



INCPAS.ORG



# SMALL FIRM: BIG BUSINESS CONFERENCE

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AUGUST 17, 2017 | INDIANAPOLIS MARRIOTT EAST

CPE 8 HRS (INCLUDES UP TO 2.5 HRS ETHICS)

CLE: 1.2 HRS OF ETHICS

CONNECT | SHARE KNOWLEDGE | HAVE FUN



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CLE: 1.2 HRS OF ETHICS

*An event focused on the profitability and success of small firms ...  
and small firms only.*

**3<sup>RD</sup>**  
YEAR  
REPORTING CYCLE

**FOR MORE INFORMATION:**

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INDIANAPOLIS, IN 46240

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“The subject matter was excellent and met my particular needs fully. The speakers were very good and had great suggestions for us.”

— 2016 attendee

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Cancellation Policies: \$15 service fee for cancellations or switches received 15 business days or more prior to the program date; \$25 service fee for cancellations or switches received six to 14 business days prior to the program date; Nonrefundable registration fee for any INCPAS-sponsored conference cancellations or switches received five business days or less prior to the conference.

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# SMALL FIRM: BIG BUSINESS CONFERENCE

**7:30 a.m.**  
Registration

**7:30-8:20 a.m.** **Extra hour of CPE!**  
Optional Sponsor Session  
**Living Well Today and Tomorrow: Actionable Strategies and an Exploration of Options for your Portfolio**  
Presented by: Grabowski and Associates

**8:30-9:20 a.m.**  
Opening General Session  
**PCPS Tools and Resources to Solve your Top Issues**  
Lisa Simpson, CPA, CGMA, AICPA

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

**9:35-10:50 a.m.**  
Breakout Sessions  
**A. Small Firm Strategies for Attracting and Retaining Talent**  
Lisa Simpson, CPA, CGMA, AICPA  
**B. Bring Efficiency Back to Your Day with Microsoft Outlook**  
Steven Phelan, CPA, CITP, K2 Enterprises  
**C. Interactive Discussion: Work Flow Management - Drinking from a fire hose or squeezing water from a rock?**  
Richard Wheeler, CPA, Wheeler & Associates, PC

**10:50-11 a.m.**  
Networking Break

**11 a.m.-12:15 p.m.**  
General Session  
**Tech Tools and Gadgets for Small Firms**  
Steve Phelan, CPA, CITP, K2 Enterprises

**12:15-1 p.m.**  
Conference Luncheon and Networking

**1-2:05 p.m.**  
Breakout Sessions  
**A. The Digital Marketing Revolution for Small Business: How Local CPAs Can Beat Out the Larger Competition**  
Nick Jaworski, Circle Social, Inc.

**B. Identifying, Preserving and Transferring Practice Value**  
Larry Metzger, CPA, Indiana Business Advisors and Edwin Mysogland, CEPA, CMEA, CVA, SBA, Indiana Business Advisors

**C. Interactive Discussion: How to use Technology to make a Big Firm Impression with Small Firm Charm**  
Mary Kay Prasco, CPA, CFF, Prasco & Associates, PC

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

**2:20-3:30 p.m.**  
Breakout Sessions  
**A. Growing With Your Current Clients - It's Easier Than You Think!**  
Shad Tidler, Lushin

**B. Ethical Responsibilities and Liabilities of Transferring Clients (Ethics)**  
William Murphy, CPA, CGMA, ABV, CFF, CVA, PFS, Mallor Grodner, LLP

**C. Interactive Discussion: Ultra Tax User Group**  
Kathryn Stephens, CPA, Wheeler & Associates, PC

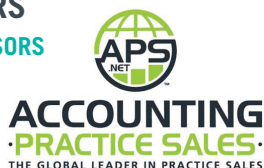
**3:30-3:40 p.m.**  
Networking Break

**3:40-4:45 p.m.**  
Closing General Session  
**Rules vs. Principles - Ethics in a "New Normal" World (Ethics)**  
Karl Ahlrichs, SHRM-SCP, SPHR, Gregory & Appel Insurance

**4:45 p.m.**  
Adjourn

## SPONSORS

### GOLD SPONSORS



# 2017 SMALL FIRM: BIG BUSINESS CONFERENCE

MEMBER ID No.

FULL NAME

FIRM/COMPANY

WORK Ph. No.

EMAIL

STREET ADDRESS (NO P.O. BOXES)

WORK / HOME  
(circle)

CITY

STATE

ZIP CODE

CHECK ALL THAT APPLY

New Address


Member of Another State Society

(LIST \_\_\_\_\_)



Lunch provided  
in the cost of  
registration.

REGISTRATION FEES METHOD OF PAYMENT

 **EARLY BIRD** (register by July 27 and save \$25)

Member Registration ..... \$184     AMEX     Discover     MasterCard

Nonmember Registration ..... \$404     Visa     Check

NAME ON CARD

CREDIT CARD No.

EXP. DATE

CVV No.

SIGNATURE

Do you require special accommodations to participate?

Yes

No

No refunds for cancellations or switches received by phone or mail after Aug. 10.

EMERGENCY INFORMATION: Add and display your emergency information on your smartphone so it will display even in lockscreen mode. Check for the feature in your phone settings or download an I.C.E. (In Case of Emergency) app.

Visit [incpas.org/smallfirm](http://incpas.org/smallfirm) to register as well as receive session descriptions, an up-to-date agenda, and program details.



# AT THIS YEAR'S CONFERENCE



- **Small Firms, Big Concerns:** Practice management tools to address challenges reported in the 2017 AICPA PCPS CPA Firm Top Issues Survey.
- **Tech Talk:** Learn the latest resources, apps and gadgets that can help your practice.
- **Ethics in the “New Normal” World:** Strategies to hold the moral and ethical high ground as you conduct business in a world of shifting standards.
- **Customize Your Day:** Choose from breakout sessions on digital marketing, staff recruitment and retention, client retention, client transfers, practice value, workflow management, Microsoft Outlook and UltraTax.

## YOUR CONFERENCE COMMUNITY



Conference registrants will have access to the CPA Center of Excellence® Small Firm: Big Business Conference Online Community, where you can:

- Get event updates and directions
- Download conference materials
- Communicate with speakers and fellow attendees
- Reference the discussions and resource materials up to a year after the conference

### [INCPAS.ORG/SMALLFIRM](https://incpas.org/smallfirm)

- Learn More
- Read Session Descriptions
- Register Online

### LOCATION:

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