know if it has measurable success? What decisions will you make when you analyze the results?

Learning Objectives
By attending this session, you will learn about:

- Setting up your social media profile
- Connecting the dots between your social media and your website
- Utilizing your website and other media outlets to deliver the message
- Analyzing results of marketing efforts (Return on Investment)
- Measuring social media through your bottom line

Instructor: Christine Galli
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: Attend Online Marketing: Strategies and Components
CPE Hours: 2
EA Hours: 0
Excel: Special Features & Functions
Excel has many special features and functions that allow you to accomplish tasks quickly. For example, let’s say you have a very large spreadsheet with hundreds of blank rows throughout that you need to delete, and you cannot sort the data to separate them. What’s the quickest way to accomplish the task?

Learning Objectives
In this session, you will learn how to:

- Use the amazing Pivot Table to help you summarize data instantly
- Instantly delete all blank rows using a special feature
- Work with ‘text’ that looks like a number,
- Work with multiple columns or sheets at one time
- Use advanced filters
- Use ‘Comments’
- Use ‘Word Wrap’
- Remove duplicates
- Use ‘Find & Replace’ in some very neat ways

Instructor: Norman Axelman
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Streamlining your Process with QuickBooks Online Applications En Espanol (Simplificando tu Proceso con las Aplicaciones en QuickBooks Online)
If you are stuck with a process that does not work, if you are completely lost on how to make QuickBooks Online work for you, if you need help on how to streamline your business, you need to learn about the applications available in QuickBooks Online that will make your life easier.

(Si estas estancado en tu proceso y no funcionan. Si estas completamente perdido con QuickBooks Online. Si definitivamente necesitas ayuda para simplificar tu negocio, necesitas aprender las aplicaciones que estan disponible en QuickBooks Online que facilitaran tu vida en todo los sentidos.)

Learning Objectives
- Learn about the real process of QuickBooks Online (Aprende acerca de tu verdadero proceso con QuickBooks Online)
- Analyze the business and the different applications available in QBO (Analiza el negocio y las diferentes aplicaciones disponible en QBO)
- Discover the different options that streamline the process with QBO Apps (Descubre las diferentes opciones que agilizaran tus procesos con las aplicaciones de QBO)

Instructor: Vanessa Ocampo and Carmen Manrique
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Tuesday, June 6, 2017

7:00 am - Power Breakfasts

*Power Breakfasts – Please check back for more information later.*

For the Method Enthusiasts

Join Method reps and execs for updates from Method:HQ. We’ll be providing special announcements related to our product plans, and provide updates and discussion from out Partner program. We’ll also show off some of our favorite cool tricks and customizations done within Method.

Learning Objectives:

By attending this session, attendees will:

- Update from Method:HQ
- News on product plans
- Partner program discussion
- Showcase favorite customizations

Instructor: Jon Gamble
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Add Profitability to Your Practice with Patriot Software

Do you run payroll for your clients? With Patriot Software, you have the online tools to manage payroll for your clients while staying in control. Patriot Software collects, deposits, and files payroll taxes for your clients in all 50 states, including all local taxes.

Learning Objectives:

Join us for a live demo of Patriot Software and learn:

- Patriot’s easy-to-use interface for running a payroll, reports, creating W-2s, etc.
- How the free employee portal makes it easy for your clients’ employees to enter their time worked
- How Patriot’s time and attendance product flows seamlessly into payroll
- Two ways for your practice to run profitable payroll though Patriot’s Royalty Program

Instructor: Steven Hoffman
Length: 50 minutes
SOS Inventory – Inventory, Order Management, and Manufacturing for QuickBooks Online

SOS Inventory is the leading inventory and manufacturing solution for companies using QuickBooks Online. It also provides core operations functionality that any small business can use. This power breakfast provides an introduction to SOS Inventory and demonstrates the capabilities it adds to QuickBooks Online. Prior knowledge is not required, although familiarity with QuickBooks Online is helpful.

Learning Objectives:

Upon completion, attendees will be able to:

- Understand the basics of online inventory management and the capabilities and limitations of QuickBooks Online;
- Understand the key features of SOS Inventory and how it integrates with QuickBooks Online;
- Evaluate the appropriateness of SOS Inventory for a given client solution.

Instructor: Steven Myers
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1 EA Hours: 0

The 7 Minute Conversation Every Client Needs to Have Every Month

Join our Power Breakfast to learn how to add power to your advisory services. In one hour, we will discuss a technique that will help you convert any client, especially that “once a year” tax client, into a regular monthly or quarterly advisory engagement. No business owner wants to devote the hours it used to take to understand their businesses financial metrics. But all of them can benefit from seeing their business through the eyes of the financials a few minutes per month. During breakfast, I’ll show you a few critical items you can discuss with your clients to set them on the path to more cash in their business. After one conversation, any small business owner will want to have you on their financial management team.

Learning Objectives:

In this session, you will learn how to:

- Identify the most critical measurements of profitability in a small business
- Learn how to have a quick, but meaningful conversation about the numbers
- Introduce advisory services to all of your clients in one simple step
- Set them up for success in making more money or getting a financing request approved

Instructor: Mike Milan
Length: 50 minutes
Solving the Number One Sales Tax Problem Your SMB Clients Face: Having the Funds Available When it is Time to Pay

Do your small to mid-sized merchant clients experience difficulty paying their sales tax on time and in full, because they have used sales tax funds for operating expenses? Do you waste precious time chasing them down trying to get their payments in on time? The number one sales tax problem SMB merchants face is having the funds available when it comes time to pay. DAVO Sales Tax is the solution. DAVO’s patented process automatically impounds your client’s total sales tax collected daily, and files and pays in full and on time when due. Discover how DAVO, working with QuickBooks Online can be your sales tax solution. Truly automated sales tax has finally arrived. Check sales tax off of your to do list forever.

Learning Objectives
In this session, you will learn:

- How DAVO’s integration with QuickBooks allows us to collect, file and pay sales tax automatically, safely, and effortlessly.
- How DAVO will help your clients reduce the burden of sales tax compliance.
- In particular, how DAVO can help you help them with their sales tax cash management.
- How you can use DAVO Sales Tax to reduce your administrative burden and give you more time for more important accounting issues.

Instructor: Ryan Balfe and Owen Brown
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1 EA Hours: 0

Five Transformational Technologies to Jump Start Your Practice

In our fast paced culture, it’s necessary to leverage the transformational power of technology in order to succeed. This session will identify the core systems, methods and technology that will take your firm from good to great. Without this transformation, your business will never find that next gear where all the long hours pay off and you get to reap the joy and fulfillment of business ownership. Staying in the slow lane is no longer an option, come hear what could be the solution to you need to leverage technology in your firm.

Learning Objectives:

- Discover five transforming technologies firms need to reach the level of success owners dream of.
- Learn about new applications, processes and methods for managing a business’s needs.
- Find out what some of the latest software tools are and how they help you and your clients business.
Maximize the Benefits of Automation for You and Your Clients

New technologies are transforming traditional accounts payable (AP) departments from cost centers to strategic partners. Join this session to learn how finance professionals, and the accounting firms who serve them, are modernizing AP—and realizing huge gains in efficiency—by automating processes such as manual data entry, purchase order matching, printing and routing invoices for approvals, signatures, and printing and mailing paper checks.

MineralTree CEO BC Krishna will explore the current state of AP and the opportunities available to transform their AP departments.

Learning Objectives:

By attending this session, you will:

• Discover how automation can improve your workflow and reduce all of that paper
• Understand the effects a modern workflow can have on your firm (and your client’s) business
• Learn how automation can transform AP departments into strategic partners and revenue centers

8:00 am

People’s Choice Peer-Led Apps Training

Please check back to see which apps won and will be presented in this time slot!

The QuickBooks Online Mobile App in the Field

QuickBooks Online is the perfect software to use on a smartphone or tablet while you’re providing services to clients. The Mobile App has features the website doesn’t! Reduce paperwork by creating Estimates and Invoices onsite, with signatures. Eliminate after-the-fact accounting by using your camera to take pictures of receipts. Use third-party apps to keep track of employee timecards and schedules. In this session, we’ll demonstrate the specific workflow steps you’ll use to do your bookkeeping while in the field with your customers. The more you can do on the fly, the less you have to do in the office!

Learning Objectives
Participants in this session will learn:

- Mobile App features not on the website
- Creating and emailing Estimates, Invoices, and Sales Receipts while onsite
- Taking pictures of receipts in QBO on a smartphone to maintain a paper trail
- Managing timecards and schedules with 3rd Party Apps

Instructor: Alicia Katz Pollock
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Troubleshooting QuickBooks Desktop: Cash to Equity (Part 1)
No matter how well we train our clients and how much support we provide them, our clients make mistakes. Mistakes fall into two broad categories: Mistakes made when setting up a QuickBooks data file and mistakes made during the day to day use of the file (data entry errors). This troubleshooting course focuses on the essential diagnostics you need to perform on your clients' files to locate and repair the most common types of setup and data entry errors.

Instructor: Laura Madeira
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites: Foundation in QuickBooks Desktop
CPE Hours: 1
EA Hours: 0

50 Minutes with Intuit

Topic to be announced. Please check back later for more information on this session.

How do I do THAT in QBO?
As the ProAdvisor, there are some tricks to making your day-to-day operations easier. Some of these may seem common sense to ‘seasoned Pro’ ProAdvisors, but if you are new to the ProAdvisor role, or perhaps just new to QuickBooks Online, a few of these tricks may have escaped or been barely covered during your formal QBO ProAdvisor training. This course will cover some of those ‘nice’ and really ‘need’ to know helps that will streamline your work as a QBO ProAdvisor, while at the same time improving the services you render to your QBO clients.

Learning Objectives
In this class, we will cover areas like:

- Using a QBOA Firm Realm which allows your accounting team access to all QBO clients.
- Managing QBO user permissions
- Memorized Transactions
- Making the most of best practices for importing QuickBooks Desktop to QBO clients.
- Insuring proper set-up and use of QBO Items, Categories and Bundles,
- Properly configuring billable expenses for customer invoicing,
• Handling vendor credits for real accountability
• Using the new reconciliation in QBO
• Choosing and implementing the best Payroll choice

Instructor: Liz Scott
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Making the Most of QuickBooks Desktop In-Product Reports
QuickBooks desktop provides a lot of functionality and formatting options when writing reports. Many features go undiscovered until you really dig deep into the software and combine options. Join us to learn how to more efficiently create and use reports. In this session we will be working in QuickBooks 2017 Accountants Edition, not off PowerPoint slides.

Learning Objectives
• Examine the power of report preferences
• Explore filtering and the advantage of combining filters
• Identify ‘hidden filters’
• Explore the power of memorized reports
• Discuss how to present reports to your clients

Instructor: Gale Kirsoop
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Personal & Professional Branding
What exactly is a professional brand and how do successful people and companies cultivate a strong brand? In this interactive session, participants will gain an understanding of the building blocks of a great brand and how they can leverage branding to build long-term, sustainable relationships with their audience.

Learning Objectives
In this session, you will learn to:
• Understand what a brand consists of
• Identify strong brands, both business and personal, and what makes them successful
• Define your own brand personality
• Create a successful brand identity for yourself and/or your business

Instructor: Davis Snedeker
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
Advanced Value Pricing: How to Calculate a Profitable Price Without Timesheets

Customers hate the uncertainty of hourly prices. But how do you come up with a fixed, value-based price up front that ensures you will make a profit? In this session, Mark Wickersham will take you through advanced pricing techniques, including:

- The concept of *Optimal Pricing* and how you use it to maximize your profit
- How to use *price psychology* so that the price resistance melts away
- The 7 types of questions *you must ask* to understand the scope of work and what your client values

Learning Objectives:

At the end of this sessions you will know:

- How to discover the maximum price any customer is willing and able to pay
- Why your clients have no idea what the right price is and how you can use that to your advantage
- What questions to ask a client so you come up with the right price

Instructor: Mark Wickersham
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Top Ten Business Myths

Ideas have consequences, and bad ideas are a competitive disadvantage. This presentation is dedicated to the possibility that many myths exist about business and it would be more optimal to discard these bad ideas. Thinking about these myths is difficult because it requires us to examine some of our most deeply held beliefs about the way the business world works. Economist John Maynard Keynes said, “The difficulty lies, not in the new ideas, but in escaping from the old ones.” Philosopher Bertrand Russell added, “The resistance to a new idea increases as the square of its importance.” Join radio talk-show host Ron Baker as he falsifies each of these ten myths, and posits better ideas that will enhance your organization’s wealth-creating capacity. He asks you not to think *like* him, but to think *with* him.

Learning Objectives

Attendees will learn:

- Why so much of the conventional wisdom is more *conventional* than actual wisdom
- How to overcome these myths, and focus on what truly matters in your company

Instructor: Ron Baker
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0
Content Marketing: Beyond Social Media

In this session, you will learn the basics of all the most common digital marketing strategies and tactics practiced by professional services businesses. You will learn the importance and significance that CONTENT has in your marketing to help you get more leads, but most important the right leads. You will learn enough to have a starting point to decide how to immediately implement tactical content as part of marketing strategy to grow your practice.

Learning Objectives:
- Understand the fundamental differences between marketing strategy and marketing tactics
- Define the significance of Price and Positioning, the importance it has in both marketing strategy and tactics, and how it helps shape your message
- Identify the differences between social media promotions (network-based communication) vs. content (search-based communication)
- Understand the impact of content-based marketing with SEO on your website
- List some actionable content marketing tactics based on the unique positioning and strategy of your practice

Instructor: Hector Garcia  
Length: 50 minutes  
Level (Basic, Intermediate, Advanced): Basic  
Prerequisites: None  
CPE Hours: 1  
EA Hours: 0

Excel: Additional Features and Formulas

Some of the more versatile and powerful formulas and features in Excel allow you to accomplish hours of work in just a matter of seconds as well as maintain data integrity.

Learning Objectives
In this session, you will learn how to:
- Protect your data by employing levels of protection for cells and worksheets
- Use ‘IF’ formulas and nested IF statements using ‘Text’ formulas
- Use formulas to analyze data and check for errors
- Work with ‘dates’ in Excel

Instructor: Norman Axelman  
Length: 50 minutes  
Level (Basic, Intermediate, Advanced): Intermediate  
Prerequisites: Basic knowledge of Excel  
CPE Hours: 1  
EA Hours: 0

Representing the Innocent Spouse

Couples can often save significant tax dollars by filing a joint tax return, and many practitioners generally default to having their client-couples file a joint return. With a joint return, however, comes joint liability. This session will discuss the issue of joint liability and seeking innocent spouse relief from a
joint liability when a spouse believes they should not be responsible for the tax debt owed to the government. The session will cover the various forms of innocent spouse relief, how and when to seek it and how to make the request and document your client’s case.

Learning Objectives:
- Understand the various forms of innocent spouse relief
- Identify when to utilize each form of innocent spouse relief
- Understand how to document your client’s case when requesting innocent spouse relief

Instructor: Eric Green, Esq.
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

9:00 am Main Stage

1:30 pm

QuickBooks Online Advanced Certification Exam Prep (Part 3 of 5 Parts)
This session is the third part of the QuickBooks Online Advanced Certification Exam Prep course and uses the official Intuit course curriculum. If you are pursuing the QBO Advanced Certification Path, you should attend this course.

This session covers how to set up and create special transactions in QBO for common business applications. This session also covers use of advanced features in QBO.

Learning Objectives
After attending this session, you will be able to:
- Determine when to utilize special transactions
- Recognize the steps to create special transactions
- Determine the steps to utilize advanced features: Multi-currency, preparation and reporting for Forms 1099, and the Sales Tax Center.

QuickBooks Desktop Advanced ProAdvisor Certification Exam Prep (Part 3 of 5 Parts)
This is Part 3 of a 5-part course. The 5-part course covers the training objectives of the official QuickBooks Advanced ProAdvisor Program Certification course. Curriculum is provided by Intuit, Inc.
This track is designed for QuickBooks ProAdvisors who have not yet passed the QuickBooks Advanced ProAdvisor Certification Exam.
(Please see description under QuickBooks Desktop Advanced ProAdvisor Certification Exam Prep. (Part 1))

Instructor: MB Raimondi
QuickBooks Desktop Enterprise Solutions Certification Exam Prep (Part 3 of 3 Parts)

This session is the third part of the QuickBooks Desktop Enterprise Certification Exam Prep course and covers Module 6. (See detailed module descriptions above on Monday, June 5 at 1:30 pm.)

This session uses the official Intuit course curriculum. If you are pursuing the 2017 QuickBooks Desktop Enterprise Solutions Certification Path, you should attend this course.

Instructor: Robin Hall
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Intermediate
Prerequisites: Complete 1 of the 3 most recent versions of QuickBooks Desktop Certification and good understanding of accounting principles
CPE Hours: 2
EA Hours: 0

100 Minutes with Intuit

Topic to be announced. Please check back later for a description of this session.

QuickBooks Desktop Super Geek 201: Differential Diagnosis

ACE-Approved: This course qualifies for 2 credits for Intuit’s Advanced Continuing Education (ACE) program.

This course expands upon the principles instructed in QuickBooks Database Essentials. Using case studies, we will examine various techniques for differentially diagnosing the causes of QuickBooks problems ranging from poor performance to scrambled data. The course will also provide an in-depth look at the QBWin.log file and the various diagnostic and error messaging the log provides. Potential resolution and repair steps for data corruptions identified in the QBWin.log file will also be discussed. If you have an unsolved QBWin.log file, bring it for discussion during Questions & Answers, or after the session.

Learning Objectives
Upon completion of this session, participants should be able to:
• Define ways to safeguard a QuickBooks ‘crime scene’
• Interpret the ‘clues’ of QuickBooks incidents
• Differentially diagnose QuickBooks problems
• Interpret QBWin.log file error messages, and
• Identify ways to resuscitate your QuickBooks data file

Instructor: William Murphy
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Intermediate/Advanced
Prerequisites: Solid understanding of QuickBooks Database Essentials or attendance of QuickBooks Desktop Super Geek 101: Database Essentials
CPE Hours: 2

Complex Conversions: Resolving Common Issues (Case Studies)
Please check back for the description of this session.

Instructor: Laura Redmond
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Advanced
Prerequisites: None
CPE Hours: 2

The Legal Industry: A Closer Look at the Opportunities
Law firms are very unique, starting with their industry-specific accounting compliance requirements to the structure of their office staff. Then factor in the disruptive technology threats to the industry as a whole – it all spells opportunity, IF you understand the industry.

Learning Objectives:
• Explain what separates the work flow of a legal firm from other professional service organizations
• Explain what an IOLTA account is and how can they impact a lawyer on a personal level
• Examine what three (3) applications most legal practices use, or should be using, and why
• Discuss some of the expectations of working with a millennial attorney
• Discuss the untapped opportunities of working with the aging legal community

Instructor: Gale Kirsopp
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2

Using Technologies Like Evernote to Maximize Personal Productivity and Task Management
In the Personal Productivity and Task Management sessions, you learned David Allen’s principles of Getting Things Done. In this follow up session, we will introduce you to several technologies that will help you apply the principles effectively.

Instructor: Barry MacQuarrie
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: Recommend attendance of Personal Productivity and Task Management course
CPE Hours: 2

EA Hours: 0
Leadership Series Part 1: The Leader Within

Have you ever wondered what type of leader you are? During this highly interactive class, we will explore leadership assessment tools that will help you identify your own unique personality, character and other leadership traits that make you who you are.

Learning Objectives
During this class, you will:

- Learn about multiple personality assessment tools and how different types of personalities affect your leadership style
- Take a personality test that will help you identify your basic personality traits
- Learn the history of certain leaders and how they impacted those around them
- Learn the difference between personality traits and character traits
- Learn the traits of successful leaders

Instructor: Jeff Edmonds
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2

Making & Editing Videos with Camtasia and Publishing on YouTube

This session will provide an overview on how to create and edit videos using Camtasia. Attendees will also learn how they can publish videos on YouTube and drive traffic to their website.

Instructor: Hector Garcia
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2

Making Value Pricing a Reality in Your Business

You have heard you should implement value pricing in your accounting and bookkeeping practice. You may have read a book and attended a webinar on the subject. However, practical implementation still eludes you. It is time for a change. In this interactive session, Kirk Bowman will take the theory and make it tactical. You will walk out of the room with a clear understanding of how to have a “why” conversation with a customer, create options to maximize ROI for the customer, and set pricing to increase your profit. You can have happier customers and make more money by switching your business model. Kirk will show you how.

Learning Objectives:

- Learn to discover value from the customer’s perspective by having a value conversation
- Learn to create options that will have the customer asking “How can I work with you?”
- Learn to set boundaries on the scope of your proposal to set the customer up for success
- Learn how to set a price, which is an outstanding value for the customer and for yourself
In this session, we continue our survey of Excel's fabulous formulas and features.

**Learning Objectives**

In this session, you will learn how to use the following:

- The amazing VLookup formula and how to fix the ‘problem’ when the VLookup does not work
- Named ranges
- Advanced formulas you can use to check for errors
- The MID and FIND formulas to extract information from cells
- Goal Seek feature

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**Implement QuickBooks Online in Latin America**

*En Espanol (Implementar QuickBooks Online en America Latina)*

New to QuickBooks Online? Do not know the correct process on how to start your company with QuickBooks Online? Need to configure in the settings and don't know how will it affect your company? Need to set up your Sales Taxes? Then you need to attend this session and learn about the right and correct way to implement QuickBooks Online for your country. (Nuevo en QuickBooks Online? No sabes el proceso correcto para iniciar tu empresa en Quickbooks Online? Necesitas configurar tus preferencias y no sabes como afectaran a tu empresa? Necesitas establecer tus Impuestos de Venta? Entonces necesitas asistir a esta clase y aprender acerca de la forma correcta como implementar QuickBooks Online para tu pais.)

**Learning Objectives**

- Learn the steps to set up your company in QuickBooks Online. (Aprende como establecer tu empresa con QuickBooks Online.)
- Start downloading your bank and credit card transaction easy and fast. (Comienza a descargar tus transacciones bancarias y de tarjeta de credito de manera facil y rapida.)
- Implement your sales taxes in QuickBooks Online and understand how does it apply for your country. (Implementa tus Impuestos de Venta en QuickBooks Online y entiende como se aplica en tu pais.)
Resolving a Business’s Payroll Tax Nightmare

The number one reason why businesses get into tax trouble is payroll taxes: keeping the tax dollars is the easiest loan to take and the hardest to pay back! This session will explain the consequences of not paying over the payroll taxes, what can be done to mitigate the damage, and how to handle the IRS assessment of the Trust Fund Recovery Penalty against responsible owners and employees.

Learning Objectives:

- Understand the assessment procedures for businesses and business owners liable for unpaid payroll taxes
- Identify who may be a responsible party for the Trust Fund Recovery Penalty
- Understand how to help taxpayers resolve unpaid payroll tax liabilities

Instructor: Eric L. Green, Esq.

4:10 pm – Main Stage Event

5:20 pm

People’s Choice Peer-Led Apps Training

Please check back to see which apps won and will be presented in this time slot!

QuickBooks Payments Merchant Processing, from Swipe to Automation

Speed up your A/R with integrated QuickBooks Merchant Services. Square, Stripe and PayPal may be familiar and ubiquitous, but they can be hard to manage in QuickBooks. Instead, QB Payments fully integrates with QuickBooks Online, saving time and frustration. ProAdvisors even get wholesale rates, which you can pass on to your customers. Swipe credit cards in the field using the QBO Mobile App, or GoPayment. Email invoices with a Pay Now button. Create recurring sales receipts that charge your clients automatically. QB Payments makes it easy for your customers to pay you!

Learning Objectives

Upon completion of this session, participants will know:

- How to sign up for QB Payments and get reduced ProAdvisor rates
- How to swipe cards using the original and EMV readers
- How to automate customer payments
Troubleshooting QuickBooks Desktop: Cash to Equity (Part 2)

In this two-part course, sharpen your QuickBooks troubleshooting skills using QuickBooks Accountant Desktop 2017.

Have you ever experienced difficulty in troubleshooting or correcting your client’s QuickBooks data entry errors? If you answered yes to this, then you will not want to miss this intensive two-part course.

Case studies will be provided to you for your participation during the course to facilitate training based on actual client file issues. Leave this course more prepared to work accurately and efficiently with your clients’ QuickBooks files.

Learning Objectives

After attending this course, you will be able to

- Recognize how to spot errors efficiently when troubleshooting a QuickBooks file
- Identify the best method for correcting client setup or data entry errors in QuickBooks

Instructor:
Laura Madeira

Length:
50 minutes

Level (Basic, Intermediate, Advanced):
Intermediate to Advanced

Prerequisites:
None

CPE Hours: 1
EA Hours: 0

50 Minutes with Intuit

Topic to be announced. Please check back later for a description of this session.

Training QuickBooks Online End Users

As many new users embrace QBO, we, the ProAdvisor, are often in a position of training the end user. This session breaks down how to screen a new QBO user’s needs, assess their abilities, create a step-by-step training plan and thoughts about how to price it.

Instructor:
Liz Scott

Length:
50 minutes

Level (Basic, Intermediate, Advanced):
Basic

Prerequisites:
None

CPE Hours: 1
EA Hours: 0

Making the Most of Generating Reports in QuickBooks Online

YES, reporting in QBO is very different from QB desktop. If you’re trying to create reports the same way, you are frustrated. In this session, we will be working in QBO, not off PowerPoint slides, constructing
several useable reports, and memorize them with your branding then sharing the reports on a weekly schedule.

Learning Objectives
- Identify a starting point in building a custom report
- Discuss filters and columns and their relationship
- Illustrate how to brand your customized reports
- Organize My Custom reports from your client’s perspective
- Review how to share scheduled reports

Instructor: Gale Kirsopp
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Restaurant Industry Tips and Tricks

The restaurant industry is a large segment of the US economy, employing over 10% of the overall U.S. workforce. There are over 1 million restaurants in the U.S., 70% of which are single-unit operations according to the National Restaurant Association. This session covers how to use QuickBooks and QuickBooks Online to manage restaurant accounting. You will learn tips and tricks for recording daily sales, handling paid outs, and managing sales tax reporting. You will also gain a better understanding of issues related to tip reporting.

Learning Objectives:
- Use Sales Receipts to record daily sales
- Use Custom Fields to improve operational insight
- Manage cash paid out of the register
- Customize QuickBooks and QuickBooks Online to manage sales tax reporting needs
- Understand how to account for tips collected

Instructor: Stacey Byrne
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Learn Effective Communication with Millennials, Gen. X and Boomers

There is a lot of buzz around generational cohorts (Millennials, Gen. X, and Baby Boomers). Gaining an understanding of the differences between and the differences within each age cohort is important to drive effective marketing activities. This session will take an in depth look at the generational differences as well as look at the market potential of Boomers, Generation X, and Millennials.

Learning Objectives
In this session, you will learn how to effectively communicate with Boomers, Generation X, and Millennials to:

- Grow your customer base
- Retain your customers
- Manage cross-generational teams

Instructor: Steven Hoffman
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Value Pricing: Interactive Case Studies
We understand the concept of Value Pricing. But putting the theory into practice can be challenging. In this interactive session, three practitioners, at different stages along the “Value Pricing Continuum,” will share the stories of their journeys and the wisdom they have gained in the process.

Moderators: Mark Wickersham and Kirk Bowman
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

How to Communicate the Value of Outsourced Bookkeeping & Advisory Services
Gone are the days of selling time and transactions. In today’s competitive world, it's about the value you and your firm can bring to the table. Like beauty, value is in the eye of the beholder. What is important to one client may or may not be important to another. In this session, you will learn simple strategies to identify client needs and pain points and how to turn them into value propositions. Your instructor, Judie McCarthy, will also provide a summary of her top 10 benefits of outsourced bookkeeping.

Learning Objectives
- How to assess client needs and pain points
- Understand how your service translates to value
- Top 10 benefits of outsourced bookkeeping services

Instructor: Judie McCarthy
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Leveraging the Next Generation of Social Media
Social media evolves rapidly, making it difficult to stay ahead of the trends. This session will provide participants with a future-ready outlook on social media’s fastest growing platforms: Instagram &
SnapChat. Participants will walk away with an actionable model for implementing Instagram & SnapChat in their own practice.

Learning Objectives
After attending this session, you will be able to:

• Identify the value of using Instagram & SnapChat
• Utilize tips and tricks for building an Instagram following while reinforcing your brand
• Create SnapChat Geofilters for your business
• Understand best practices for implementing social media into your overall marketing strategy

Instructor: Davis Snedeker
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1 EA Hours: 0

Excel: Special Date Formulas and Data Validation

Learning Objectives
In this session, you will learn how to use the following:

• Special date formulas to find the last day or first day of a month
• Data Validation to control user input and create controlled lists
• Basic Audit Tools
• A number of special features to help make printing easier

Instructor: Norman Axelman
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites: None
CPE Hours: 1 EA Hours: 0

Examinations of Cash Businesses

When an IRS examiner comes into any business, they focus on very particular income and expense items. However, when that business is one of the industries targeted by the IRS as a ‘cash-based business’ the focus on possible unreported income takes on a whole new significance. This session will discuss the IRS focus on cash-based businesses, and the audit techniques the IRS utilizes to try and determine if the business has unreported receipts.

Learning Objectives:

• Understand which industries are most targeted by the IRS as cash-based businesses
• Identify issues with tax returns of cash-based businesses that will be looked at by the IRS in an examination
• Understand how the IRS will seek to prove if income was received that went unreported

Instructor: Eric L. Green, Esq.
Wednesday, June 7, 2017

7:00 am – Power Breakfasts
Power Breakfasts – Please check back for more information.

Are Your Clients Killing Your Business?
You’ve heard over and over that moving to the cloud is integral to staying competitive, meeting evolving client demands, and streamlining your business processes. You understand WHY it’s important, but no one seems to cover exactly HOW it can be done. On top of that, your clients’ resistance to change can make you hesitant to make the leap to the virtual world.

What you may not know, is that what your client doesn’t do (upload & download documents via a secure portal) will kill your business. If you’re wasting time chasing paperwork, let us help you! Join us for an interactive session where we’ll not only provide you with three actionable steps to speed up document collection and simplify your workflow, but we’ll also have our experts on hand to help you apply these steps to your unique firm.

Learning Objectives:
By attending this session, you will gain:

- 3 clear, tangible steps to simplify data gathering for your clients, improve your daily workflow, and give you time to advise your clients

Instructor: Sam Santangelo and Gabrielle Fontaine
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Why 2017 is the Year to Upgrade Your Payroll Practice
We can all probably agree that 2016 was a great year for accountants to move to the cloud. In this course you will get up to speed with the latest advancements in cloud payroll and understand why modern bookkeepers and accountants are moving their practices to a new type of payroll solution. Learn from the experts at Gusto, one of the new cloud payroll providers, about how modern technology can help you take back control of your payroll practice and turn it into a strategic asset for your firm.

Instructor: Davin Fan
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic  
Prerequisites: None  
CPE Hours: 1  
EA Hours: 0  

Digital Marketing – Myths or just Maths  
The digital marketing landscape can be a confusing and often frustrating realm for your clients, but imagine a world where the costs and the value of marketing effectiveness could be measured in fact based data not opinions and speculation in reference to profitability.  

Learning Objectives:  
This session will cover:  
• Navigating Digital landscape  
• Understanding the consumer buying journey  
• Using data to make decisions on effective marketing strategies  
• Determining profitability from marketing effort  
• Expanding your value to your clients as a trusted adviser  

Instructor: Darren Clarke  
Length: 50 minutes  
Level (Basic, Intermediate, Advanced): Basic  
Prerequisites: None  
CPE Hours: 1  
EA Hours: 0  

8:00 am  

People’s Choice Peer-Led Apps Training  
Please check back to see which apps won and will be presented in this time slot!  

50 Minutes with Intuit  
*Topic to be announced. Please check back for a description of this session.*  

Tools to Solve the Problems You Don’t Know You Have - There’s an App for That  
Before smartphones, did you think calling from a pay phone, listening to tunes on a Walkman or taking a picture with a 35mm camera was a problem? Likewise, in your practice, there may be tools that make the day-to-day tasks easier, saving you time, eliminating hassles and increasing productivity. In this session, we will look at how technology (hardware and software) can simplify the day-to-day tasks, allowing you to work more efficiently, both internally and together with your clients.  

Learning Objectives  
• How to identify inefficiencies in your processes
• How the top productivity tools help to increase productivity
• How technology has transformed the way we do business

Instructor: Judie McCarthy
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1 EA Hours: 0

Revolving Door: Who is Coming to Your Front Door & How to Show Them the Backdoor
You have identified your ideal client – you have outlined and priced the services you offer – you have identified the software applications you support ... Then your phone rings. How you handle people coming to your front door impacts your entire practice. Learn from experience how to show some people the backdoor.
Learning Objectives

- Recognize the impact of defining your ideal client
- Explain how to handle the front door
  - Cold calls through your Intuit ProAdvisor site
  - Gained through your reputation – speaking / social media / networking event
  - Use some of your applications but not all of them
  - Current clients that want you to handle additional services you do not offer
- Discuss how your professional network can support you to work less hours, earn more money and build your practice
- Discuss strategies for being ‘ready’

Instructor: Gale Kirsopp
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Building a Powerful Presentation

Have you ever seen a presentation where every slide is full of boring bulleted lists? You don’t want to be that presenter! Attend this session to learn how to build powerful presentations that help you engage and inspire your audience.

Learning Objectives

In this session, you will learn:

- The process of designing effective slide presentations
- Tips and tricks to make your presentations engaging

Instructor: Barry MacQuarrie
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1
EA Hours: 0

Why Method is the #1 CRM for QuickBooks

Do you still use Excel & stickies to track notes and customer follow-ups? In this session we’ll discuss the importance of managing customer relationships in a system that integrates with QuickBooks. Discover and dive into the top 3 reasons why Method is the #1 CRM of choice when working with QuickBooks.

Learning Objectives:

- Syncing with QuickBooks
- Knowing each customer & lead
- Personalize & make it your own

Instructor: Valbon Shabani
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Content Marketing for ProAdvisors: Beyond Social Media

In this session, you will learn the basics of all the most common digital marketing strategies and tactics practiced by professional services businesses. You will learn the importance and significance that CONTENT has in your marketing to help you get more leads, but most importantly, the right leads. You will learn enough to have a starting point to decide how to immediately implement tactical content as part of marketing strategy to grow your practice.

Learning Objectives:
- Understand the fundamental differences between marketing strategy and marketing tactics
- Define the significance of Price and Positioning, the importance it has in both marketing strategy and tactics, and how it helps shape your message
- Identify the differences between social media promotions (network-based communication) vs. content (search-based communication)
- Understand the impact of content-based marketing with SEO on your website
- List some actionable content marketing tactics based on the unique positioning and strategy of your practice

Instructor: Hector Garcia
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1, EA Hours: 0

The Power of Win/Win

As we climb and grow in business, the only way to play is to have an abundant mindset and win/win outcomes. All lasting relationships are based on all parties winning. Invest an hour and rethink or refresh your method of interaction in your relationships. In our time together, we will explore how to develop Trust, Cooperation, and increase our levels of confidence and communication. The possible outcomes are many; the only lasting one is a win/win outcome.

Learning Objectives:
- How do we seek first to understand, and then to be understood
- How do we identify the key issues and concerns in a situation
- How do we invent options for others to win
- How do we maintain a win/win attitude as we propose and deliver solutions to our clients

Instructor: George Williams
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 1, EA Hours: 0
Excel: Macros – Get Ready to Automate

When you have a lot of work to do that is repetitive, Macros are your best friend!

Learning Objectives:
Learn how to:
• Record macros to automatically clean up reports (formatting, deleting or hiding columns or rows, entering formulas)
• Create a shortcut key or button to run your macro

Instructor: Norman Axelman
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Intermediate
Prerequisites: Basic understanding of Excel
CPE Hours: 1
EA Hours: 0

Criminal Tax Investigations

So what happens when the IRS decides to pursue a taxpayer or practitioner (or both) criminally? This session will discuss the various tax crimes, criminal tax procedure, where criminal tax cases come from, the role accountants can play in criminal cases acting as a ‘Kovel Accountant’, and the role tax loss plays in federal sentencing of tax defendants. There will also be a discussion of preparer cases and what the IRS looks at when deciding to prosecute a tax preparer.

Learning Objectives:
• Understand the various tax crimes
• Identify those factors that the IRS considers when deciding to pursue an investigation criminally
• Understand the role a preparer can play in assisting the attorneys in the defense of a criminal tax investigation

Instructor: Eric L. Green, Esq.
Length: 50 minutes
Level (Basic, Intermediate, Advanced): Basic and Intermediate
Prerequisites: None
CPE Hours: 1
EA Hours: 1

9:00 am – Main Stage Event

1:30 pm
QuickBooks Online Advanced Certification Exam Prep (Part 4 of 5 Parts)
This session is the fourth part of the QuickBooks Online Advanced Certification Exam Prep course and uses the official Intuit course curriculum. If you are pursuing the QBO Advanced Certification Path, you should attend this course.

This session covers report customization, reporting logic, and custom business reports. This session also covers data review and clean up, banking and reconciliation troubleshooting.
Learning Objectives
After attending this session, you will be able to:

• Recognize options to customize reports
• Identify the fundamental logic behind QuickBooks Online reports
• Indicate custom reports that are used in various business scenarios
• Identify the steps to analyze the health of a QuickBooks Online company
• Indicate the recommended troubleshooting solutions for banking and reconciliation

QuickBooks Desktop Advanced ProAdvisor Certification Exam Prep (Part 4 of 5 Parts)
This is Part 4 of a 5-part course. The 5-part course covers the training objectives of the official QuickBooks Advanced ProAdvisor Program Certification course. Curriculum is provided by Intuit, Inc. This track is designed for QuickBooks ProAdvisors who have not yet passed the QuickBooks Advanced ProAdvisor Certification Exam. (Please see description under QuickBooks Desktop Advanced ProAdvisor Certification Exam Prep. (Part 1))

Instructor: MB Raimondi  
Length: 100 minutes  
Level (Basic, Intermediate, Advanced): Advanced  
Prerequisites: QuickBooks Desktop ProAdvisor Certification  
CPE Hours: 2  
EA Hours: 0

QuickBooks Enterprise Solutions Advanced Inventory (Part 1 of 2 Parts)
In this 2-part course, we will cover the Intuit-developed add-on application called “Advanced Inventory” that includes multi-location tracking, serial number tracking or lot tracking, and FIFO inventory valuation.

Instructor: Hector Garcia  
Length: 100 minutes  
Level (Basic, Intermediate, Advanced): Basic to Intermediate  
Prerequisites: None  
CPE Hours: 2  
EA Hours: 0

Troubleshooting Apps Integration: Identify, Correct and Prevent
This session will teach attendees what to do when apps integrations go wrong. You will learn how to identify, correct and prevent common integration mistakes such as duplicate data import, incorrect mapping, and failed connections. You will also learn best practices to use when integrating multiple apps with QuickBooks.

Learning Objectives
• Recognize common errors in apps integration with QuickBooks
• Identify strategies to correct apps integration errors with QuickBooks
• Identify best practices when integrating multiple apps with QuickBooks

Instructor: Heather Satterley
Using QuickBooks Online Data Utilities: A ProAdvisor Perspective
This course is aimed at acquainting ProAdvisors with various Data Utilities that can be used with QuickBooks Online, based around practical uses of 3rd-party products for manipulating QBO data. Following an overview of QBO data access, safeguards, limitations and restrictions is presented, multiple data utilities will be demonstrated to import, extract, remove and safeguard QuickBooks Online data. (3rd party utilities demonstrated in this session may include, but not be limited to, Axis by ZedSystems, Transaction Pro Importer for Intuit App Center by Baystate Consulting, PDF2QBO by MoneyThumb, QODBC for QBO by FlexQuarters, Transaction Pro Deleter for Intuit App Center by Baystate Consulting, and SafetyNet by Jobber.)

Learning Objectives
• Demonstrate an understanding of QuickBooks Online data access methodologies, safeguards, limitations and restrictions
• Identify utilities for import of data into QuickBooks Online
• Apply practical uses for QBO Import Utilities including iiF data files, Excel/CSV data files and PDF bank statements
• Identify utilities for the extraction of data from QuickBooks Online
• Apply practical uses for QBO Data Extraction Utilities including data integration as well as data analysis and reporting
• Identify utilities for the removal/deletion of data from QuickBooks Online
• Apply practical uses for QBO Data Remover Utilities including removal of specific data types, restoring a file to day-one status
• Identify methods for safeguarding/replicating QuickBooks Online data
• Apply practical uses for QuickBooks Online data safeguarding methods to potential real-world situations

Handling Tricky Transactions in QBO
It’s one thing to know all of QBO’s menu items, but it’s something else entirely to use it for non-standard circumstances. In this session, you’ll understand how to manage these common but confusing scenarios: Bartering, Bounced Checks (both your customers’ and your own), Creating Loan Splits, Negative Merchant Service Deposits, and options for managing Client Retainers and Deposits.

Learning Objectives:
In this session, you will learn:
• Why you need to track barter trades, and how to do it
• How to code bounced checks and associated bank fees
• How to split loan payments so you can reconcile your principal
• What to do when a credit card refund causes your daily deposit to be negative
• 3 ways to track customer deposits and retainers

Instructor: Alicia Katz Pollock
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic and Intermediate
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Serving Non-Profit Organizations (Part 1 of 2 Parts)

ACE-Approved: This course qualifies for 2 credits for Intuit’s Advanced Continuing Education (ACE) program.

Your instructor will show you the best methods for tracking and reporting the unique activities of non-profit organizations such as 501(c) (3) charities, membership associations, schools and churches. You’ll also learn how to properly set up the books and enter common transactions for a typical non-profit, as well as how to fulfill internal and external reporting requirements. For each topic, the instructor will also address how to accomplish the task in QuickBooks Online.

Instructor: Gregg Bossen
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Using OneNote to Maximize Personal Productivity and Task Management

OneNote from Microsoft is a powerful and flexible tool that can help create order in our hurried, stressful and information-overloaded lives. Learn the basics of OneNote and see examples of real world applications that you can start using today. You will find that OneNote can make both your work and home life easier to navigate because all important information will be with you and your mobile device. Mastering information storage and retrieval will be a major milestone to increasing your own personal productivity. You will also learn how to use OneNote to create a simple & flexible task management system.

Learning Objectives
• Realize that conquering information overload is a jump start to increased personal productivity
• Recognize how the virtualization of the three states of information will save time and energy
• Gain a basic understanding of OneNote
• Learn real world applications to start capturing physical information with your mobile device
• Learn how to aggregate virtual (computer based) information
• Realize that numerous documents scattered around your servers, emails, Drobox, etc. is a thing of the past
• Learn best practices to start capturing the mental information in your head
• Learn the best practices to make sure you will be able to find the information once it is stored
• Learn about multiple add-ons to make OneNote even more powerful
• Learn about three different techniques to use OneNote to complement your task management procedures

Instructor: Rob Smith
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Leadership Series Part 2: Leading a High-Performance Team
In this session, your instructor will cover the keys to hiring, motivating, rewarding, and retaining high performers. Education on how to determine required competencies and making selection decisions contributes to your ability to obtain optimal performance levels. And the relationship between employee and immediate manager is a key to employee motivation, performance and retention, which contributes to positive results in Client satisfaction.

Instructor: Deborah Defer
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Method:CRM for Sales
In this session we'll walk through a day in the life of a small business manager or CEO. When information is centralized, a sales team has more time to focus on getting new business (i.e. maximizing sales), and less time on admin work. You'll see how a sales professional can use Method:CRM to track prospective customers, including notes and reminders for customer follow-ups. Keep track of the entire sales pipeline, including prospective business in each stage of your sales process. Once prospective business turns into actual business, you'll see how the transaction is recorded automatically in QuickBooks.

Learning Objectives:
• Fundamentals of Method:CRM for sales
• Prospects & leads
• Customers & contacts
• Managing sales opportunities
• Contact interactions & activities

Instructor: Valbon Shabani
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0
Fraud Defense (Part 1 of 2 Parts)

ACE-Approved: This course qualifies for 2 credits for Intuit’s Advanced Continuing Education (ACE) program.

In this 2-part course your instructor will provide essential information you need to help you and your clients defend against fraud.

Many small business advisors are coming to the realization that managing the risk of fraud for clients is more complex than managing the risk of fraud as an employee or business owner. The first session will focus on the generally accepted ethical requirements of a small business advisor and how to handle it when a client tries to disregard your ethics.

Instructor: Dawn Brolin
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Accountant-Friendly Selling: Prescribing Solutions

Selling is often approached with apprehension, tension, and even anxiety. Sign up and discover how to approach the sales process with a focus on serving and empowering business owners with confidence. We will focus on how to approach the sales process, what it is, and how you can only win with your investment of time and energy. As you face the challenge of growth, invest in a Sales/Relationship process that is simplistic and empowers you to climb with courage and confidence.

Learning Objectives
• How do we draw from the client the real needs to assess if and how we can meet them
• How do we simplify the sales process and improve our relationships
• How do we develop rapport and trust
• And more

Instructor: George Williams
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0
Excel: Visual Basic for Applications (VBA) (Part 1)
(This is when the real fun starts!)
Learn how to use the Macro Editor; create ‘Message Box’ and ‘Input’ boxes, and how to program your own code to automate repetitive tasks. Also covered is how to use ‘IF’ statements in VBA.

Case Study
Manipulate a ‘vertical’ list of addresses and set it up so it can be used for a mail merge.

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<tr>
<th>Instructor:</th>
<th>Norman Axelman</th>
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<tr>
<td>Level (Basic, Intermediate, Advanced):</td>
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<td>Prerequisites:</td>
<td>Recommend attending Excel: Macros – Get Ready to Automate</td>
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<td>CPE Hours:</td>
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Inventory Made Easy (Inventario Facil)
Most of the companies handle inventory in some way or another. If you need to learn more about how to manage inventory in the new platform of QuickBooks Online, then you need to come to this session with an open mind of the wonders that can be done in an easy way with QBO. (La mayoria de las companias manejan inventario de alguna forma u otra. Si necesitas aprender a manejar inventario en la nueva plataforma de QuickBooks Online, necesitas asistir a esta clase con una mente abierta para descubrir como manejar de manera FACIL en QBO.)

Learning Objectives
- Identify all the concepts that can be applied to Inventory. (Identifica todos los conceptos que puedes aplicar en inventario.)
- Learn how to use QBO inventory or when it is time to implement an application. (Aprende a cuando usar QBO inventario y cuando es tiempo de implementar la aplicacion.)
- Learn how to make inventory tool work for you. (Aprende a como hacer que la herramienta de inventario trabaje para ti.)

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<tr>
<th>Instructor:</th>
<th>Vanessa Ocampo and Carmen Manrique</th>
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4:10 pm

QuickBooks Online Advanced Certification Exam Prep (Part 5 of 5 Parts)
This session is the fifth part of the QuickBooks Online Advanced Certification Exam Prep course and uses the official Intuit course curriculum. If you are pursuing the QBO Advanced Certification Path, you should attend this course.
This session covers the role of the ecosystem, recommending apps, streamlining processes, and understanding app integration and functionality.

Learning Objectives
After attending this session, you will be able to:
• Identify the steps required to implement apps and train your clients
• Identify internal apps and features available in QuickBooks Online that help streamline operations
• Assess your clients’ listed and interpreted needs to make appropriate app-related recommendations
• Identify and implement the right payroll solution for your client
• Understand variables when syncing apps in QuickBooks Online
• Define differences in App functionality

QuickBooks Desktop Advanced ProAdvisor Certification Exam Prep (Part 5 of 5 Parts)
This is Part 5 of a 5-part course. The 5-part course covers the training objectives of the official QuickBooks Advanced ProAdvisor Program Certification course. Curriculum is provided by Intuit, Inc. This track is designed for QuickBooks ProAdvisors who have not yet passed the QuickBooks Advanced ProAdvisor Certification Exam. (Please see description under QuickBooks Desktop Advanced ProAdvisor Certification Exam Prep. (Part 1))

Instructor: MB Raimondi
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Advanced
Prerequisites: QuickBooks Desktop ProAdvisor Certification
CPE Hours: 2, EA Hours: 0

QuickBooks Enterprise Solutions Advanced Inventory (Part 2 of 2 Parts)
In this 2-part course, we will cover the Intuit-developed add-on application called “Advanced Inventory” that includes multi-location tracking, serial number tracking or lot tracking, and FIFO inventory valuation.

Instructor: Hector Garcia
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites: None
CPE Hours: 2, EA Hours: 0

Enhancing QuickBooks Desktop File Stability & Performance
Explore behind-the-scenes considerations involved in QuickBooks installations, the impact of data file size and methods to accelerate QuickBooks. Learn how certain uses of QuickBooks impact performance, and best practices for troubleshooting problem issues. The session also covers steps to take to minimize and prevent data loss along with best practices for backing up QuickBooks files.
Learning Objectives:
Upon completion of this session participants should be able to:

- Explain how the various database components (Company file, database server, cache memory, and QB Application) work together
- Recognize the relationship between file size and functional list limitations in relationship to QuickBooks Performance
- Review how ‘network’ configuration can impact QuickBooks performance
- Diagnose the causes of QuickBooks Performance and File problems
- Identify methods for improving QuickBooks Performance
- Recognize methods for safeguarding their QuickBooks Data

Instructor: William Murphy
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Serving Non-Profit Organizations (Part 2 of 2 Parts)

ACE-Approved: This course qualifies for 2 credits for Intuit’s Advanced Continuing Education (ACE) program.

Please see description above on Wednesday, June 7, at 1:30 pm.

Becoming an Advisor to Professional Services Firms

Professional services firms of all types offer broad opportunity to accountants, bookkeepers and consultants. Understanding the market can help you expand your market and make money by adding value.

Learning Objectives:
During this session, you will learn:
- What are Professional Services Firms
- Learning about terminology
- Accounting principles
- Transactions you should understand
- Apps that add value
- Measuring Performance

Instructor: Caren Schwartz
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites: None
CPE Hours: 2
EA Hours: 0
Implementing OneNote in Your Firm

OneNote can bring many valuable "assets" to your firm. First, OneNote can become the cornerstone of your Democratization of Knowledge. There is no easier and more efficient way to capture and communicate your intellectual capital. You will get real world examples that you can start implementing immediately. Learn of the many add-ons that can make OneNote even more powerful.

Learn how to overcome the pitfalls of multiple people using the same Notebook. You will also explore ways to "communicate" through OneNote that will save you time and energy. Learn the best practice to customize OneNote and several add-ons and how to shares these changes with your co-workers.

Learning Objectives

- Learn how OneNote can become the keystone of your firm’s Democratization of Knowledge
- See how OneNote will help you strengthen other characteristics of an Epic Firm
- Learn about the Point of Action and how OneNote can help turn data into billable action
- Recognize how the virtualization of the three states of information will save time and energy
- Learn more ways OneNote can be used to turn physical information into virtual information
- Learn numerous methods with real world examples to start aggregating virtual (computer based) information to start your intellectual capital foundation today
- Explore various concepts to start documenting mental information in your, your co-workers’ and even your clients’ heads
- Learn tips on how to find and organize information in OneNote when you have multiple people constantly adding to it
- Explore ideas and methods to communicate with others using tags and grids
- Go over customization tips of OneNote and several add-ons and how to share these changes with your co-workers

Instructor: Rob Smith
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic to Intermediate
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Leadership Series Part 3: The Effective Leader – Strategic Goal Setting and Effective Decision Making

Effective leadership can be described as creating a vision and then executing that vision. One without the other renders a leader ineffective. During this class, we will explore two of the most important activities of a leader: how to create and achieve goals and how to make good decisions.

Learning Objectives:
During this class, you will:
- Learn how to create goals based on an organization’s overall vision
- Learn the key components of executing and achieving goals
- Learn the decision-making model
- How to make fact based decisions
Method: Donor for Nonprofits and Quickbooks

Come learn about Method: Donor, the top rated fundraising and donor management software for QuickBooks. During this session, you'll see how your nonprofit can receive a donation online, sync with QuickBooks and instantly send a donor thank you letters with their tax receipt. Keep your QuickBooks accounting clean while managing both donors and donations in a simplified way with Method's nonprofit solution.

Learning Objectives:

- Solution overview
- Online donations
- Donations deep dive
- QuickBooks integration
- Key personalization features

Fraud Defense (Part 2 of 2 Parts)

ACE-Approved: This course qualifies for 2 credits for Intuit’s Advanced Continuing Education (ACE) program.

In this 2-part course your instructor will provide essential information you need to help you and your clients defend against fraud. In the second session of this two-part track, attendees will learn how designing and monitoring effective reporting systems are essential to fraud prevention and detection.

Growth Brings Complexity. Don’t Let It Overwhelm You

With growth comes complexity. That complexity usually results in organizations experiencing one or more of the following:

- Running around all day putting out fires to manage that growth?
- Responding to whichever customer shouts loudest or longest on any given day?
• Sensing that there’s a growing disconnect between staff where there once was cohesion?
• Feeling that although the organization is more successful than ever leaders are beginning to lose the pulse of the organization?
• Dropping the ball altogether in some areas?

If you can answer yes to any of those questions, you need a new perspective, a fresh look at how you do business and a realignment around your organizational goals.

Learning Objectives:

During this highly interactive session, Les McKeown from Predictable Success will build on his keynote session and give you everything you need to:

• Build the systems and processes needed to stop firefighting and allow leaders to spend more time managing the business
• Share a common vocabulary which will realign organizations around common goals
• Create a roadmap to take organizations from break-neck speed growth to profitable scalability
• Overcome the complexity in growing businesses once and for all

Instructor: Les McKeown
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Basic
Prerequisites: None
CPE Hours: 2
EA Hours: 0

Excel: Visual Basic for Applications (VBA) (Part 2)
Case Study 1: You have a file with thousands of entries including ID numbers, dates and amounts, and you need to indicate which records are duplicates based on three criteria:
• ID number
• Date
• If the amounts are exact reciprocals

Case Study 2: You need to import into QuickBooks an Excel file, but the data in the file is not complete. Use VBA to automatically fill in all required cells.

Learning Objectives:
Using the two case studies, you will learn how to:
• Use IF logic in VBA and how to use ‘For and ‘Next program code
• ‘Loop’ within the program

Instructor: Norman Axelman
Length: 100 minutes
Level (Basic, Intermediate, Advanced): Advanced
Prerequisites: Recommend attending Excel: Macros – Get Ready to Automate
CPE Hours: 2
EA Hours: 0
 Paths to the Summits

In this section, you will find the many paths you can take at Scaling New Heights 2017. Several of the paths have forks, and we are hoping this section will help you map your course.

“Living Your Dream” Path
Building a Profitable Firm you Love:  Sunday, 6/4/2017, 12:00 pm
Living the Dream: How You Can Have it All:  Sunday, 6/4/2017, 2:00 pm
Personal Productivity and Task Management (Part 1):  Monday, 6/5/2017, 1:30 pm
Personal Productivity and Task Management (Part 2):  Monday, 6/5/2017, 4:10 pm
Using Microsoft Teams to Maximize Productivity:  Tuesday, 6/6/2017, 8:00 am
Using Technologies Like Evernote to Maximize Personal Productivity and Task Management: Tuesday, 6/6/2017, 1:30 pm
Using OneNote to Maximize Personal Productivity and Task Management:  Wednesday, 6/7/2017, 1:30 pm
Implementing OneNote in Your Firm:  Wednesday, 6/7/2017, 4:10 pm

“Refining Your Practice Path”
This path has five forks:  Right Pricing Fork, Right Services Fork, Right Clients Fork, Right Processes Fork, and Right Team Fork. You may choose to follow one fork, or you may jump between them.

The Bold Advisor Pre-Conference Workshop:  Firm Purpose, Mission, Values and Big Y - Right Team Fork - Sunday, 6/4/2017, 10:00 am
Creating a Comprehensive Marketing Plan - Right Clients Fork - Sunday, 6/4/2017, 12:00 pm
Financial Analysis: Expanding Your Value-Add Services - Right Services Fork - Sunday, 6/4/2017, 12:00 pm
Operational Consulting Part 1: From the Beginning: Discover, Design, Pilot and Implement - Right Processes Fork - Sunday, 6/4/2017, 12:00 pm
How to Find the Niche that will Make you Rich - Right Clients Fork - Sunday, 6/4/2017, 2:00 pm
Operational Consulting Part 2: Make It Work: Implementation Case Study - Right Processes Fork - Sunday, 6/4/2017, 2:00 pm
Value Pricing: The Secret Formula for a Better Way to Price your Services - Right Pricing Fork - Sunday, 6/4/2017, 2:00 pm
Fundamentals on How to Grow Your Practice Using Facebook - Right Clients Fork - Monday, 6/5/2017, 8:00 am
Legal Entities and Accounting Implications - Right Processes Fork - Monday, 6/5/2017, 8:00 am

Mr. Spock and Homer Simpson: the Two Sides of Human Economic Behavior - Right Pricing Fork - Monday, 6/5/2017, 8:00 am

Reporting Goldmine - Right Services Fork - Monday, 6/5/2017, 8:00 am

Strategies for the Intuit-Centric Accounting Professional - Right Processes Fork - Monday, 6/5/2017, 8:00 am

The Bold Advisor (Part 1): Firm Management Strategies that Ensure Success - Right Team Fork - Monday, 6/5/2017, 8:00 am

Online Marketing: Strategies and Components - Right Clients Fork - Monday, 6/5/2017, 1:30 pm

Specializing in the Contractor Industry (Part 1) - Right Services Fork - Monday, 6/5/2017, 1:30 pm

The Bold Advisor (Part 2): Set Your Goals and Lay Out Your Plan for Success - Right Team Fork - Monday, 6/5/2017, 1:30 pm
The Process-Driven Firm: From the Inside Out (Part 1) - Right Processes Fork - Monday, 6/5/2017, 1:30 pm

What Replaces Timesheets - Right Pricing Fork - Monday, 6/5/2017, 1:30 pm

Legal Concerns and Strategies for Accounting Professionals - Right Processes Fork - Monday, 6/5/2017, 4:10 pm

Online Marketing: Implementing and Managing your Plan - Right Clients Fork - Monday, 6/5/2017, 4:10 pm

Specializing in the Contractor Industry (Part 2) - Right Services Fork - Monday, 6/5/2017, 4:10 pm

The Process-Driven Firm: From the Inside Out (Part 2) - Right Processes Fork - Monday, 6/5/2017, 4:10 pm

What E-Commerce Clients Really Want - Right Services Fork - Monday, 6/5/2017, 4:10 pm

Advanced Value Pricing: How to Calculate a Profitable Price Without Timesheets - Right Pricing Fork - Tuesday, 6/6/2017, 8:00 am

Content Marketing: Beyond Social Media - Right Clients Fork - Tuesday, 6/6/2017, 8:00 am

Key Performance Indicators and Key Performance Drivers (Part 1) - Right Services Fork - Tuesday, 6/6/2017, 8:00 am

Making the Most of QuickBooks Desktop In-Product Reports - Right Services Fork - Tuesday, 6/6/2017, 8:00 am

Personal and Professional Branding: Brand Yourself for Success - Right Clients Fork - Tuesday, 6/6/2017, 8:00 am

Top Ten Business Myths - Right Pricing Fork - Tuesday, 6/6/2017, 8:00 am

Leadership Series Part 1: The Leader Within - Right Team Fork - Tuesday, 6/6/2017, 1:30 pm

Making & Editing Videos with Camtasia and Publishing on YouTube - Right Clients Fork - Tuesday, 6/6/2017, 1:30 pm

Making Value Pricing a Reality in Your Business - Right Pricing Fork - Tuesday, 6/6/2017, 1:30 pm

The Legal Industry: A Closer Look at the Opportunities - Right Services Fork - Tuesday, 6/6/2017, 1:30 pm

How to Communicate the Value of Outsourced Bookkeeping & Advisory Services - Right Services Fork - Tuesday, 6/6/2017, 5:20 pm
Key Performance Indicators and Key Performance Drivers (Part 2) - Right Services Fork - Tuesday, 6/6/2017, 5:20 pm

Learn Effective Communication with Millennials, Gen. X and Boomers - Right Team Fork - Tuesday, 6/6/2017, 5:20 pm

Leveraging the Next Generation of Social Media - Right Clients Fork - Tuesday, 6/6/2017, 5:20 pm

Restaurant Industry Tips and Tricks - Right Services Fork - Tuesday, 6/6/2017, 5:20 pm

Training QBO End Users - Right Services Fork - Tuesday, 6/6/2017, 5:20 pm

Value Pricing: Interactive Case Studies - Right Pricing Fork - Tuesday, 6/6/2017, 5:20 pm

Building a Powerful Presentation - Right Clients Fork - Wednesday, 6/7/2017, 8:00 am

LinkedIn and Twitter: The How-Tos - Right Clients Fork - Wednesday, 6/7/2017, 8:00 am

Revolving Door: Who is Coming to Your Front Door & How to Show Them the Backdoor - Right Clients Fork - Wednesday, 6/7/2017, 8:00 am

The Power of Win/Win - Right Clients Fork - Wednesday, 6/7/2017, 8:00 am

Accountant Friendly Selling: Prescribing Solutions - Right Clients Fork - Wednesday, 6/7/2017, 1:30 pm

Fraud Defense (Part 1) - Right Processes Fork - Wednesday, 6/7/2017, 1:30 pm

Leadership Series Part 2: Leading High Performance Teams - Right Team Fork - Wednesday, 6/7/2017, 1:30 pm

Serving Non-Profit Organizations (Part 1) - Right Services Fork - Wednesday, 6/7/2017, 1:30 pm

Becoming an Advisor to Professional Services Firm - Right Services Fork - Wednesday, 6/7/2017, 4:10 pm

Fraud Defense (Part 2) - Right Processes Fork - Wednesday, 6/7/2017, 4:10 pm

Leadership Series Part 3: The Effective Leader – Strategic Goal Setting and Effective Decision Making - Right Team Fork - Wednesday, 6/7/2017, 4:10 pm

Serving Non-Profit Organizations (Part 2) - Right Services Fork - Wednesday, 6/7/2017, 4:10 pm

“IRS Representation” Path
The Letter Arrives: Handling an IRS Examination: Sunday, 6/4/2017, 12:00 pm
Tax Liens & Tax Levies: Dealing with IRS Enforcement: Sunday, 6/4/2017, 2:00 pm
The Tax Man Cometh: Dealing with the IRS Collection Division: Monday, 6/5/2017, 1:30 pm
Representing the Innocent Spouse: Tuesday, 6/6/2017, 8:00 am
Resolving a Business’s Payroll Tax Nightmare: Tuesday, 6/6/2017, 1:30 pm
Examinations of Cash Businesses: Tuesday, 6/6/2017, 5:20 pm
Criminal Tax Investigations: Wednesday, 6/7/2017, 8:00 am
The Tax Man Cometh: Dealing with the IRS Collection Division (Repeat): Wednesday, 6/7/2017, 1:30 pm
Resolving a Business’s Payroll Tax Nightmare (Repeat): Wednesday, 6/7/2017, 4:10 pm

“Technical Expertise” Path
This path has four forks: Apps Integration Fork, Tools & Utilities Fork, QuickBooks Desktop Fork, and the QuickBooks Online Fork. You may choose to follow one fork, or you may jump between them.

Practically Using Transaction Pro Utilities - Tools & Utilities Fork- Sunday, 6/4/2017, 12:00 pm
Cyber-Security for You and Your Clients - Tools & Utilities Fork- Sunday, 6/4/2017, 2:00 pm
Saving Hours of Data Entry with Q2Q - Tools & Utilities Fork- Sunday, 6/4/2017, 2:00 pm
Apps 101: How to Select and Integrate - Apps Integration Fork- Monday, 6/5/2017, 8:00 am
Excel: The Spreadsheet Concept - Tools & Utilities Fork- Monday, 6/5/2017, 8:00 am
People’s Choice Peer-Led Apps Training - Apps Integration Fork- Monday, 6/5/2017, 8:00 am
Excel: Basic Formulas and Features - Tools & Utilities Fork- Monday, 6/5/2017, 1:30 pm
QuickBooks Online Troubleshooting - QuickBooks Online Fork- Monday, 6/5/2017, 1:30 pm
Excel: Special Features & Functions - Tools & Utilities Fork- Monday, 6/5/2017, 4:10 pm
QuickBooks Desktop Super Geek 101: Database Essentials - QuickBooks Desktop Fork- Monday, 6/5/2017, 4:10 pm
Excel: Additional Features & Formulas - Tools & Utilities Fork- Tuesday, 6/6/2017, 8:00 am
How Do I Do THAT in QBO? - QuickBooks Online Fork- Tuesday, 6/6/2017, 8:00 am
Making the Most of QuickBooks Desktop In-Product Reports - QuickBooks Desktop Fork- Tuesday, 6/6/2017, 8:00 am
People’s Choice Peer-Led Apps Training - Apps Integration Fork- Tuesday, 6/6/2017, 8:00 am
The QuickBooks Online Mobile App in the Field - QuickBooks Online Fork- Tuesday, 6/6/2017, 8:00 am
Troubleshooting QuickBooks Cash to Equity (Part 1) - QuickBooks Desktop Fork- Tuesday, 6/6/2017, 8:00 am
Complex Conversions: Resolving Common Issues (Case Studies) - QuickBooks Online Fork- Tuesday, 6/6/2017, 1:30 pm
Excel: More Fabulous Formulas & Features - Tools & Utilities Fork - Tuesday, 6/6/2017, 1:30 pm

QuickBooks Desktop Super Geek 201: Differential Diagnosis - QuickBooks Desktop Fork - Tuesday, 6/6/2017, 1:30 pm

Enhancing QuickBooks Desktop File Stability and Performance - QuickBooks Desktop Fork - Tuesday, 6/6/2017, 4:10 pm

QuickBooks Enterprise Solutions Advanced Inventory (Part 2) - QuickBooks Desktop Fork - Tuesday, 6/6/2017, 4:10 pm

Excel: Special Date Formulas and Data Validation - Tools & Utilities Fork - Tuesday, 6/6/2017, 5:20 pm

Making the Most of Generating Reports in QuickBooks Online - QuickBooks Online Fork - Tuesday, 6/6/2017, 5:20 pm

People’s Choice Peer-Led Apps Training - Apps Integration Fork - Tuesday, 6/6/2017, 5:20 pm

QB Payments Merchant Processing, from Swipe to Automation - QuickBooks Online Fork - Tuesday, 6/6/2017, 5:20 pm

Troubleshooting QuickBooks Cash to Equity (Part 2) - QuickBooks Desktop Fork - Tuesday, 6/6/2017, 5:20 pm

Excel: Macros - Get Ready to Automate! - Tools & Utilities Fork - Wednesday, 6/7/2017, 8:00 am

People’s Choice Peer-Led Apps Training - Apps Integration Fork - Wednesday, 6/7/2017, 8:00 am

People’s Choice Peer-Led Apps Training - Apps Integration Fork - Wednesday, 6/7/2017, 8:00 am

Streamlining Your Workflow in the Cloud with Apps - Apps Integration Fork - Wednesday, 6/7/2017, 8:00 am

Tools to Solve the Problems You Don’t Know You Have (There’s an App for That) - Apps Integration Fork - Wednesday, 6/7/2017, 8:00 am

Excel: Visual Basic for Applications (VBA) Part 1 - Tools & Utilities Fork - Wednesday, 6/7/2017, 1:30 pm

Handling Tricky Transactions in QBO - QuickBooks Online Fork - Wednesday, 6/7/2017, 1:30 pm

QuickBooks Enterprise Solutions Advanced Inventory (Part 1) - QuickBooks Desktop Fork - Wednesday, 6/7/2017, 1:30 pm

Troubleshooting Apps Integration: Identify, Correct and Prevent - Apps Integration Fork - Wednesday, 6/7/2017, 1:30 pm

Using QuickBooks Online Data Utilities: A ProAdvisor Perspective - QuickBooks Online Fork - Wednesday, 6/7/2017, 1:30 pm

Excel: Visual Basic for Applications (VBA) Part 2 - Tools & Utilities Fork - Wednesday, 6/7/2017, 4:10 pm
“QuickBooks Certification” Path

This path has two forks: QuickBooks Online Certification and QuickBooks Desktop Certification.

QuickBooks Online Certification Exam Prep (Part 1) - QuickBooks Online Certification - Sunday, 6/4/2017, 10:00 am

QuickBooks Online Certification Exam Prep (Part 2) - QuickBooks Online Certification - Sunday, 6/4/2017, 12:00 pm

QuickBooks Online Certification Exam Prep (Part 3) - QuickBooks Online Certification - Sunday, 6/4/2017, 2:00 pm

QuickBooks Online Advanced Certification Exam Prep (Part 1) - QuickBooks Online Certification - Monday, 6/5/2017, 1:30 pm

QuickBooks Online Advanced Certification Exam Prep (Part 2) - QuickBooks Online Certification - Monday, 6/5/2017, 4:10 pm

QuickBooks Online Advanced Certification Exam Prep (Part 3) - QuickBooks Online Certification - Tuesday, 6/6/2017, 1:30 pm

QuickBooks Online Advanced Certification Exam Prep (Part 4) - QuickBooks Online Certification - Wednesday, 6/7/2017, 1:30 pm

QuickBooks Online Advanced Certification Exam Prep (Part 5) - QuickBooks Online Certification - Wednesday, 6/7/2017, 4:10 pm

QuickBooks Desktop Advanced ProAdvisor Certification Exam Prep (Part 1) - QuickBooks Desktop Certification - Monday, 6/5/2017, 1:30 pm

QuickBooks Desktop Enterprise Solutions Certification Exam Prep (Part 1) - QuickBooks Desktop Certification - Monday, 6/5/2017, 1:30 pm

QuickBooks Desktop Advanced ProAdvisor Certification Exam Prep (Part 2) - QuickBooks Desktop Certification - Monday, 6/5/2017, 4:10 pm

QuickBooks Desktop Enterprise Solutions Certification Exam Prep (Part 2) - QuickBooks Desktop Certification - Monday, 6/5/2017, 4:10 pm

QuickBooks Desktop Advanced ProAdvisor Certification Exam Prep (Part 3) - QuickBooks Desktop Certification - Tuesday, 6/6/2017, 1:30 pm

QuickBooks Desktop Enterprise Solutions Certification Exam Prep (Part 3) - QuickBooks Desktop Certification - Tuesday, 6/6/2017, 1:30 pm

QuickBooks Desktop Advanced ProAdvisor Certification Exam Prep (Part 4) - QuickBooks Desktop Certification - Wednesday, 6/7/2017, 1:30 pm