

SYNERGY2019

For tax & accounting professionals

November 6-9

Workshop Catalog

Step 1: Develop Your Conference Agenda

Use the **Workshop Descriptions** and the **Workshop Schedule** to develop your agenda.

We recommend you select your “must-have” workshops first, then work the rest of your selections around the must-haves.

Workshop Descriptions

All SYNERGY workshops are presented live, with many of the most popular workshops offered more than once. Please note as you’re selecting your workshops that some workshops have **prerequisites** or **proficiency levels**, so you can ensure that you’re prepared for the session.

Use the **legend** at right in combination with the information below to help select the workshops you’d like to attend.

Session # — Don’t forget to note the session numbers (A1, C8, etc.) of the workshops you want. You’ll need those numbers for the registration process.

Level — You’ll find workshops for every proficiency **level**: Basic, Intermediate, Advanced, or Overview.

Format — Workshops are presented in one of three formats: Lecture, Panel Discussion, or Hands-On (a laptop is provided for Hands-On workshops).

Length — Most sessions run 50 or 100 minutes; however, some workshops span more than one time slot and may run 150 or 200 minutes.

Instructor — SYNERGY instructors include users who have built highly successful practices, nationally recognized experts in specialized areas of the accounting profession and our talented Thomson Reuters staff.

CPE Field of Study — You can earn one CPE credit for each 50-minute time slot, and two CPE credits for each 100-minute time slot (see CPE credit details at tax.tr.com/cs-professional-suite/training/policies).

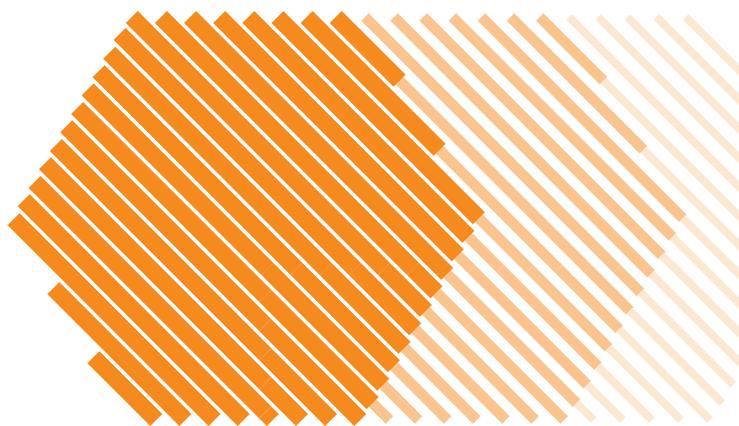
New Workshops — You’ll see a designation on workshops that cover brand new topics or have had their content updated for 2019.

Step 2: Register for Your Workshops

Register online at tax.tr.com/cs-synergy.

Need Help?

For help with registering or for more information regarding administrative policies, such as cancellations or refund requests, email cs.service@tr.com.



LEGEND



New Workshops



Hands-On Class



Lecture

Recommended for large firms



CPE Field of Study

ACC – T

Accounting – Technical

AUD – T

Auditing – Technical

BMGT – NT

Business Management & Organization – Non-Technical

C&M – NT

Communications & Marketing – Non-Technical

CS&A – NT

Computer Software & Applications – Non-Technical

IT – T

Information Technology – Technical

P/HR – NT

Personnel/Human Resources – Non-Technical

TAX – T

Taxes – Technical



THOMSON REUTERS®

Pre-Conference Workshops | Wednesday, November 6, 2019

Accounting Services Using Accounting CS

We will cover some of the basics, but then focus more on looking beyond to demonstrate the powerful, more intricate features of Accounting CS. This class will also explore some of the enhancements recently added to the application. Participants should have an understanding on how to navigate and/or setup the database for a basic bookkeeping client. Upon completion, you'll be able to:

- Navigate and update the pre-designed Accounting CS database with advanced client setup items
- Process basic bookkeeping essentials
- Setup transaction templates and automate entries
- Execute various types of data entry including at least one import
- View and modify the trial balance
- Integrate with UltraTax CS for a seamless trial balance to tax return workflow
- Print pre-defined reports and financials

Level: Basic (3 hours)

Speaker: Thomson Reuters

Session: PRE AM-1 (Wednesday, 9:00 a.m. - 12:00 p.m.)



Checkpoint Functionality: Building a Strong Foundation

Do you ever forget how to do something as soon as a class is over? This hands-on class will help increase your chance of remembering by giving you the ability to listen, watch, then do! You will learn basic search functionality in the Federal Tax practice area by observing the instructor, then immediately practicing it on your own.

Level: Basic (3 hours)

Speaker: Thomson Reuters

Session: PRE PM-4 (Wednesday, 1:00 - 4:00 p.m.)



Connecting Accounting CS and QuickBooks

We'll introduce the QuickBooks import capabilities of Accounting CS and Accounting CS Payroll. This class is recommended for firms that would like to begin integrating QuickBooks data with Accounting CS and Accounting CS Payroll. A participant should be familiar navigating in Accounting CS and have experience working in QuickBooks. Upon completion, you'll be able to:

- Evaluate the import workflows available from Intuit® products, such as QuickBooks Pro and QuickBooks Online
- Import chart of accounts and balances into Accounting CS
- Import client setup and transactions into Accounting CS
- Examine imported data and review the associated reports
- Make modifications to imported data

Level: Basic (3 hours)

Speaker: Thomson Reuters

Session: PRE PM-1 (Wednesday, 1:00 - 4:00 p.m.)



Implementing NetClient CS Portals

In this course, you will learn how NetClient CS can provide your clients 24/7 access to their financial information. Whether you're implementing NetClient CS portals for the first time, or you'd like to improve your current NetClient CS knowledge, this course is designed to give you the tools needed. Come ready to engage in open discussions with Thomson Reuters staff and your peers. Upon completion, you'll be able to:

- Navigate the administration options for setting up NetClient CS portals
- Roll out and market NetClient CS portals to staff and clients
- Establish policies around the use of NetClient CS portals
- Determine the method your firm will use to deliver client documents and files to portals
- Integrate NetClient CS with FileCabinet CS, Practice CS, and UltraTax CS

Level: Basic (3 hours)

Speaker: Thomson Reuters

Session: PRE AM-6 (Wednesday, 9:00 a.m. - 12:00 p.m.)



Implementing Onvio

During this course, we will begin to look at how to implement Onvio. This course will dive into the deep end of setup, including setup of Onvio Firm Management Advanced. You will develop action items on what to setup, change, or discuss to make sure your firm is on the right track on setting up Onvio. Those with an Onvio account, please bring your login information to make this course hands on instead of lecture. By the end of this course, you will be able to:

- Understand what considerations you will need to make sure your firm is set up correctly
- Set up firm, staff, and client information
- Develop a plan on setting up your project structure

Level: Basic (3 hours)

Speaker: Thomson Reuters

Session: PRE PM-2 (Wednesday, 1:00 - 4:00 p.m.)



Microsoft Outlook, Excel, and OneNote for Accounting Professionals

In this course, you will take your knowledge of the Microsoft Office suite to a whole new level as you learn advanced features of Microsoft Outlook, top timesaving features of Microsoft Excel, and how to utilize Microsoft OneNote. You'll walk away with several quick solutions that will make you more efficient. Upon completion of this course, you will be able to:

- Microsoft Outlook: Upon course completion, you will be better able to take advantage of Outlook's advanced email, calendar, and task functions. You will be able to create and use templates to drastically reduce time. You'll gain knowledge on how to clean up your inbox by scheduling emails as calendar appointments or tasks.
- Microsoft Excel: You will be able to apply quick tips to bring greater efficiency to using Microsoft Excel. Learn how to easily navigate, utilize timesaving functions, apply consistent formatting, and customize the status bar.

- Microsoft OneNote: We'll show you how using OneNote will change the way you capture notes and ideas, and access them on the go. OneNote is a powerful tool that will help you get and stay organized, and its integration with Outlook and the other Microsoft Office suite products will help you stay on task.

Upon completion of this course you will understand the difference between notebooks, sections, and pages, and understand the basic functionality of OneNote to begin using it to capture notes and ideas.

You'll walk away with several quick solutions that will make you more efficient. If you're new to any of these products, or have been using them for years, you won't want to miss this class! If you attend this workshop, do not attend the conference workshops as the material is the same.

Level: Intermediate (3 hours)

Speaker: Thomson Reuters

Session: PRE PM-6 (Wednesday, 1:00 - 4:00 p.m.)



Practice Forward Connect

Current Practice Forward firms are invited to participate together in addressing some key challenges in executing transition in their business. During this time, you will hear from your peers on what has been a key to their success in transitions. The topics of discussion are slated to include: Training your staff for the next step, moving legacy clients to your new model, and marketing approaches. At the conclusion of this session, you will have identified your key next steps in each of the areas. All of these topics are building on the Practice Forward methodology, and driving those changes further with your firm.

Level: Overview (5 hours)

Speaker: Thomson Reuters

Session: Wednesday, 10:00 a.m. - 4:00 p.m.



Preparing 1040 Returns Using UltraTax CS

This advanced workshop will show you how to get the most out of the UltraTax/1040. Prerequisites include a working knowledge of UltraTax/1040 and/or successful completion of UltraTax/1040 Essentials 1. Upon completion, you'll be able to:

- Data share demographic and financial information from Schedule K-1 data
- Enter tax return information for SE health insurance deduction from K-1s, state allocations, single member LLC returns, supplemental business expenses and vacation/rental home activities, and calculate foreign earned income exclusion
- Enter education expenses, QTP distribution, and complete FAFSA
- Report Minister wages and enter housing allowance
- Use the Filing Status Optimization Tool and prepare estimated tax payments
- Amend a tax return

Level: Intermediate (3 hours)

Speaker: Thomson Reuters

Session: PRE PM-5 (Wednesday, 1:00 - 4:00 p.m.)



Preparing 1120 and 1065 Returns Using UltraTax CS

This workshop will show you how to get the most out of the UltraTax/1120C, 1120S, and 1065. Prerequisites include a working knowledge of UltraTax/1120 and 1065. Upon completion, you'll be able to:

- Navigate the UltraTax CS input screens and forms
- Enter income and deductions, meals and entertainment expenses, cost of goods sold, and Schedules L and M-1, as well as add and dispose of depreciable asset data
- Integrate with Accounting CS and enter multi-state apportionment
- Set up a consolidated return
- Calculate Form 2553, enter shareholder information and change of ownership, section 1377 election, review shareholder basis, dispose of an asset with section 179 expense, enter officer compensation, and analyze Form 1120S, pages 4 and 5 calculations
- Enter a partner change of ownership and transfer of capital, use the interim closing of books method, file a 754 election, specially allocate items to partners, use the partner's basis worksheet, and data share the Schedule K-1 into the partner's return

Level: Intermediate (3 hours)

Speaker: Thomson Reuters

Session: PRE AM-5 (Wednesday, 9:00 a.m. - 12:00 p.m.)



Project Management and Workflow Using Practice CS

Discover how to manage firm workflow easily and efficiently with the Project Management module of Practice CS. This revolutionary module will streamline workflow and allow for day-to-day tracking of client projects and tasks in one central location. Participants will be shown everything from how to set up project management to real-time usage of the application. A participant should have a working knowledge of Practice CS. Upon completion, you'll be able to:

- Create project templates
- Manage projects and tasks
- Add and edit projects
- Analyze projects through calendars, reports, and dashboards
- Update projects through various methods

Level: Intermediate (3 hours)

Speaker: Thomson Reuters

Session: PRE PM-3 (Wednesday, 1:00 - 4:00 p.m.)



Setting Up Practice CS

Practice CS is a powerful and flexible practice management tool that lets you manage all of your firm's key processes from one centralized location. This hands-on workshop will help you recognize the main concepts involved in setting up your Practice CS database and identify the recommended procedures to implement Practice CS efficiently and effectively. Join us to discover how to set up Practice CS to suit your firm's needs. Participants should have a working knowledge of Practice CS. Upon completion, you'll be able to:

- Set up Practice CS at the core firm, client, and staff levels
- Design your engagement and activity setup
- Identify recommended procedures to set up your firm's database
- Enter beginning accounts receivable and work-in-process balances

Level: Basic (3 hours)

Speaker: Thomson Reuters

Session: PRE AM-3 (Wednesday, 9:00 a.m. - 12:00 p.m.)



CS&A – NT

Setting Up UltraTax CS

During this course, we are going to explore the fundamental setup options in UltraTax CS and provide a walk-through of key setup options. This workshop is highly recommended for anyone in your firm who is responsible for general program setup. Upon completion, you'll be able to:

- Install and apply updates to UltraTax CS in a streamlined and seamless process
- Configure firm-wide (system) program settings, office configurations, preparer, reviewer, and staff information and user specific options
- Manage client communications to set client email addresses and set client delivery preferences

Level: Basic (3 hours)

Speaker: Thomson Reuters

Session: PRE AM-4 (Wednesday, 9:00 a.m. - 12:00 p.m.)



TAX – T

Setup, Administration, and Maintenance in GoFileRoom and FirmFlow

In this workshop, you will gain a deeper understanding of the administration features available for GoFileRoom and FirmFlow. This session focuses on crucial tasks performed by administrators of GoFileRoom and FirmFlow. Participants should be current users of GoFileRoom or FirmFlow and have working knowledge of the Administration module. Upon completion of this course, you will have a better understanding of the following administrative functions:

- Document retention policies
- Security settings
- Staff permissions
- Workflow roll forwards
- Bulk importing and updating of workflows

Level: Intermediate (3 hours)

Speaker: Thomson Reuters

Session: PRE PM-7 (Wednesday, 1:00 - 4:00 p.m.)



CS&A – NT

UltraTax CS Meet and Greet

Join us for a special meet and greet at SYNERGY. This pre-conference session is designed specifically for our newer UltraTax CS customers to learn about the key resources available to you as a Thomson Reuters customer. You'll be able to network with other UltraTax CS customers, as well as Thomson Reuters staff, and discover ways to make the most of SYNERGY and resources available to you.

Level: : Overview (1 hour)

Speaker: Thomson Reuters

Session: Wednesday, 4:00 p.m. – 5:00 p.m.



Workpapers CS Essentials

This workshop will focus on business and individual clients, setting up those clients and engagement binders, and processing documents with Workpapers CS. No advance preparation is required. Upon completion, you'll be able to:

- Navigate the firm, security, staff, and client setup areas
- Define the trial balance, workpapers dashboard, and portlets
- Add and processes documents within an engagement binder in a variety of ways
- Use the trial balance integration with Microsoft Excel and Microsoft Word to create lead sheets, financial statements, and other documents
- Annotate PDF documents
- Use notes, sign-offs, and dynamic portlets to manage an engagement

Level: Basic (3 hours)

Speaker: Thomson Reuters

Session: PRE AM-2 (Wednesday, 9:00 a.m. - 12:00 p.m.)



CS&A – NT

Accounting

Accounting Services Using Accounting CS

We will cover some of the basics, but then focus more on looking beyond to demonstrate the powerful, more intricate features of Accounting CS. This class will also explore some of the enhancements recently added to the application. Participants should have an understanding on how to navigate and/or setup the database for a basic bookkeeping client. Upon completion, you'll be able to:

- Navigate and update the pre-designed the Accounting CS database with advanced client setup items
- Process basic bookkeeping essentials
- Setup transaction templates and automate entries
- Execute various types of data entry including at least one import
- View and modify the trial balance
- Integrate with UltraTax CS for a seamless trial balance to tax return workflow
- Print pre-defined reports and financials

Level: Basic (200 minutes)

Speaker: Thomson Reuters

Session: Part 1: C-1 (Thursday, 1:00 - 2:40 p.m.)
Part 2: D-1 (Thursday, 3:10 - 4:50 p.m.)



ACC - T

Accounts Payables and Receivables Using Accounting CS

We'll focus on the accounts payable and accounts receivable services in Accounting CS. You'll learn processes and workflow options to help make your firm and clients more efficient. This class is ideal for firms currently using or interested in Accounting CS Client Access, and for firms that offer full-service bookkeeping. Upon completion, you'll be able to:

- Design the Accounting CS database with accounts payable and receivable setup items
- Enter payables and manage payments
- Build and print invoices
- Establish templates to make data entry more efficient and accurate
- Manage customer payments and deposits
- Print deposit slips, accounts payables, and receivables reports

Level: Basic (150 minutes)

Speaker: Thomson Reuters

Session: Part 1: G-1 (Friday, 1:50 - 2:40 p.m.)
Part 2: H-1 (Friday, 3:10 - 4:50 p.m.)



ACC - T

Advanced Accounting Services Using Accounting CS

We'll go beyond the basics to demonstrate the powerful, more intricate features of Accounting CS. This class will also explore some of the enhancements recently added to the application. Participants should have attended the Accounting Services using Accounting CS workshop or have equivalent knowledge. Upon completion, you'll be able to:

- Set up transaction templates and automate entries
- Integrate with UltraTax CS and Fixed Assets CS
- Consolidate clients
- Set up a complex chart of accounts on clients with department/location needs

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: C-6 (Thursday, 1:00 - 2:40 p.m.)
I-6 (Saturday, 8:30 - 10:10 a.m.)



ACC - T

Advanced Financial Statements Formatting Using the Accounting CS Report Designer

In this lecture-style workshop, we'll explore the more advanced features of building financial statements. Participants should be familiar with navigation in the report designer and tools such as repeating levels, variables, and cell properties. Upon completion, you'll be able to:

- Use the formula tool to customize date formats
- Use conditional expressions and custom fields to standardize terminology across clients
- Build formulas to add, subtract, or divide account groupings
- Create departmental and location-based statements
- Insert and format charts
- Add analytical information to statements, such as percentages, budget variances, and financial ratios

Level: Advanced (100 minutes)

Speaker: Thomson Reuters

Session: C-7 (Thursday, 1:00 - 2:40 p.m.)
I-7 (Saturday, 8:30 - 10:10 a.m.)



ACC - T

Boost Efficiencies With Accounting CS Bank Feeds

This lecture-style workshop will review how to import bank transactions directly from a client's bank account into Accounting CS. Bank Feeds can help you save time and headaches during data entry and bank account reconciliation, and it gives you real-time access to the transactional data that impacts your client's financial accounts. After this workshop, you will be able to:

- Invite your clients to link their bank accounts to your accounting software
- Use the Bank Feeds Dashboard to import transactions directly from a client's bank account
- Categorize imported bank transactions to vendors and general ledger accounts
- Import electronic bank statements

Level: Basic (50 minutes)

Speaker: Thomson Reuters

Session: A-7 (Thursday, 9:30 - 10:20 a.m.)
B-7 (Thursday, 10:50 - 11:40 a.m.)
G-7 (Friday, 1:50 - 2:40 p.m.)



ACC - T

Financial Statements Formatting Using the Accounting CS Report Designer

Find out the basics of financial statement preparation with this hands-on workshop. We'll focus on financial statements and gain familiarity with the Accounting CS report designer. You'll receive a good overview of the design components for modifying financial statements. Upon completion of this workshop, you'll be able to:

- Insert text and variables
- Use cell, row, and column properties to define balance types and account groupings
- Use repeating levels to group accounts together and organize the statement
- Build a formula
- Create a departmental and location-based income statement
- Prepare financial ratios

Level: Basic (150 minutes)

Speaker: Thomson Reuters

Session: Part 1: E-2 (Friday, 9:30 - 11:10 a.m.)
Part 2: F-2 (Friday, 11:40 a.m. - 12:30 p.m.)
or
Part 1: G-2 (Friday, 1:50 - 2:40 p.m.)
Part 2: H-2 (Friday, 3:10 - 4:50 p.m.)



Maximizing Accounting CS Integration With the CS Professional Suite

This lecture-style workshop will explore additional methods to integrate Accounting CS with the CS Professional Suite and Onvio. Upon completion of this workshop, you'll be able to:

- Import journal entries for your firm's accounting records from Practice CS
- Export invoices to Practice CS
- Print reports to Onvio Documents
- Integrate the Workpapers Dashboard with Onvio Documents and NetClient CS file exchange
- Use custom tax codes to summarize tax schedules when integrating with UltraTax CS

Level: Basic (50 minutes)

Speaker: Thomson Reuters

Session: F-7 (Friday, 11:40 a.m. - 12:30 p.m.)



Onvio Workpapers

What's all included in Onvio? There is an Onvio Workpapers and don't miss out on this opportunity to learn about it! During this course, we will be focused on the fundamentals of Onvio Workpapers. We will explore everything from how to get clients setup with a project that utilizes Onvio Workpapers to working within Onvio Workpapers. By the completion of this class, you will be able to:

- Navigate firm and client setup areas
- Create and utilize binder templates, including adding and managing documents located in the engagement binder
- Gain an understanding on utilizing the trial balance portion of Onvio Workpapers
- Utilize integration with Microsoft Excel to create dynamic excel documents that link with Onvio Workpapers

Level: Basic (100 minutes)

Speaker: Thomson Reuters

Session: H-8 (Friday, 3:10 - 4:50 p.m.)



Preparing for the New Leases Standard (ASC 842)

The FASB's new standard on leases is a significant change to lease accounting; requiring, among other things, nearly all leases to be presented on the balance sheet. This workshop will provide participants with an example of the accounting for the most critical element of the new Leases standard; the treatment of operating leases by lessees. The example will include an explanation of the accounting, the related journal entries, a complete lease schedule and an example practice aid. This workshop will also provide participants with an overview of the key concepts important to applying the revised standard for lessees and lessors, a summary of emerging implementation issues, and recent activities of the FASB. Discussion will also include a brief overview of available tools, guidance and learning resources.

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: D-6 (Thursday, 3:10 - 4:50 p.m.)



Prepping for Year End Using Trial Balance Tools for Accounting CS and Workpapers CS

This lecture-style class will cover time-saving features in Accounting CS that speed year end processing. We'll show you how to use various importing methods to quickly populate client data and code it properly for financial statement and tax return preparation. We'll demonstrate how to build an efficient on-screen review process with the Analyze Account Activity tool. We'll also demonstrate the value of full integration with the CS Professional Suite software. After this workshop, you will be able to:

- Understand the process to import a chart of accounts through a spreadsheet import including balances and mappings
- Identify and assign tax coding for integration with UltraTax CS using account grouping and standard account mapping
- Print a set of financial statements and understand how to adjust balances for appropriate presentation in financial statements vs tax returns
- Integrate the trial balance with UltraTax CS

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: H-6 (Friday, 3:10 - 4:50 p.m.)



Proactive Management Tools for Accounting and Payroll Services Using Accounting CS

This course will provide guidance to utilize tools in Accounting CS to effectively manage your teams. Attendees should expect a focus on utilizing dashboards, reports, and firm setup options to better manage your firm for both general ledger and payroll. Firm owners, staff, and administrators will all benefit from this class. Upon completion, you'll be able to:

- Strategize new methods in which to utilize dashboards and reports
- Understand how firm setup options can improve management of accounting and payroll engagements
- Utilize firm-wide reports to better manage work
- Manage alerts and notices to stay informed and prevent inaccuracies
- Use an amortization schedule to speed up data entry

Level: Intermediate **(50 minutes)**

Speaker: Thomson Reuters

Session: Part 1: A-6 (Thursday, 9:30 - 10:20 a.m.)

Part 2: F-6 (Friday, 11:40 a.m. - 12:30 p.m.)



Revenue from Contracts With Customers (ASC 606): Lessons Learned from Public Company Adoption

This workshop is designed for public accountants who have at least a basic familiarity with ASC 606 (ASU 2014-09 or Revenue from Contracts with Customers) and who serve primarily small and mid-sized entities, non-public entities. Discussion will include a brief overview of the five-step model and financial statement disclosures; focusing on implementation issues, disclosures, and the overall financial statement impact of adoption by public companies. Upon completion of this workshop, you will better understand ASC 606 and be better prepared to help your clients assess its impact and prepare for implementation.

Level: Intermediate **(100 minutes)**

Speaker: Thomson Reuters

Session: E-6 (Friday, 9:30 - 11:10 a.m.)



Streamline Your Tax Workflow Using Workpapers CS

This lecture-style workshop will focus on the use of Workpapers CS to gather, manage, and process your tax Workpapers and trial balances. Upon completion, you'll be able to:

- Use the source document processing (OCR) feature
- Review Workpapers digitally, including sign-offs and annotations
- Prepare a proforma of your Workpapers
- Integrate your Workpapers with Microsoft Excel and Word
- Integrate Workpapers with NetClient CS File Exchange and Onvio for direct download of client files
- Use notes, sign-offs, and dynamic portlets to manage an engagement
- Achieve an integrated tax workflow saving time during individual return preparation

Level: Intermediate **(100 minutes)**

Speaker: Thomson Reuters

Session: D-8 (Thursday, 3:10 - 4:50 p.m.)

I-8 (Saturday, 8:30 - 10:10 a.m.)



Taking Charge of Your Client's Accounting System

In this lecture-style workshop, you will hear how to take charge of your client's general ledger while utilizing Accounting CS Client Access and/or QuickBooks Online. With many tools at your disposal, learn how to guide your client to the accounting system that will put you in charge. Your instructor will guide you through their experiences, teaching you how to minimize efforts while using best practices. Attendees should have working knowledge of Accounting CS and QuickBooks Online or have equivalent knowledge. After this workshop, you will be able to:

- Take control of the client's accounting system using cloud resources
- Understand how to better onboard clients who use QuickBooks Online for accounting system
- Import and export client activity with Accounting CS and QuickBooks Online
- Comparing use of Accounting CS Client Access and QuickBooks Online
- Identify challenges that may arise and understand how to overcome them

Level: Basic **(100 minutes)**

Speaker: John Seale, CPA.CITP CPA – Audit, Accounting & Tax Partner at RBSK Partners PC and Nick Wallpe

Session: C-8 (Thursday, 1:00 - 2:40 p.m.)



What's New in Accounting CS and Workpapers CS

In this workshop, you'll learn about exciting new enhancements to Accounting CS, Accounting CS Payroll, Accounting CS Client Access, and Workpapers CS. You'll also get insight into future development plans. If you currently license a product on the Accounting CS platform, or are considering it, this workshop is for you. Upon completion, you'll be ready to use the newest features of the programs, including:

- Rules and other enhancements made to Bank Feeds workflow
- Expanded integration with third-party applications
- Additional payroll alerts and notices protecting client data
- Review usability improvements and efficiencies when working with Workpapers

Level: Overview **(50 minutes)**

Speaker: Thomson Reuters

Session: B-6 (Thursday, 10:50 - 11:40 a.m.)

G-6 (Friday, 1:50 - 2:40 p.m.)



Workpapers CS Essentials

This workshop will focus on business and individual clients, setting up those clients and engagement binders, and processing documents with Workpapers CS. No advance preparation is required. Upon completion, you'll be able to:

- Navigate the firm, security, staff, and client setup areas
- Define the trial balance, Workpapers dashboard, and portlets
- Add and processes documents within an engagement binder in a variety of ways
- Use the trial balance integration with Microsoft Excel and Microsoft Word to create lead sheets, financial statements, and other documents
- Annotate PDF documents
- Use notes, sign-offs, and dynamic portlets to manage an engagement

Level: Basic (150 minutes)

Speaker: Thomson Reuters

Session: Part 1: E-1 (Friday, 9:30 - 11:10 a.m.)

Part 2: F-1 (Friday, 11:40 a.m. - 12:30 p.m.)



CS&A – NT

Auditing

Audit Sampling

This session explains the use of sampling in an audit. It incorporates PPC practice aids and is focused on the PPC approach to sampling in both substantive tests and tests of controls. It provides a solid understanding of sampling topics, while staying focused on practical issues including effectiveness and efficiency considerations. Discussions include the following:

- Alternatives to sampling and selecting appropriate tests
- Using PPC's Planning Worksheet to Determine Extent of Substantive Tests
- The factors that affect sample size and reliability
- For tests of controls:
 - Defining the population and sampling unit
 - Calculating the sample size (large and small populations)
- For tests of details:
 - Tolerable misstatement and individually significant items
 - Calculating the sample size
 - Selecting the sample items
 - Evaluating sample results and determining the level of assurance achieved
 - Using PPC's tools to plan the sample and evaluate results

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: E-11 (Friday, 9:30 - 11:10 a.m.)



Beyond Ticking and Tying: Transforming Your Assurance Process

Take an inside look at how one firm improved their assurance practice to reach new heights of efficiency, profitability, and client collaboration. Utilizing the benefits of Lean Six Sigma and data analytics tool, Inflo, to help them understand the process that was in place and design the future process they wanted to work toward, this firm has created a culture of continuous improvement. In this course, you'll learn ways to create improvements in efficiency and realization through all areas of the assurance practice: people, processes, technology, and training.

Level: Overview (100 minutes)

Speaker: Rachel M. Godwin, CPA, CGMA, Macc
Shareholder and Director of Audit and Attestation Services,
Hartmann, Blackmon & Kilgore, P.C.

Session: H-12 (Friday, 3:10 - 4:50 p.m.)



Creating Powerful Analytical Procedures

During this interactive presentation, we will discuss how to create powerful substantive analytical procedures. Topics include choosing the best type of analytical procedure considering the account, amount, risk, and other procedures, developing strong expectations, determining the level of precision, gathering evidence in support of key inputs, and evaluating the results of your tests.

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: H-11 (Friday, 3:10 - 4:50 p.m.)



Managing the Transition to Thomson Reuters' Cloud Audit Suite

In this course, we will take a look at considerations for moving your audit practice from desktop applications to the cloud with AdvanceFlow and Checkpoint Engage. Upon completion of this course, you'll be able to:

- Understand important considerations prior to conversion
- Gain a comfort level regarding how a conversion works
- Assess the benefits and impact of cloud auditing to your firm
- Know how to time and manage the transition effectively
- Access additional resources

Level: Basic (100 minutes)

Speaker: Thomson Reuters

Session: C-11 (Thursday, 1:00 - 2:40 p.m.)



Maximizing Multi-Entity Success Using Consolidations and Divisions in AdvanceFlow

In this energy filled workshop, we will bring your multi-entity needs to the next level by helping you to navigate and design your binders utilizing the power, flexibility, and multitude of options provided to you by AdvanceFlow. Participants should be familiar with the setup of Divisions and Consolidations. Upon completion of this course, you'll be able to:

- Select from proven setup designs to combine your entities in an efficient manner for your financial and/or tax needs
- Select the appropriate method of consolidation or division from the onset of your engagement
- Understand the capability of the Trial Balance Compare functionality to provide seamless flexibility in tax and financial engagements
- Streamline and improve efficiency within your engagements through proper setup

Level: Advanced (100 minutes)

Speaker: Bret Carr, CPA Hertzbach & Company, P.A.

Session: I-12 (Saturday, 8:30 - 10:10 a.m.)



Risk Assessment Leveraging PPC Tools

AICPA Peer Review Board is focusing on risk assessment due to high level of deficiencies on inspections. The primary issues they point to are:

- Insufficient or a complete lack of risk assessment procedures
- Inadequate or missing linkage between risks assessed and the planned audit response
- Misuse of third-party practice aids

This interactive session will address those common deficiencies and provide guidance on making your risk assessments matter. The discussion will also provide suggestions, guidance, and best practices to proactively address these issues using PPC's SMART Practice Aids – Risk Assessment and Checkpoint Engage.

Level: Intermediate **(100 minutes)**

Speaker: Thomson Reuters

Session: I-11 (Saturday, 8:30 - 10:10 a.m.)



Top 10 Audit Productivity Tips for Small CPA Firms

This session provides best practices in auditing non-public companies. Practical discussions on best practices will be blended with Audit Watch's top 10 tips for performing efficient and effective engagements. Focus will be placed on materiality, obtaining and documenting an understanding of the entity (including internal controls), identifying, assessing and documenting risks, creating tailored audit programs, performing effective and efficient further audit procedures, and client and engagement management.

Level: Intermediate **(100 minutes)**

Speaker: Thomson Reuters

Session: D-11 (Thursday, 3:10 - 4:50 p.m.)



Transforming Your Audit Practice

Join one of Thomson Reuters' Audit Summit graduates as they share the value of taking incremental steps toward transforming their audit practice in the digital age. You will learn about action and iteration vs. perfection, how having a growth mindset will set your team up for success, and how to turn the fear of change into the excitement of transformation.

Level: Overview **(50 minutes)**

Speaker: Audit Summit Graduate

Session: A-11 (Thursday, 9:30 - 10:20 a.m.)



Using Checkpoint for Audit Engagements

Join us to learn why (and how) to find guidance in Checkpoint on an AICPA or FASB standard, or to research an issue with an audit engagement. You will learn various search methods to efficiently find answers to your compliance questions, and time-saving features and functionality to streamline your research process in the Accounting & Auditing area in Checkpoint.

Level: Basic **(100 minutes)**

Speaker: Thomson Reuters

Session: D-12 (Thursday, 3:10 - 4:50 p.m.)



Using Data Analytics as Part of Your Audit

This course will highlight how cutting technology is helping auditors' transition from shaping and formatting data for analysis to accessing automated data visualizations and drill down capabilities to deliver better quality faster for their clients. You will learn how AI driven data analytics and visualizations help auditors identify high risk transactions and drive more effective risk assessment process.

Level: Intermediate **(50 minutes)**

Speaker: Thomson Reuters

Session: F-11 (Friday, 11:40a.m. - 12:30 p.m.)



Using GoFileRoom and FirmFlow for A&A

This course will highlight how GoFileRoom and FirmFlow can enhance your firm's A&A work. While useful as a tax product, these applications are also hugely beneficial in managing documents and tracking workflow for assurance and accounting. Upon completion of this course, you will be able to:

- Configure indexes for optimal document filing
- Recognize workflows and steps needed for efficient workflow
- Determine which audit workflow configurations best fit your firm
- Leverage firm wide and departmental reporting for maximum workload management

Level: Basic **(50 minutes)**

Speaker: Thomson Reuters

Session: B-11 (Thursday, 10:50 - 11:40 a.m.)



What's New in the Cloud Audit Suite

This course will highlight new features and capabilities of the Thomson Reuters Cloud Audit Suite. You will learn what new features have been added in 2019, upcoming new capabilities in 2020, and how to implement these features in your audit process.

Level: Overview **(50 minutes)**

Speaker: Thomson Reuters

Session: G-11 (Friday, 1:50 - 2:40 p.m.)



Client Accounting

Advanced Bookkeeping for Accounts Receivable and Accounts Payable Using Accounting CS

In this lecture-style workshop, we'll explore how to maximize the efficiency of AP/AR processing by using various tools in the system designed to reduce time and mistakes. This workshop is intended for Accounting CS users who are familiar with the basics of processing accounts payable and accounts receivable and want to expand on their knowledge. Upon completion, you'll be able to:

- Setup and use payable templates and invoice templates
- Schedule recurring payables and invoices
- Import setup and transaction data from a spreadsheet for AP/AR setup and processing
- Use Layout Designer to customize customer invoices
- Allow for client processing of AP/AR through Accounting CS Client Access

Level: Advanced **(50 minutes)**

Speaker: Thomson Reuters

Session: B-8 (Thursday, 10:50 - 11:40 a.m.)
F-8 (Friday, 11:40 a.m. - 12:30 p.m.)



ACC – T

Connecting Accounting CS and QuickBooks

We'll introduce the QuickBooks import capabilities of Accounting CS and Accounting CS Payroll. This class is recommended for firms that would like to begin integrating QuickBooks data with Accounting CS and Accounting CS Payroll. A participant should be familiar navigating in Accounting CS and have experience working in QuickBooks. Upon completion, you'll be able to:

- Evaluate the import workflows available from Intuit® products, such as QuickBooks Pro and QuickBooks Online
- Import chart of accounts and balances into Accounting CS
- Import client setup and transactions into Accounting CS
- Examine imported data and review the associated reports
- Make modifications to imported data

Level: Basic **(150 minutes)**

Speaker: Thomson Reuters

Session: Part 1: E-4 (Friday, 9:30 - 11:10 a.m.)
Part 2: F-4 (Friday, 11:40 a.m. - 12:30 p.m.)



ACC – T

Connecting With Your Small Business Clients via Thomson Reuters OnBalance

In this session, we will introduce your firm to our latest client facing solution(s), OnBalance, and show the integration with CS Professional Suite products. We will provide an overview of OnBalance capabilities and discuss how it can streamline your firm's workflow, increase efficiency, and improve collaboration with your customers. You will also understand how OnBalance helps your clients to run a better business. Upon completion, you'll be able to:

- Understand how OnBalance helps business clients stay organized
- See how the cloud-based tech offers convenience
- See integration between OnBalance with UltraTax CS and Accounting CS
- Learn what's new with OnBalance

Level: Basic **(100 minutes)**

Speaker: Thomson Reuters

Session: E-8 (Friday, 9:30 - 11:10 a.m.)



CS&A – NT

Firm & Workflow Management

AdvanceFlow ... It's Not Just for Audits

AdvanceFlow is more than just an audit solution. In this course, you will see how preparations, compilations, reviews, and tax engagements can be successfully managed in AdvanceFlow. By the end of this course, you will be able to:

- Create templates and engagements for all engagement types
- Setup a tax engagement and take advantage of tax specific features
- Integrate with your tax software
- Understand which Checkpoint products can be used to enhance your non-audit work

Level: Intermediate **(100 minutes)**

Speaker: Thomson Reuters

Session: E-13 (Friday, 9:30 - 11:10 a.m.)



Billing Using Practice CS

Participants will experience a complete time and billing walk-through, examine the setup areas, and learn about the best firm defaults for efficiency within billing. All methods of billing will be discussed and thoroughly gone through. Participants should have a working knowledge of Practice CS. Upon completion, you'll be able to:

- Setup billing defaults to easily create your billing deliverables
- Apply the most commonly used billing methods

Level: Basic **(150 minutes)**

Speaker: Thomson Reuters

Session: Part 1: E-5 (Friday, 9:30 - 11:10 a.m.)

Part 2: F-5 (Friday, 11:40 a.m. - 12:30 p.m.)



Building Powerful Dashboards and Reports With GoFileRoom, FirmFlow, and APIs

This course focuses on the opportunities created when using the GoFileRoom APIs. Specifically, this session will delve into the reporting capabilities available to firms through the APIs. Upon completion of this course, you will be able to:

- Explain what an API is
- Access the developers' community and resources
- Request your API key
- Connect to the FirmFlow APIs
- Generate a dynamic dashboard using FirmFlow data

Level: Advanced **(100 minutes)**

Speaker: Thomson Reuters

Session: I-13 (Saturday, 8:30 - 10:10 a.m.)



Creating Custom Formats in Practice CS

In this workshop, you will create custom invoices, statements, and reports with the custom format editor utilizing the different formatting tools and features to make invoice formats and reports unique to your firm. Also, learn how to design custom letters and labels incorporating your clients' real-time data in Practice CS. A participant should have a working knowledge of the setup areas in Practice CS. Upon completion, you'll be able to:

- Identify design concepts of custom formats
- Apply formatting tools
- Create custom invoices, statements, reports, labels, and letters

Level: Intermediate **(200 minutes)**

Speaker: Thomson Reuters

Session: Part 1: C-5 (Thursday, 1:00 - 2:40 p.m.)

Part 2: D-5 (Thursday, 3:10 - 4:50 p.m.)



Documents and Client Collaboration Using Onvio Firm Management

In this course, you will review some basic setup best practices of the document management and client collaboration features with Onvio Firm Management, discuss the different ways to view, add, edit, and search for documents. We will walk through all the capabilities to collaborate with clients efficiently and effectively. Upon completion of this course, you will be able to:

- Understand how to add, manage, and deliver documents within Onvio Firm Management
- Understand the client collaboration capabilities within Onvio Firm Management
- How Client Center can be utilized to help complete work effectively and efficiently

Level: Basic **(100 minutes)**

Speaker: Thomson Reuters

Session: I-14 (Saturday, 8:30 - 10:10 a.m.)



FileCabinet CS Tips for Archiving and Performance Improvement

In this workshop, you'll learn best practices for archiving to increase performance in FileCabinet CS. Participants should have a working knowledge of FileCabinet CS. Upon completion of this workshop, you'll be able to:

- Create, delete, restore, and append an archive
- Prepare FileCabinet CS data to migrate into Virtual Office CS
- Troubleshoot performance-related issues with FileCabinet CS

Level: Intermediate **(50 minutes)**

Speaker: Thomson Reuters

Session: B-15 (Thursday, 10:50 - 11:40 a.m.)



Filling Your People Pipeline

Finding talent is no longer as easy as it used to be. How do you interview to hire the intern or experienced staff that will be the best fit for your firm? This class will focus on interview skills, intern finding and keeping if they are worth it, and methods to find that unicorn, the experienced staff who will bring value to your firm and the firm's culture. During this class, you will:

- Learn interview techniques to spot and hire the ones that will fit your firm
- Learn how to seek out interns and staff and onboard them with success for a future

Level: Intermediate **(50 minutes)**

Speaker: Thomson Reuters

Session: A-12 (Thursday, 9:30 - 10:20 a.m.)



Firm Management Using GoFileRoom and FirmFlow

In this course, you will learn how to maximize your firm's GoFileRoom and FirmFlow usage to the fullest extent. This session outlines ways to use the program for proposals, internal projects, and staff and client onboarding and termination. Upon completion of this course, you will be able to:

- Identify new drawers to add to GoFileRoom
- Configure workflow for internal and client admin tasks
- Discuss opportunities to utilize the programs more extensively
- Understand how other firms manage non-client work

Level: Intermediate **(50 minutes)**

Speaker: Thomson Reuters

Session: A-13 (Thursday, 9:30 - 10:20 a.m.)



Getting Started With Onvio Firm Management

Have you ever purchased a program and wondered, "Am I setting this up correctly?", "What and why should I mark a certain option?" This course is designed to help you get started with Onvio Firm Management. We will focus on the setup and why you may or may not want certain features enabled based on your firm's goals. This course will be fantastic if you want to either get started with Onvio Firm Management or just review what you have set up currently. We will dive into settings ranging from Firm, Staff, and Clients to Projects and Engagements. By the completion of this course, you will be able to:

- Start setting up or reviewing your Onvio for your firm's specific needs
- Gain an understanding of set up options needed for your firm
- Discover project, and possibly engagement structure specifics to your firm's goals

Level: Basic **(100 minutes)**

Speaker: Thomson Reuters

Session: D-14 (Thursday, 3:10 - 4:50 p.m.)



Give Your Practice CS Dashboards a Tune Up

In this course, we'll share tips, tricks, and best practices to ensure you are getting the most out of your dashboards. Participants should already be familiar with using Practice CS. Upon completion, you'll be able to:

- Save layouts
- Create custom report portlets
- Discover features accessible on the dashboards, creating efficiency

Level: Intermediate **(50 minutes)**

Speaker: Thomson Reuters

Session: B-14 (Thursday, 10:50 - 11:40 a.m.)

F-14 (Friday, 11:40 a.m. - 12:30 p.m.)



Great Uses for Custom Fields in Practice CS

In this workshop, you'll see how other firms are taking advantage of the flexibility provided by the custom fields in Practice CS. We'll discuss innovative ways to track and centralize information to share with your entire firm. By taking advantage of the custom fields in Practice CS, your firm will gain efficiencies and new managing capabilities with your custom fields. Participants should be familiar with the setup of Practice CS. Upon completion, you'll be able to:

- Uncover ways other firms are using custom fields
- Centralize information to easily share with others in the office
- Identify reporting capabilities with custom fields
- Staff permissions

Level: Intermediate **(100 minutes)**

Speaker: Thomson Reuters

Session: C-12 (Thursday, 1:00 - 2:40 p.m.)

E-12 (Friday, 9:30 - 11:10 a.m.)



Identifying and Tracking Untapped Business Opportunities Within Your Practice CS Database

Focusing on specific fields within client management, we will identify and set up areas to learn how to capture and track untapped business opportunities. Upon completion, you'll be able to:

- Understand how notes can provide insights on clients to generate future revenue
- Understand how to track referrals and their impact on your business
- Use Win/Loss data to analyze prior year information to assist in future decisions regarding firm practices, pricing, and processes

Level: Intermediate **(100 minutes)**

Speaker: Thomson Reuters

Session: D-13 (Thursday, 3:10 - 4:50 p.m.)

H-13 (Friday, 3:10 - 4:50 p.m.)



Integrated Solutions Concept: Mapping and Data Sharing Best Practices

Our Products Integrate – Do you use the power of their integration? This class will teach you how to successfully manage your integrated technology, which will help focus client communication and create optimal internal workflows. Learn how to effectively setup and utilize integration points within the specific mix of our products that your firm may have. Upon completion, you'll be able to:

- Create a visual concept map for YOUR integrated solutions
- Understand Best Practices for the setup of our UT, FACS, FCS, Practice CS, ACS, WPCS, Onvio, NetClient, GoFileRoom, AdvanceFlow, FirmFlow, and GST
- Identify opportunities to capitalize on areas of integrations to create a more efficient workflow within your firm

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: A-15 (Thursday, 9:30 - 10:20 a.m.)

G-15 (Friday, 1:50 - 2:40 p.m.)



Making the Experience for Your Clients With NetClient CS

Within this course, you will learn what it takes to ensure successful implementation of NetFirm CS portal technology. Firms that have taken the first step to implement portals will benefit from learning how to successfully communicate with clients so they may understand the benefits of their secure online NetClient CS portal and know how to use it. Upon completion of this course, you'll be able to:

- Understand modules and services your clients will find useful
- Customize NetClient CS portals with the client in mind, making it easy for them to use
- Customize notifications and templates to ensure a better client experience
- Effectively market NetClient CS features to your clients
- Train clients on using their NetClient CS portals

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: C-15 (Thursday, 1:00 - 2:40 p.m.)

I-15 (Saturday, 8:30 - 10:10 a.m.)



Master Your Metrics and Save Time With Social Media Manager

Learn how to navigate specific reporting, time-saving and content tools within the Checkpoint Marketing Social Media Manager. We'll walk you through intuitive reporting options, content scheduling, queue features, and other options that are sure to boost and streamline your social media efforts and save you a ton of time in the process. Upon completion of this course, you'll be able to:

- Analyze engagement reports across multiple social media channels
- Build and automatically distribute custom reports
- Schedule content easily in advance
- Create flexible and targeted content queues to send the right content at the right time
- Use RSS feeds from your own website and/or other sources to distribute content

Level: Intermediate (50 minutes)

Speaker: Thomson Reuters

Session: F-12 (Friday, 11:40 a.m. - 12:30 p.m.)



Maximize Your Marketing With Email, Newsletters, and Social Media

Looking for ideas to enhance your firm's marketing efforts? In this insightful session, we'll explore content marketing strategies and best practices across multiple channels including email, newsletters, and social media. We'll offer tips, tricks, and techniques to facilitate a greater return on your overall efforts. You'll walk away with actionable ideas on how to:

- Grow and nurture the right audiences using email and social media
- Demonstrate thought leadership
- Target relevant content to clients, prospects, and referral sources
- Showcase your firm's practice areas and industry niches
- Use metrics to assess your results and locate business opportunities

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: B-12 (Thursday, 10:50 - 11:40 a.m.)



Maximizing Your Firm Administration Staff

The administration staff is the key to all the work at your firm starting off great, and ending on time. Administrators usually wear many hats and have many people that rely on them. Having the right reports set up and the ability to easily track what has come into the office and needs to go out is key.

- Learn what reports should be run on a weekly or monthly basis from Practice CS
- Learn how to use Manage Reports for due date tracking
- Learn about other ways that our systems can help in the many other areas that a firm administrator deals with

Level: Intermediate (50 minutes)

Speaker: Thomson Reuters

Session: A-14 (Thursday, 9:30 - 10:20 a.m.)



Mergers and Acquisitions: How to Be Successful With Them

Acquiring or merging in another firm is more common than ever, however, many mergers and acquisitions do not get finalized. This class will look at the key factors to a successful M&A:

- Talent and Technology
- Process
- Leadership and Management

Level: Advanced (50 minutes)

Speaker: Thomson Reuters

Session: B-13 (Thursday, 10:50 - 11:40 a.m.)

F-13 (Friday, 11:40 a.m. - 12:30 p.m.)



Planning Your Transition to Onvio

This course will help with understanding and planning your transition to Onvio. We will walk through the roadmap for Onvio Applications and compare the current capabilities between Onvio Firm Management and FileCabinet CS, Practice CS, and NetClient CS. This course will discuss recommendations for transitioning software within your firm. Upon completion, you will be able to:

- Get an insider's look at the Onvio roadmap/plan
- Understand whether timing is right for your firm to transition to Onvio Firm Management
- Understand items to consider before moving to Onvio Firm Management

Level: Overview (100 minutes)

Speaker: Thomson Reuters

Session: C-14 (Thursday, 1:00 - 2:40 p.m.)



Practice CS as a Proactive Management Tool

During this workshop, we'll discover practical opportunities within Practice CS to put you in front of decisions and act on them immediately. If your firm has been using Practice CS, or you've just started using it, join us as we help you identify practices for the best use of your Practice CS data in real time. Participants should be experienced in the use of Practice CS. Upon completion, you'll be able to:

- Locate real-time information, where action can be taken quickly
- Design strategic processes to utilize Practice CS data to manage clients and staff
- Create a seamless Practice CS database to access information effortlessly

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: D-15 (Thursday, 3:10 - 4:50 p.m.)
H-15 (Friday, 3:10 - 4:50 p.m.)



Project Management and Workflow Using Practice CS

Discover how to manage firm workflow easily and efficiently with the Project Management module of Practice CS. This revolutionary module will streamline workflow and allow for day-to-day tracking of client projects and tasks in one central location. Participants will be shown everything from how to set up project management to real-time usage of the application. A participant should have a working knowledge of Practice CS. Upon completion, you'll be able to:

- Create project templates
- Manage projects and tasks
- Add and edit projects
- Analyze projects through calendars, reports, and dashboards
- Update projects through various methods

Level: Advanced (100 minutes)

Speaker: Thomson Reuters

Session: C-16 (Thursday, 1:00 - 2:40 p.m.)
I-16 (Saturday, 8:30 - 10:10 a.m.)



Projects and Tasks Using Onvio Firm Management Advanced

Onvio Firm Management can help track your workflow, are you ready to learn how? Discover how Onvio Firm Management can help with tracking your projects and tasks in a central platform. You will see how to manage projects and tasks to make sure you are getting everything completed effectively and efficiently. In addition, what new enhancements and features are in Onvio to help you and your staff complete work. By the end of this course, you will be able to:

- Manage projects and tasks within Onvio Firm Management
- View and complete assigned projects and tasks
- Discover new tools and utilities within Onvio Firm Management to help with project and workflow tracking

Level: Basic (50 minutes)

Speaker: Thomson Reuters

Session: G-14 (Friday, 1:50 - 2:40 p.m.)



Retaining Top Talent

In this course, we will explore some initiatives to help increase employee engagement and retain talent. Upon completion, you'll be able to:

- Learn strategies that you can incorporate in your firm to help retain top talent
- Gain a better understanding of the potential impact retention strategies have on your bottom line
- Learn how to utilize the strategies to better "keep your finger on the pulse" of employee engagement within your firm

Level: Intermediate (50 minutes)

Speaker: Thomson Reuters

Session: G-12 (Friday, 1:50 - 2:40 p.m.)



Strategic Planning: Generating Revenue and Capacity Projections

In this course, we will take the information from Practice CS staff management, project management, and reporting and translate it to powerful data. This data will be utilized in an Excel spreadsheet, which will be provided to participants to help make strategic decisions regarding staffing and project revenue. Upon completion, you'll be able to:

- Understand how to setup and use the Practice CS modules for Capacity Planning
- Learn how to use the provided custom Practice CS report along with Setup to pull revenue projection numbers
- Be better equipped to answer the question, "Do we have enough staff; too much or too little?" and determine a course of action

Level: Advanced (100 minutes)

Speaker: Thomson Reuters

Session: E-15 (Friday, 9:30 - 11:10 a.m.)



Time and Billing Using Onvio Firm Management

In this course, you will be introduced to the time, billing, and accounts receivable capabilities within Onvio Firm Management. We will walk through how to track time using multiple methods, invoice a client in multiple ways, and receive and track accounts receivable. Upon completion of this course, you will be able to do the following:

- Gain a solid foundation on how to track time within Onvio Firm Management
- Bill clients in a fixed and non-fixed fee method
- Receive payments and adjust the clients' accounts receivable balance
- Review the reporting capabilities within Onvio Firm Management

Level: Basic (100 minutes)

Speaker: Thomson Reuters

Session: E-14 (Friday, 9:30 - 11:10 a.m.)



Utilizing Practice CS to Aid in Collections

Utilizing specific features within Client Management and Reporting we will focus on ways to better monitor and manage your firm's accounts receivable numbers and collection initiatives. Upon completion, you'll be able to:

- Stay on top of your receivables through the utilization of Firm and Client Dashboards, as well as Reports
- Use Statements to better communicate with your clients regarding outstanding accounts receivable balances
- Manage your accounts receivables using Notifications and Client Status

Level: Intermediate (50 minutes)

Speaker: Thomson Reuters

Session: F-15 (Friday, 11:40 a.m. - 12:30 p.m.)



What's New for GoFileRoom and FirmFlow

This course will cover the most recent new features and enhancements to be implemented in GoFileRoom and FirmFlow. Upon completion of this course, you will be able to:

- Identify recent enhancements and understand how they may benefit your firm
- Understand what new features and enhancements will be coming in the future

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: G-13 (Friday, 1:50 - 2:40 p.m.)



Payroll

A New Approach to Payroll Strategy

In this workshop, you will discover how a partner-sourced approach to payroll can set your firm up for payroll success and continuous growth. What if you could generate growth by offering payroll services without the hassle or risk? You can free up resources, focus on what you do best, and avoid ever-increasing payroll risks. You don't need to struggle with employment tax compliance struggles. Your clients want to work with you on all things related to their businesses, including payroll. At the end of this course, you'll be able to:

- Understand how the environment is changing and what new payroll strategies are necessary to stay competitive
- Review your firm's approach to payroll to ensure it's a profitable service
- Market payroll services and generate growth for your firm without the hassle or risk
- Better understand the tools your clients use to process payroll

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: B-9 (Thursday, 10:50 - 11:40 a.m.)



Advanced Employee Setup With Accounting CS

Despite all your efforts to standardize payroll processes — clients have special requests, present unique needs, and before long you are faced with many 1-off circumstances. Join this workshop to learn from a well-established payroll service provider that is knowledgeable in handling the most complex employer needs — and that aims to please! This workshop is for experienced users of Accounting CS Payroll looking to learn best practices to configure the system to do the heavy lifting for you. Upon completion of the workshop, you will be able to do the following employee setup topics that often generate confusion:

- Multi-state/location employees with local taxes
- Accrual benefits, independent contractors
- Year-End employee edits such as shareholder insurance, 401K distribution

Level: Advanced (50 minutes)

Speaker: Kathy Heidelmaier, Vice President, It's PayDay

Session: F-9 (Friday, 11:40 a.m. - 12:40 p.m.)



Advanced Payroll Services Using Accounting CS

This workshop will focus on the more advanced topics of providing payroll services with Accounting CS Payroll. Participants should have attended the Payroll Services using Accounting CS workshop or have equivalent knowledge. Upon completion, you'll be able to:

- Set up a client for direct deposit and impounding
- Verify payroll totals accurately
- Process W-2, 1099, 94x, and other tax compliance forms
- Setup billing items and process invoices
- Increase efficiency when processing payroll forms

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: E-10 (Friday, 9:30 - 11:10 a.m.)



Advanced Tips for Complex Payroll Delivery Using Accounting CS

This workshop, intended for experienced Accounting CS Payroll users, explores more complex payroll setup, features, and functionality. It takes a comprehensive look at providing payroll services. Participants should be familiar with the commonly used features in Accounting CS Payroll, including payroll setup, time entry, printing, and payroll tax compliance. We'll cover a wide range of tips and tricks relevant to delivering payroll services more efficiently and show you how to configure the software to do the heavy lifting for you. Upon completion of the workshop, you will be able to:

- Have a better understanding of payroll workflow design
- Use task-based and batch processing approaches to reviewing and processing payroll tax forms
- Understand how to deploy Client Access to deliver on-demand employee setup, time entry, and reporting to complex clients

Level: Advanced (100 minutes)

Speaker: Thomson Reuters

Session: I-10 (Saturday, 8:30 - 10:10 a.m.)



Designing Payroll Reports and Layouts Using Accounting CS Payroll

This hands-on workshop will focus on customizing standard payroll reports and check layouts to meet common client requests. Upon completion, you'll be able to:

- Use filter and sort options when printing reports and building report profiles to customize report output
- Locate and import shared reports and layouts
- Modify check layouts
- Update standard reports using the report designer
- Share customized reports and layouts with other firms

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: H-4 (Friday, 3:10 - 4:50 p.m.)

I-4 (Saturday, 8:30 - 10:10 a.m.)



Health Care Reform: What's Changed and Changing Under the Affordable Care Act

In this workshop, we will discuss health care reform, originally implemented by the Affordable Care Act (ACA). Some ACA provisions continue unchanged, while post-ACA laws and regulations have modified some key requirements. We'll review some of the continuing obligations for employer-sponsored health plans (including employer shared responsibility) and highlight recent and upcoming changes, with a focus on tax and reporting issues. Upon completion of this workshop, you will be able to:

- Better understand the status of various tax and reporting provisions affecting your clients' health plans under the ACA
- Anticipate upcoming changes affecting employer-sponsored health plans

Level: Intermediate (50 minutes)

Speaker: Thomson Reuters

Session: A-10 (Thursday, 9:30 - 10:20 a.m.)



Key Compliance Issues for Account-Based Health Plans

Employers looking for ways to control healthcare costs are increasingly turning to account-based plans. While many tax professionals are familiar with health FSAs, they may be less conversant with other account-based solutions. Health savings accounts (HSAs) provide a triple tax advantage—deductible contributions, tax-free investment returns, and tax-free withdrawals for qualified expenses. But a complex set of rules must be followed to avoid adverse tax consequences. Meanwhile, efforts are underway to enhance health reimbursement arrangements (HRAs), including reimbursement of individual medical premiums, to adapt them to the ACA's compliance regime. This session will review the key compliance considerations for HSAs and HRAs and explain how they may fit into an employer's benefits program. Upon completion of this workshop, you will be able to:

- Identify key aspects and legal requirements of account-based health plans
- Understand how account-based plans can fit into an employer-sponsored benefit program

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: F-10 (Friday, 11:40 a.m. - 12:30 p.m.)



Payroll Batch Processing: Complete Payroll Output, Tax Forms, e-Filing, and Liability Payments

In this workshop, you will hear from a Senior Tax Specialist from myPay Solutions about how to use batch processing to streamline your payroll businesses, from paychecks and reports to tax liability payments and filings, with a focus on leveraging capabilities in Accounting CS to maximize efficiencies and minimize errors. Having over 10,000 payroll clients, myPay Solutions is a payroll service bureau that primarily services accountants, providing an efficient way to provide your clients with payroll services. This workshop is intended for experienced Accounting CS Payroll users who are looking to streamline their tax payment and filing payment processes. This course overlaps with "Ramping up your Payroll with Accounting CS" but goes into tighter focus on the processes and procedures within Accounting CS. Upon completion of this workshop, you will be able to:

- Setup and leverage Complete Payroll Output to streamline processing of payrolls
- Standardize procedures for reports, reporting, and checks
- Execute Best Practices for timely payment of liabilities and establishing bank relationships
- Leverage Accounting CS to maximize efficiencies in Bulk Filing of Tax Returns

Level: Advanced (100 minutes)

Speaker: Thomson Reuters

Session: H-10 (Friday, 3:10 - 4:50 p.m.)



Payroll Compliance: 2019 and 2020 Legislation Update

In this workshop, we will discuss several things you need to know to prepare for year-end processing, as well as the latest in federal and state payroll changes and proposals for 2020. If you offer payroll services, you won't want to miss this session. Upon completion of this workshop, you will be able to:

- Understand latest TCJA tax reform items that affect payroll and ACA/AHA requirements for employers 2020 W-4, a brand-new way of tax withholding calculations New Exempt/Non-Exempt rules
- Discuss topics related to accelerated federal and state W-2s, new SSA initiatives, payroll reconciliation, I-9 regulations, new hire reporting, escheat rules, unemployment with respect to deficit states, state sick pay, fringe benefits, and more
- Utilize tips to make year-end processing more efficient, effective, and compliant

Level: Overview (100 minutes)

Speaker: Thomson Reuters

Session: D-9 (Thursday, 3:10 - 4:50 p.m.)

H-9 (Friday, 3:10 - 4:50 p.m.)



Payroll Services Using Accounting CS

This hands-on workshop will focus on the payroll capabilities of Accounting CS Payroll. You'll be provided with a solid foundation, leaving you feeling confident in your ability to provide payroll services with Accounting CS Payroll. Upon completion, you'll be able to:

- Navigate payroll-specific setup
- Update the Accounting CS database with new client and employee data
- Perform payroll check entry
- Review the payroll tax return process
- Use best practices to make payrolls more accurate

Level: Basic (200 minutes)

Speaker: Thomson Reuters

Session: Part 1: C-4 (Thursday, 1:00 - 2:40 p.m.)

Part 2: D-4 (Thursday, 3:10 - 4:50 p.m.)



Prepping for Payroll Year-End Using Accounting CS

This workshop will cover numerous timesaving features in Accounting CS Payroll that will speed year-end processing. Specifically, we will demonstrate proper processes for producing W-2s and 1099s, methods for quickly populating tax forms, and procedures for e-filing payroll tax returns. Prior to taking this workshop, participants should have a working knowledge of Accounting CS Payroll. Upon completion of the workshop, you will be able to:

- Process W-2, 1099 and 1095 forms more efficiently, using e-filing for SSA and IRS copies
- Process 94x forms more efficiently by e-filing as well as batch printing of the 94x forms

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: D-10 (Thursday, 3:10 - 4:50 p.m.)

I-9 (Saturday, 8:30 - 10:10 a.m.)



Proven Marketing and Sales Strategies to Grow Payroll Services

Payroll services continue to establish as a top opportunity for accounting firms. Let's review the foundational components to advancing payroll service, and then focus our attention to growth through proven marketing and sales strategies. After identifying effective lead flow methods and lead management systems, we will dive into effective sales methods to build a great payroll service division. Upon completion, you'll be able to:

- Determine if your foundation is ready for payroll services
- Learn how to do active marketing – finding clients
- Understand passive marketing – how clients find you
- See how to align auxiliary service resources that boost sales
- Define an effective sales system that supports growth

Level: Overview (100 minutes)

Speaker: Sean Manning, CEO – Founder, Payroll Vault

Session: E-9 (Friday, 9:30 - 11:10 a.m.)



Ramping Up Your Payroll With Accounting CS

In this workshop, you will learn about processes within Accounting CS Payroll and your firm that allow you to streamline onboarding and processing payroll for your clients. We will discuss ways to increase accuracy of client and employee setup, decrease processing time per client, and increase the accuracy and timeliness of payments and tax filings. You will hear from a Senior Tax Specialist from myPay Solutions. Having over 10,000 payroll clients, myPay Solutions is a payroll service bureau that primarily services accountants, providing an efficient way to provide your clients with payroll services. This workshop is intended for Accounting CS Payroll users who are familiar with the basics of setup and processing payroll, and are looking to expand and grow their payroll businesses. Upon completion of this workshop, you will be able to:

- Establish Best Practices for onboarding new clients to your practice
- Develop procedures for Payroll Compliance and communicate changes to Payroll Tax Law
- Setup and utilize automation for portions of the payroll processing, streamlining and increasing efficiency
- Practice Batch Processes in Processing Tax Returns and Payments, increasing accuracy and timeliness of filings

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: C-9 (Thursday, 1:00 - 2:40 p.m.)



Streamlining Your Payroll Operations With Accounting CS

Offering payroll services can provide an additional revenue stream and accounting firms are positioned better than anyone to take advantage! This workshop will cover tips and tricks relevant to delivering payroll services to your clients more efficiently and how to streamline your operations by defining a clear onboarding process, implementing a paperless payroll model, and more. This workshop is intended for participants with a working knowledge of Accounting CS Payroll and takes a comprehensive look at offering payroll services. Upon completion of this workshop, you'll be able to:

- Leverage full potential of Accounting CS Payroll
- Develop an onboarding process for new payroll clients
- Establish a paperless payroll delivery model
- Identify partnerships to compliment your payroll offerings

Level: Intermediate (50 minutes)

Speaker: Christopher Fleming, EA - CEO, Fleming Advisors, LLC

Session: A-9 (Thursday, 9:30 - 10:20 a.m.)
G-10 (Friday, 1:50 - 2:40 p.m.)



SwipeClock Integration With Accounting CS Payroll

If you offer payroll services, you understand the importance of highly efficient payroll processing. Accounting CS integrates with SwipeClock's cloud-based time and attendance solutions, which can help to simplify time tracking and helps you to provide a better payroll service. This workshop takes you through the process of starting service with SwipeClock and setting up your client and employee records for SwipeClock import. Upon completion of the workshop, you will be able to:

- Complete steps to integrate Accounting CS Payroll
- Better understand integration overview
- Process payroll checks for SwipeClock clients
- Understand the New! WorkforceHUB

Level: Intermediate (50 minutes)

Speaker: Kathy Heidelmaier, Vice President, It's PayDay

Session: G-9 (Friday, 1:50 - 2:40 p.m.)



Tax Compliance Processing Using Accounting CS Payroll

This lecture-style workshop will focus on the after-the-fact payroll capabilities of Accounting CS Payroll. You will be provided with a solid foundation that will leave you confident in your ability to provide tax compliance payroll services with Accounting CS. Upon completion, you'll be able to:

- Update the Accounting CS database with new client and employee data
- Record earnings in a variety of ways, including importing from a spreadsheet
- Edit, review, and process payroll tax returns
- Get started with the electronic payroll tax forms process
- Use batch processing methods to maximize your processing efficiencies

Level: Basic (100 minutes)

Speaker: Thomson Reuters

Session: C-10 (Thursday, 1:00 - 2:40 p.m.)



Treacherous C's: Form 1094/1095 Navigational Aids for ALEs

Applicable large employers (ALEs) face a daunting task in the annual filing of Form 1094/1095-C to report offers of coverage under the ACA's employer shared responsibility provisions. In this session, we'll focus on the parts of the form that are most critical to penalty assessment. We'll review the rules for offers of coverage, minimum value, affordability, and penalty exceptions (e.g., waiting periods). We'll also provide some lifelines for ALEs finding themselves on the rocky shoals of penalty assessment. Upon completion of this workshop, you will be able to:

- Understand ACA reporting requirements for applicable large employers
- Identify information needed to accurately complete the forms
- Identify key lines on the reporting forms and challenges related to completion
- Develop strategies for responding to IRS penalty assessments

Level: Intermediate **(50 minutes)**

Speaker: Thomson Reuters

Session: B-10 (Thursday, 10:50 - 11:40 a.m.)



Security

Cloud Security

Recently, we've seen a shift in perspectives regarding "the Cloud" - from concerns about it being safe to an assumption that the Cloud negates customers' responsibilities. The truth is, while the Cloud services can often be more secure than local deployments, going to the Cloud doesn't mean you can rest regarding your firm's security. Attending this workshop will help you:

- Identify common misconceptions regarding the Cloud security
- Guide your firm through effectively and safely taking advantage of the power of the Cloud computing to grow your business

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: A-25 (Thursday, 9:30 - 10:20 a.m.)
F-25 (Friday, 11:40 a.m. - 12:30 p.m.)



Cyber Security Review of 2019

Cybersecurity can be an overwhelming topic, yet with all the recent news surrounding cybersecurity concerns, it's not a topic to be ignored. Join software and content experts from Thomson Reuters in this workshop to learn about:

- What's trending with software security
- What's trending globally and at federal and state levels with safeguarding client data
- Industry trends and how cybercriminals are becoming more sophisticated in their attacks against tax professionals

Level: Overview (100 minutes)

Speaker: Thomson Reuters

Session: C-25 (Thursday, 1:00 - 2:40 p.m.)



Data Breach Preparation and Response 101

In this workshop, you will learn about the threats posed from cyber-attacks and data breaches, as well as how a business can take steps to mitigate their cyber risks. Upon completion, you'll be able to:

- Understand the cyber threat landscape and what data the bad guys are attempting to access
- Determine numerous ways that your business can prepare for data breaches
- Identify the resources needed to assemble a world-class data breach response and crisis team

Level: Basic (50 minutes)

Speaker: Keith Tagliaferri, Cyber Claims Strategy Lead, The Hartford

Session: F-24 (Friday, 11:40 a.m. - 12:30 p.m.)



Data Security: Assessing the Risks in Your Office

The Federal Trade Commission (FTC) Safeguards Rule, along with various states, requires tax professionals that maintain, share, transmit, or store taxpayer data to have safeguards in place to protect taxpayer information and develop a written information security plan that describes their program to protect that information. The first step in developing an information security plan is to perform a risk assessment. In this workshop, you will:

- Understand your legal requirements to safeguard taxpayer data
- Identify the components of a written information security plan
- Identify and assess security risks to taxpayer information in each relevant area of your business operations
- Practice how to address risks with development of policies and procedures

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: D-25 (Thursday, 3:10 - 4:50 p.m.)
I-25 (Saturday, 8:30 - 10:10 a.m.)



How Cybersecurity Can Be a Marketing Asset

When we think of security, we tend to think negatively - all the ways things can go wrong. But when can cybersecurity be a positive thing? Join us in this workshop as we discuss:

- What your staff (current and not-yet-hired!) think about security
- What your clients (and prospects!) think about security
- What you can do to promote security with staff and clients
- How you can use your keen awareness of cybersecurity as a marketing asset

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: B-25 (Thursday, 10:50 - 11:40 a.m.)



Protecting Your Firm and Clients From Security Threats

All the recent talk about security can be overwhelming, especially with security experts saying that firms should prepare for when — not if — they experience a data breach. While there's no guarantee of safety in any part of our lives, there are steps we can take to bolster our safety. Just as seat belts are now mandatory to protect us in our cars, the accounting profession has implemented mandatory security measures to keep your data safe, and we want to help you take even more realistic steps to help protect yourself and your clients. Join us in this workshop to learn:

- How cybercriminals are attacking the profession
- Steps firms are mandated to take
- Additional steps you can take to help further secure your firm

Level: Overview (100 minutes)

Speaker: Thomson Reuters

Session: H-25 (Friday, 3:10 - 4:50 p.m.)



Security Essentials for Accounting Firms

Security is consistently listed as one of the AICPA's Top Technology concerns, but few accounting firms take it seriously until they have been impacted by a breach. Roman will walk through the necessary components of accounting firm's security including the latest information breach statistics and the specifics of how to minimize your firm's greatest exposure: YOUR PERSONNEL. He will also provide participants with the necessary resources to review their IT Policy/ Governance infrastructure and to conduct their own firm security training.

Level: Basic **(50 minutes)**

Speaker: Roman Kepczyk, CPA.CITP, CGMA
Director of Firm Technology Strategy, Right Networks

Session: G-25 (Friday, 1:50 - 2:40 p.m.)



Security Features Within the Tax and Payroll Applications

Securing your firm isn't a one-time thing, nor can any-one tool guarantee safety. The real question is: "Are you using the tools you already have to help secure your firm?" In this workshop, you will learn about:

- Features you can use within UltraTax CS to help protect your firm
- Features you can use within Accounting CS Payroll to help protect your firm
- How to integrate these features into your tax and payroll workflow

Level: Intermediate **(100 minutes)**

Speaker: Thomson Reuters

Session: E-25 (Friday, 9:30 - 11:10 a.m.)



Tax & Asset Management

10 Years of UltraTax CS Enhancements: Are You Using Them?

Have you ever learned something new in UltraTax CS and said to yourself, “Hmm...I wonder how long that’s been in the software?” If so, you’re not alone. UltraTax CS is such a powerful, feature-packed program that whether you’re a new user or a seasoned veteran, you might not be aware of some of the best features and capabilities the software has to offer. So, join us in this workshop and discover them for yourself! We’ll explore some of the most impactful enhancements to UltraTax CS over the last 10 years — especially those that have proven to be client favorites — and uncover many more historic, yet highly efficient, features of UltraTax CS you didn’t know existed. Participants should have a working knowledge of UltraTax CS. Upon completion, you’ll be able to implement the learned enhancements into your use of UltraTax CS.

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: D-22 (Thursday, 3:10 - 4:50 p.m.)
H-22 (Friday, 3:10 - 4:50 p.m.)



Advance Your Keyword Search Skills and Techniques on Checkpoint

Ready to take a deeper dive into performing effective keyword searches in Checkpoint? Ready to learn some tips on narrowing down the number of hits you get? If the answer to those questions is yes, this class is for you! Learn tips on how to narrow your search results, explore the features that are unique to Intuitive Search and Terms & Connectors, and why you might choose one over the other.

Level: Intermediate (50 minutes)

Speaker: Thomson Reuters

Session: A-20 (Thursday, 9:30 - 10:20 a.m.)



Advance Your Keyword Search Skills and Techniques on Checkpoint

See it, do it, and learn it! This hands-on course takes a deep dive into performing effective keyword searches in Checkpoint. Learn tips on how to narrow your search results, explore the features that are unique to Intuitive Search and Terms & Connectors, and why you might choose one over the other.

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: E-3 (Friday, 9:30 - 11:10 a.m.)



Advanced 1040 Return Preparation Using UltraTax CS

This advanced workshop will show you how to get the most out of the UltraTax/1040 software. Prerequisites include a working knowledge of UltraTax/1040 and/or successful completion of UltraTax/1040 Essentials 1. Upon completion, you’ll be able to:

- Data share demographic and financial information from Schedule K-1 data
- Enter tax return information for SE health insurance deduction

from K-1s, state allocations, single member LLC returns, supplemental business expenses and vacation/rental home activities, and calculating foreign earned income exclusion

- Enter education expenses, QTP distribution, and complete FAFSA
- Report Minister wages and enter housing allowance
- Use the Filing Status Optimization Tool and prepare estimated tax payments
- Amend a tax return

Level: Advanced (100 minutes)

Speaker: Thomson Reuters

Session: E-19 (Friday, 9:30 - 11:10 a.m.)
I-19 (Saturday, 8:30 - 10:10 a.m.)



Advising Clients Who Can’t Pay Their Taxes

In this workshop, you’ll learn ways to proactively help clients who can’t pay their taxes. Upon completion, you’ll be able to:

- Help clients apply for a short-term online payment agreement
- Request an installment agreement
- File an offer in compromise
- Ask the IRS to delay collection
- Identify other options

Level: Basic (50 minutes)

Speaker: Thomson Reuters

Session: A-23 (Thursday, 9:30 - 10:20 a.m.)
B-23 (Thursday, 10:50 - 11:40 a.m.)



Are You Taking Advantage of All the Features of Fixed Assets CS?

Have you ever talked to someone about Fixed Assets CS and said, “I didn’t know Fixed Assets CS could even do something like that” or “I never thought to use Fixed Assets CS for something like that”? During this class, we are going to look at using Fixed Assets CS for more than just entering an asset or disposing of an asset. You will walk away from this class seeing how to use Fixed Assets CS in other ways and learn what features Fixed Assets CS has to offer you and your firm. A working knowledge of Fixed Assets CS is preferred. By the end of this class, you will be able to:

- Discover unused features of Fixed Assets CS and implement them during your next tax year

Level: Intermediate (50 minutes)

Speaker: Thomson Reuters

Session: G-22 (Friday, 1:50 - 2:40 p.m.)



Business Tax Update

Heading into our second tax season under the 2017 Tax Cuts and Jobs Act the IRS continues to fill in the gaps in the law with Proposed and Final Regulations, Rev. Procs, Notices, and FAQs, sometimes with major surprises (good or bad). Whether you are interested in C or S corporations, Partnerships or Sch. C proprietors, this session should interest you! In this lively workshop, Doug will cover any

new tax legislation passed by Congress in 2019, recent IRS TCJA interpretations and guidance, important tax court opinions, and some year-end tax planning ideas. Note: By popular request, this workshop will be offered twice.

Level: Overview (100 minutes)

Speaker: Douglas Van Der Aa, Van Der Aa Tax Ed, LLC

Session: D-17 (Thursday, 3:10 - 4:50 p.m.)

L-17 (Friday, 3:10 - 4:50 p.m.)



Communicate Results With Planner CS

Planner CS is an invaluable tool for tax professionals who build individual tax plans for their clients — both because it stays current with new legislation in ways that homemade Excel spreadsheets and other solutions don't. Also, it produces impressive deliverables that can provide your clients with a written tax plan. In this workshop, you will learn best practices for creating those deliverables. Participants should have a working knowledge of building plans in Planner CS. Upon completion, you will be able to:

- Design personalized client letters to summarize and reinforce important planning points
- Create customized reports and report sets so you can efficiently produce client deliverables
- Add graphs to help clients visualize the plan you have created

Level: Intermediate (100 minutes)

Speaker: Cindy Bupp, EA – Tax Department Manager, Huth Thompson LLP

Session: H-16 (Friday, 3:10 - 4:50 p.m.)



Customizing Your Client Documents Within UltraTax CS

During this workshop, we will help you customize your client documents. This class will range from just entering in a paragraph to entering in print-if statements. If you customize your firm's documents, or want to, do not miss out on this hands-on course. Participants should have a working knowledge of UltraTax CS. Upon completion, you'll be able to:

- Use variables and print-if statements to customize transmittal letters, filing instructions, invoices, election statements, slip sheets, and mailing labels
- Customize client documents using input screen fields

Level: Intermediate (200 minutes)

Speaker: Thomson Reuters

Session: Part 1: C-3 (Thursday, 1:00 - 2:40 p.m.)

Part 2: D-3 (Thursday, 3:10 - 4:50 p.m.)



Data Mine in UltraTax CS to Identify Advisory Opportunities

Looking for those advisory opportunities can be hard in a tax database. However, there is a solution for you! Data Mining is a versatile feature that lets you query your firm's UltraTax CS databases for specific data and client characteristics. This underused productivity tool can make a significant difference in moving your firm toward more proactive tax planning guidance for clients. Participants

should have a working knowledge of UltraTax CS. Upon completion, you'll be able to run data mining reports to:

- Identify each client's tax accounting needs
- Pinpoint tax saving opportunities for each client
- Prepare announcements
- Send reminder letters
- Send other client-specific communications

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: H-5 (Friday, 3:10 - 4:50 p.m.)

I-5 (Saturday, 8:30 - 10:10 a.m.)



E-Filing Within UltraTax CS

This workshop will walk you through the process of using UltraTax CS to e-file individual, corporate, and partnership returns. Participants should have applied for an EFIN with the IRS, registered the EFIN with Thomson Reuters, and have a basic understanding of UltraTax CS. Upon completion, you'll be able to:

- Set up UltraTax CS for electronic filing
- Select a PIN signature method
- Enter data to file 1040, 1120, and 1065 returns electronically
- Attach a PDF file to a return's electronic file
- Sign documents with eSignature
- Check returns for e-file errors
- Create and transmit electronic files, and retrieve acknowledgements
- View the status of electronic files
- Email notifications for accepted returns to clients

Level: Basic (100 minutes)

Speaker: Thomson Reuters

Session: I-17 (Saturday, 8:30 - 10:10 a.m.)



Fixed Assets CS Essentials

Fixed Assets CS is the perfect companion system to UltraTax CS. It will save you an enormous amount of time in the tax preparation and review process — if you know how to take advantage of its power. Participants should have a working knowledge of Fixed Assets CS. Upon completion, you'll be able to:

- Enter and dispose assets
- Use the Reassign Assets utility
- Import client asset information from an Excel spreadsheet
- Create custom reports
- View Fixed Assets CS reports in UltraTax CS
- Set up client template options and apply them to existing clients

Level: Basic (150 minutes)

Speaker: Thomson Reuters

Session: Part 1: G-3 (Friday, 1:50 - 2:40 p.m.)

Part 2: H-3 (Friday, 3:10 - 4:50 p.m.)



Getting Ready for Busy Season Using UltraTax CS

Getting ready for another busy season can be a project. In this class, we are going to look at items you need to think about doing for busy season and how to get UltraTax CS ready. We will explore items such as organizers, proforma, and global setup. After this class, you will have a checklist of items to start working on before the next tax season rolls around. By the completion of this class, you will be able to:

- Develop a preseason checklist of items to complete
- Proforma clients, documents, and settings to the next year of UltraTax CS
- Review organizer settings and options within the new year of UltraTax CS
- Review any document settings for the upcoming tax year

Level: Basic (100 minutes)

Speaker: Thomson Reuters

Session: C-21 (Thursday, 1:00 - 2:40 p.m.)



Getting Ready to Move From UltraTax CS to Onvio

In this class, you will start to understand what the transition process will look like moving to the Onvio platform from UltraTax CS and other CS Professional Suite products. We will discuss how to think about moving to Onvio and what items your firm should consider beforehand.

We will look at a roadmap for the Onvio platform, and understand key best practices for a firm evaluating, planning, and preparing for a transition of technology. By the end of this course, you will be able to:

- Develop an "Item to Consider" list before moving to Onvio
- Gain an understanding of the transition process to Onvio and the difference between an integrated suite of products and a platform ecosystem
- Discover the new tools and capabilities available within Onvio to optimize your tax workflow

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: B-16 (Thursday, 10:50 - 11:40 a.m.)



GoSystem Tax RS Tips and Tricks

Join us to learn time saving throughout your tax workflow with these tips and tricks within the GoSystem Tax RS program. Upon completion, you will be able to:

- Optimize data entry with the new Organizer
- Automate using Tax Defaults
- Leverage the power of the letters and filing instruction module, and more!

Level: Basic (100 minutes)

Speaker: Thomson Reuters

Session: H-18 (Friday, 3:10 - 4:50 p.m.)



Incorporating eSignatures Into Your UltraTax CS Workflow

In this session, we will begin to discover the advantages of using eSignatures during your day-to-day tax workflow, including saving time and energy. Participants should have knowledge of UltraTax CS navigation. Upon completing this course, you will be able to:

- Understand eSignatures process
- Process engagement letters and 8879s through eSignatures
- View and check the status of signed documents

Level: Intermediate (50 minutes)

Speaker: Thomson Reuters

Session: A-18 (Thursday, 9:30 - 10:20 a.m.)



Individual Tax Update

Heading into our second tax season under the 2017 Tax Cuts and Jobs Act the IRS continues to fill in the gaps in the law with Proposed and Final Regulations, Rev. Procs, Notices and FAQs. As the "postcard" 1040 continues to evolve, we will highlight the changes in the forms to help you get ready for the upcoming busy season. In this lively workshop, Doug will cover any new tax legislation passed by Congress in 2019, the most recent IRS TCJA interpretations and guidance, updated forms, recent court opinions, and even try to give you some year-end tax planning ideas to use before 12/31. Note: By popular request, this workshop will be offered twice.

Level: Overview (100 minutes)

Speaker: Douglas Van Der Aa, Van Der Aa Tax Ed, LLC

Session: C-17 (Thursday, 1:00 - 2:40 p.m.)

E-17 (Friday, 9:30 - 11:10 a.m.)



Is My Client's Business a Tax Shelter?

In this workshop, you'll see why the IRS labels seemingly harmless business arrangements as tax shelters. We'll discuss the various definitions of a tax shelter and examine why they matter after the Tax Cuts and Jobs Act. Upon completion, you'll be able to:

- Determine if your client is a tax shelter
- Identify the consequences of tax shelter status
- Implement ways to avoid tax shelter classification

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: D-20 (Thursday, 3:10 - 4:50 p.m.)

H-20 (Friday, 3:10 - 4:50 p.m.)



Making Processing Easy: Updating Your UltraTax CS Print Collations

How many times have you worked on print collations to get it just right? Have you ever thought about making UltraTax print out action items? In this class, we will explore how to adjust your print collations and utilize the Action Items. In addition, how to proforma print collations to save you time during your pre-tax season checklists. Lastly, how you can retain client and preparer copies in your document management program. By the end of this course, you will be able to:

- Develop a preseason checklist and schedule for updating print collations
- Utilize print collations for action items
- Utilize print collations to effectively deliver and retain tax return information

Level: Basic (50 minutes)

Speaker: Thomson Reuters

Session: A-17 (Thursday, 9:30 - 10:20 a.m.)

G-17 (Friday, 1:50 - 2:40 p.m.)



Mastering Partner Information Data Entry Within UltraTax CS

During this class, we will look at the famous Partner Information icon. There are a LOT of items in that dialog and we will explore how to do the different functions within it, such as Change of Ownerships and Transfer of Capital. After this class, you will be able to:

- Navigate and use the Partner Information dialog effectively and efficiently!
- Correctly and efficiently do a Change of Ownership and Transfer of Capital
- Allocate specific amounts to specific partners
- Add, edit, review, and delete information within the partner information screen
- View reports based on your information within the partner information dialog

Level: Basic (50 minutes)

Speaker: Thomson Reuters

Session: A-19 (Thursday, 9:30 - 10:20 a.m.)

F-19 (Friday, 11:40 a.m. - 12:30 p.m.)



Must-See State and Local Tax Features on Checkpoint

Join us to learn functionality tips, tricks, and shortcuts to save time on your State and Local Tax Research. Topics will include examples related to the Tax Cuts and Jobs Act, including charts that summarize how states address various TCJA laws.

Level: Basic (50 minutes)

Speaker: Thomson Reuters

Session: B-20 (Thursday, 10:50 - 11:40 a.m.)



Navigating the Complexities of QBI and 199A With UltraTax CS

Navigating the complexities behind 199A can be difficult. During this course, we will explore how to remove some of that difficulty when preparing tax returns with UltraTax CS and Checkpoint. We will go through how to utilize checkpoint to find information about 199A and UltraTax CS to prepare the return. You will walk away with an understanding of what resources are in UltraTax CS for 199A and how to enter information around it. In addition, how to utilize Checkpoint when you need to research a topic or question during the preparation phase. A working knowledge of UltraTax CS is preferred. By the end of this course, you will be able to:

- Enter 199A information into UltraTax CS
- Utilize the integration between UltraTax CS and Checkpoint to locate important information
- Discover worksheets and resources available to help in preparing a return with 199A

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: C-19 (Thursday, 1:00 - 2:40 p.m.)

H-19 (Friday, 3:10 - 4:50 p.m.)



Onvio Tax and Onvio Fixed Assets

We've heard so much about Onvio, let's dive into what Onvio Tax and Onvio Fixed Assets will look like. During this class, you will get a preview of what navigating and entering data into Onvio Tax will be like. In addition, we will explore how Onvio Fixed Assets will integrate while completing a tax return. One of the final items in this class will be what additional tools Onvio Tax and Onvio Fixed Assets will have to enhance your firm's Tax Workflow. By the end of this course, you will be able to:

- Get a preview of navigating Onvio Tax and Onvio Fixed Assets
- See how the integration will work between Onvio Tax and Onvio Fixed Assets
- Understand new features within Onvio Tax and Onvio Fixed Assets to help with your tax workflow

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: F-16 (Friday, 11:40 a.m. - 12:30 p.m.)



Planner CS Essentials

Have you thought about getting more into Advisory Services? Have you ever wondered is there more than just the Tax Projection Worksheets in UltraTax CS to help with Planning? In this class, you will start to see how to utilize Planner CS with different planning scenarios. You'll learn how to export any existing tax returns from UltraTax CS to Planner CS to save time. In addition, how to produce deliverables to your client(s) so they can see the options laid out in front of them. Upon completion, you will be able to:

- Set up preparer and plan preferences
- Import client data from UltraTax CS
- Navigate the Planner CS input screens
- Enter plan data and take advantage of the auto copy and auto increase capabilities
- Create custom reports, graphs, and letters
- Use additional utilities within Planner CS

Level: Basic (100 minutes)

Speaker: Thomson Reuters

Session: E-16 (Friday, 9:30 - 11:10 a.m.)



Powerful Tax Financial Tools Using Toolbox CS

How handy is a toolbox? Have you ever wondered what handy tools are in the CS Professional Suite's version of a toolbox? In this course, you will learn how to enjoy tax and accounting calculators, forms, and other tools available within ToolBox CS. Though designed for use any time of the year, ToolBox CS can be especially helpful during tax season. Upon completion, you'll be able to:

- Use tax calculators
- Provide clarity to your clients on advanced tax topics using built-in IRS flowcharts
- Gain quick access to key IRS forms
- Create templates for common internal office documents

Level: Basic (50 minutes)

Speaker: Thomson Reuters

Session: G-16 (Friday, 1:50 - 2:40 p.m.)



Preparing 1041, 706, and 709 Returns Using UltraTax CS

In this session, we'll walk through the data entry for gift tax, estate tax, and fiduciary returns in UltraTax CS. Participants should have a working knowledge of UltraTax CS navigation. Upon completion, you'll be able to:

- Enter 1041 information for the tax return, including general and beneficiary information, income and deductions, allocations, charitable trusts, e-filing, and extensions
- Enter 706 information for the tax return, including assets and deductions, asset and deduction allocations, allocation to beneficiaries, and extensions
- Enter 709 information for the tax return, including general information, donee and gift information, gift splitting, and extensions

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: I-18 (Saturday, 8:30 - 10:10 a.m.)



Preparing 1065, 1120, and 1040 Returns Using UltraTax CS

Have you ever thought, "Where do I start learning a new program" or "I need to get done with these returns that pass-through each other, but how do I start in UltraTax CS?" During this class, we will take all the essential information you need to know to get a return started. You will work through preparing the business return and having it share to the individual return. From there, you will enter the information in the individual return to finish the return. By the completion of this course, you will be able to:

- Navigate the UltraTax CS input screens
- Enter Income and Deduction information on multiple types of returns
- Enter schedule L, M-1, and M-2 information on business returns
- Enter activity information; including K-1's, Rentals, and Schedule C's
- Utilize Review Tools and Delivery options including research tools, diagnostics, and printing returns

Level: Basic (200 minutes)

Speaker: Thomson Reuters

Session: Part 1: C-2 (Thursday, 1:00 - 2:40 p.m.)

Part 2: D-2 (Thursday, 3:10 - 4:50 p.m.)



Preparing 990 and 5500 Returns Using UltraTax CS

This workshop will walk you through the data entry for exempt organization and benefit plan returns in UltraTax CS. Participants should have a working knowledge of UltraTax CS navigation. Upon completion, you'll be able to:

- Enter 990 information for the tax return, including general, income and expense information, Schedules A, B, and C, office information, balance sheet information
- Enter 5500 information for the tax return, including general and income information, Schedules SB, D, and R, and e-filing

Level: Intermediate (50 minutes)

Speaker: Thomson Reuters

Session: B-19 (Thursday, 10:50 - 11:40 a.m.)



Preparing Personal Property Tax Returns in Fixed Assets CS and UltraTax CS

In this course, we will explore how to enter personal (tangible) property tax "PPT" returns within UltraTax CS and Fixed Assets CS. When going through this course, we will activate association fields in order to automatically create the PPT return. In addition, we will design reports within Fixed Assets CS to help in the preparation and supplement the return. Participants should have a working knowledge of UltraTax CS and Fixed Assets CS and/or successful completion of Fixed Assets CS Essentials. By the end of class, you will be able to do the following items:

- Activate asset associations tailored to PPT returns
- Reassign existing assets
- Design reports within Fixed Assets CS in order to supplement the PPT return

Level: Advanced (50 minutes)

Speaker: Thomson Reuters

Session: B-17 (Thursday, 10:50 - 11:40 a.m.)



Processing Clients With Foreign Activities Using UltraTax CS

In this session, you will learn how UltraTax CS is well positioned to assist you in an increasingly global economy. Even if none of your existing clients participate in foreign activities, preparing yourself on these tax topics now will put you in a position to take on new engagements in the likely event that a prospective client with foreign activities walks into your office looking for help. Participants should have a working knowledge of UltraTax CS. Upon completion, you'll be able to:

- Enter foreign source income
- Calculate Dual Status return
- Foreign Bank Account Report (FBAR)
- Foreign earned income exclusion
- Preparing Form 1040NR

Level: Advanced (100 minutes)

Speaker: Thomson Reuters

Session: D-21 (Thursday, 3:10 - 4:50 p.m.)



Processing Inventory With Fixed Assets CS

During this course, we will explore how to process inventory in Fixed Assets CS. In this module, you will be able to conduct an inventory in order to determine the status of assets. Along the way, we will create asset labels, conduct inventories, and create reports. When conducting an inventory, we will do manual and bar code scanning methods. Participants should have a working knowledge of Fixed Assets CS and/or successful completion of Fixed Assets CS Essentials. By the end of this class, you will be able to:

- Create and design asset labels
- Conduct inventory using a manual and bar code method
- Print reports in order to reconcile or modify asset status

Level: Advanced (50 minutes)

Speaker: Thomson Reuters

Session: F-17 (Friday, 11:40 a.m. - 12:30 p.m.)



Processing Multi-State Returns Within UltraTax CS

This workshop will prepare your firm to engage successful businesses with multi-state operations and complete their tax work quickly with the aid of program utilities — leaving a healthy profit margin. Participants should have a working knowledge of UltraTax CS. Upon completion, you'll be able to:

- Process multi-state returns by using the multi-state allocation utility and the apportionment grid
- Enter tax return information for individuals filing part-year returns and nonresident returns
- Enter tax return information for businesses filing across various state lines by using the 1040 AGI worksheet, the apportionment association in assets, and the everywhere override utility in the apportionment grid

Level: Advanced (100 minutes)

Speaker: Thomson Reuters

Session: E-21 (Friday, 9:30 - 11:10 a.m.)
I-21 (Saturday, 8:30 - 10:10 a.m.)



Reviewing Returns Within UltraTax CS

In this session, you will learn how UltraTax CS provides powerful review tools that can be used to track return data, ensure accuracy, and review returns seamlessly. See these tools and how they can assist you in reviewing a client's return and offering tax advice. Participants should have a working knowledge of UltraTax CS. Upon completion, you'll be able to:

- Review diagnostics
- Add tick marks, field notes, and client notes
- View prior year data
- Find and request missing data
- Review reports for both individual and business entities

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: D-19 (Thursday, 3:10 - 4:50 p.m.)
I-20 (Saturday, 8:30 - 10:10 a.m.)



Sales Tax Update

This workshop will provide an overview of key sales and use tax developments in 2019. Topics covered include economic nexus, marketplace facilitators, and expansion of the tax base to services, digital goods, and cannabis. Upon completion, participants will have an understanding of current nationwide trends in sales, use taxation, and be able to identify emerging issues.

Level: Overview (100 minutes)

Speaker: Thomson Reuters

Session: I-22 (Saturday, 8:30 - 10:10 a.m.)



Section 199A: Everything You Must Know and More!

Considered one of the most intricate and complex computations enacted under the TCJA, this course will simplify the mechanics of the Section 199A deduction computation, expand upon key terms and definitions, such as specified service trade or business (SSTB), wages, qualified trade or businesses, and applicable wage limitations. After attending this course, participants should have the working knowledge to compute the Section 199A across a variety of businesses and taxpayers.

Level: Intermediate (50 minutes)

Speaker: Thomson Reuters

Session: A-21 (Thursday, 9:30 - 10:20 a.m.)
F-21 (Friday, 11:40 a.m. - 12:30 p.m.)



Tax Research Made Simple Using Checkpoint Edge

In this class, you will learn how to use Checkpoint Edge to find answers to your tax questions faster. You will also learn how to take advantage of the predictive technology, so that even when you aren't really sure what you're asking, your answer will still surface. Join us to learn how to easily use the new state-of-the-art artificial intelligence. Upon completion, you will be able to:

- Utilize artificial intelligence on Checkpoint Edge to find answers to tax questions
- Navigate search results
- Use Concept Markers to have Checkpoint Edge guide you to your answer

Level: Basic (50 minutes)

Speaker: Thomson Reuters

Session: F-20 (Friday, 11:40 a.m. - 12:30 p.m.)
G-20 (Friday, 1:50 - 2:40 p.m.)



TCJA with GoSystem Tax RS

The Tax Cuts and Jobs Act (TCJA) was signed on December 22, 2017 ushering in major changes to federal tax policy. Now is the time to revisit the data entry needed for TCJA and discuss difficulties through the last year.

Level: Intermediate (50 minutes)

Speaker: Thomson Reuters

Session: G-18 (Friday, 1:50 - 2:40 p.m.)



The Nuts and Bolts of the Research and Development Tax Credit

No more a credit of the past! This fifty-minute session will discuss the major provisions of the R&D tax credit which has evolved and expanded over time, and is now a permanent tax benefit under the PATH Act. Learn about the R&D credit overview and descriptions, technical updates, opportunities and concerns, and even how small businesses (less than \$5 million in gross receipts) are benefiting from this important tax credit.

Level: Basic (50 minutes)

Speaker: Thomson Reuters

Session: B-21 (Thursday, 10:50 - 11:40 a.m.)



Time-Saving Tips on Federal Tax Research Using Checkpoint

Join us for an action-packed class that is full of functionality tips, tricks, shortcuts, and hidden gems that will save you research time. The content covered includes features from common functionality questions, or features that get the biggest “ooohs” and “aaahs” when we show them. If you are a tax researcher that is self-taught on Checkpoint, haven’t had training in a while, or just want to increase your knowledge and research efficiency, this class is for you!

Level: Intermediate **(100 minutes)**

Speaker: Thomson Reuters

Session: E-20 (Friday, 9:30 - 11:10 a.m.)



Time-Saving Tips on Federal Tax Research Using Checkpoint

See it, do it, and learn it! This hands-on course takes a deep dive into functionality tips, tricks, shortcuts, and hidden gems that will save you research time. The content covered includes features from common functionality questions, or features that get the biggest “ooohs” and “aaahs” when we show them. If you are a tax researcher that is self-taught on Checkpoint, haven’t had training in a while, or just want to increase your knowledge and research efficiency, this class is for you!

Level: Intermediate **(100 minutes)**

Speaker: Thomson Reuters

Session: I-3 (Saturday, 8:30 - 10:10 a.m.)



Tools that Reduce Manual Data Entry Within GoSystem Tax RS

This workshop will cover time saving features that will reduce manual data entry for you and your staff. Using features like:

- Various import/export capabilities
- Data connection
- API functionalities

Level: Intermediate **(100 minutes)**

Speaker: Thomson Reuters

Session: C-18 (Thursday, 1:00 - 2:40 p.m.)



Track the Progress of Returns in UltraTax CS Using the Client Status Workflow Tool

This course will help you discover the Client Status system, a tool in UltraTax CS that maximizes your firm’s workflow process and tracks efficiency seamlessly. Participants should have a working knowledge of UltraTax CS. Upon completion, you’ll be able to:

- Add and customize client status events
- View graphs/grids of client status events
- Increase daily task efficiency by filtering the client status list
- Integrate client status events with Practice CS
- Transfer UltraTax CS invoice amounts to Practice CS

Level: Intermediate **(50 minutes)**

Speaker: Thomson Reuters

Session: G-19 (Friday, 1:50 - 2:40 p.m.)



Trial Balance Usage and Integration With GoSystem Tax RS

This lecture-style class will cover time saving features using the trial balance bridge to process returns. We’ll show you how to use various import methods and code it properly to fill out the tax return. After this class, you will be able to:

- Understand the process to import chart of account and trial balance information through a spreadsheet import
- Identify and assign tax coding for integration
- Understand how to adjust balances for appropriate presentation in financial statements or tax returns

Level: Intermediate **(50 minutes)**

Speaker: Thomson Reuters

Session: B-18 (Thursday, 10:50 - 11:40 a.m.)



Troubleshooting Your e-File Using GoSystem Tax RS

This workshop will walk you through troubleshooting your electronic files through GoSystem Tax RS. In this course, you will learn:

- How to find the fields required for e-Filing
- Attachment to e-File
- How to read and clear XML Validation errors
- How to use e-File Viewer to determine what information is in the e-File being sent to the IRS

Level: Intermediate **(50 minutes)**

Speaker: Thomson Reuters

Session: F-18 (Friday, 11:40 a.m. - 12:30 p.m.)



UltraTax CS Paperless Tax Workflow Overview

This fast-paced workshop will demonstrate tax return workflow tools in UltraTax CS that can streamline the entire return process. Participants should have a working knowledge of UltraTax CS. Upon completion, you’ll be able to:

- Use automatic data gathering through Web Client Organizers, Source Document Processing (OCR), and Source Data Entry, as well as from integration with other software
- Make the review process more efficient using multiple monitors and online review
- Deliver drafts, final tax returns, and actionable items securely through client portals

Level: Overview **(100 minutes)**

Speaker: Thomson Reuters

Session: E-22 (Friday, 9:30 - 11:10 a.m.)



Utilizing Onvio Firm Management in Your UltraTax CS Tax Workflow

During this course, we will walk through how to incorporate Onvio Firm Management into your Tax Workflow process. We will see how Onvio allows a streamlined approach from information gathering to sharing the tax return deliverable. Participants should have a working knowledge of UltraTax CS. Upon completion, you'll be able to:

- Create relationships between clients and contacts
- Utilize Onvio integration with UltraTax CS to gather and review tax information
- View E-Signatures within Onvio
- Share the tax return with your client

Level: Basic (100 minutes)

Speaker: Thomson Reuters

Session: D-16 (Thursday, 3:10 - 4:50 p.m.)



What to Expect When Onboarding to UltraTax CS

Join our onboarding team to discuss change management topics and share your experiences with other firms on changes that your firm has gone through. This moderated discussion will encourage new ways of thinking about change and how you can gain valuable insights from the past to inform the future.

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: A-16 (Thursday, 9:30 - 10:20 a.m.)



What's Been Added in GoSystem Tax RS Over the Past Few Years

GoSystem Tax RS is a powerful system, but are you using all the features and capabilities? Join us in this workshop as we explore the enhancements over the past few years. Participants should have a working knowledge of GoSystem Tax RS.

Level: Overview (100 minutes)

Speaker: Thomson Reuters

Session: D-18 (Thursday, 3:10 - 4:50 p.m.)



What's New in GoSystem Tax RS

This workshop will allow participants to gain an understanding of the new software features and functionality for the upcoming tax season as well as planned initiatives for business and individual returns.

Level: Overview (100 minutes)

Speaker: Thomson Reuters

Session: E-18 (Friday, 9:30 - 11:10 a.m.)



What's New in UltraTax CS

In this session, you will get a jump on the next tax season with a preview of several new and powerful system-wide, entity-specific, and workflow improvement features that will be in this year's UltraTax CS products. We'll also discuss other new services, products, and features that you can expect to see with 2019 UltraTax CS. Join us to truly understand how the new release impacts your firm and get the most productivity from your UltraTax CS software.

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: A-22 (Thursday, 9:30 - 10:20 a.m.)

B-22 (Thursday, 10:50 - 11:40 a.m.)

F-22 (Friday, 11:40 a.m. - 12:30 p.m.)



Will Your Interest Be Limited? Understanding the New 163(j) Interest Rules

Do you understand the new interest expense limitation rules of Section 163(j)? If not, this the course is for you! While a significant portion of companies and business will be subject to the interest limitation rules, it is important to know when a limitation exists, how to compute the limitation, the expanded definitions of interest expense, how to treat disallowed interest expense and how the limitation is computed for pass-through entities such as partnerships and S Corporation. After taking this course, you'll gain all the necessary knowledge to apply the interest rules to know if your business or client's interest expense will be limited.

Level: Intermediate (50 minutes)

Speaker: Thomson Reuters

Session: G-21 (Friday, 1:50 - 2:40 p.m.)



Technology

Apps You Love Researched by Industry Experts

Are we, as a society, at the point in the hype circle where firms can use mobile technology to improve efficiency and client service? If so, what types of apps can help, and how? Join this lively workshop to:

- Learn about the apps that experts in the tax and accounting profession use
- Learn about the types of work and tasks firms are using apps to improve
- And share your own experiences with apps, good and bad

We can't wait to go down the App Path together!

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: B-24 (Thursday, 10:50 - 11:40 a.m.)



Checkpoint Marketing Social Media Manager Basics

Looking for an introduction, or a refresher, on the Checkpoint Marketing Social Media Manager? Join us during this session where we will walk you through the significant features that will help your firm streamline its efforts. We'll cover connecting social media sites, accessing and distributing content, and reviewing engagement activities. Upon completion, you'll know how to:

- Connect social media sites to the platform and modify settings for connected sites
- Share various types of content to multiple social media sites quickly and easily
- Review and respond to engagement activities
- And more!

Level: Basic (50 minutes)

Speaker: Thomson Reuters

Session: G-23 (Friday, 1:50 - 2:40 p.m.)



Get Exclusive Access to Our Latest AI-Enabled Prototypes and Solutions for Tax Professionals

Join us for an exciting future view of tax work augmentation with AI-enabled solutions. Learn more about how we view AI/ML and its application in solving real user problems, and participate in the conversation with our innovation leaders. Space is limited and selected participants will be contacted prior to the conference.

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: C-23 (Thursday, 1:00 - 2:40 p.m.)

E-23 (Friday, 9:30 - 11:10 a.m.)



Getting Your Questions Answered With Digital Resources!

Do you ever find yourself in a time crunch and just need a quick answer about CS Professional Suite and Onvio applications? We've got you covered! Come learn about all the various digital resources Thomson Reuters offers within the Help & How-To Center, the Community, chat, and more!

Level: Basic (50 minutes)

Speaker: Thomson Reuters

Session: A-26 (Thursday, 9:30 - 10:20 a.m.)

F-23 (Friday, 11:40 a.m. - 12:30 p.m.)



Help Shape the Future of Tax Professional Work Solutions (DOES NOT QUALIFY FOR CPE)

We are excited to announce a new workshop stream at this year's Synergy that is designed to put you in the driver seat of our latest Thomson Reuters Tax Professional designs. Upon entering the new Synergy UX lab, you will be greeted by your personal moderator and be asked to perform important solution-shaping tasks using a new design. Your valuable feedback will be used to help make your professional work more effective, efficient, and scalable.

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: A-Innovation (Thursday, 9:30 - 10:20 a.m.)

B-Innovation (Thursday, 10:50 - 11:40 a.m.)

F-Innovation (Friday, 11:40 a.m. - 12:30 p.m.)

G-Innovation (Friday, 1:50 - 2:40 p.m.)



How to Build a Knowledgebase and Intranet Employees Will Love

In this workshop, you'll learn how to collect and categorize your existing documentation, manage the maintenance of your content, develop new content, and deliver your content to your staff when and where they need it. This course is designed for professionals that need to work on content organization within their firm. It's a solution that every business needs to have, including yours! Upon completion of this course, you will be able to:

- Identify processes that support collection, management, and publishing of information

Level: Overview (100 minutes)

Speaker: Thomson Reuters

Session: H-14 (Friday, 3:10 - 4:50 p.m.)



Microsoft OneNote for Accounting Professionals

In this course, we'll show you how using OneNote will change the way you capture notes and ideas, and access them on the go. OneNote is a powerful tool that will help you get and stay organized, and its integration with Outlook and the other Microsoft Office suite products will help you stay on task. If you've never used OneNote or feel like you're not using it correctly, you won't want to miss this class. Upon completion of this course, you will be able to:

- Identify the difference between notebooks, sections, and pages
- Understand the basic functionality of OneNote to begin using it to capture notes and ideas

Level: Basic (100 minutes)

Speaker: Thomson Reuters

Session: H-24 (Friday, 3:10 - 4:50 p.m.)

I-24 (Saturday, 8:30 - 10:10 a.m.)



Microsoft Outlook for Accounting Professionals

In this course, we will discuss how you can take your knowledge of Microsoft Outlook to a whole new level! You'll walk away with several quick solutions that will make you more efficient. If you're new to Outlook, or have been using Outlook for years, you won't want to miss this class! Upon completion of this course, you will be better able to:

- Take advantage of Outlook's advanced email, calendar, and task functions
- Create and use templates to drastically reduce time
- Identify how to clean up your inbox by scheduling emails as calendar appointments or tasks

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: C-24 (Thursday, 1:00 - 2:40 p.m.)



Microsoft Teams for Accounting Professionals

Attending this workshop will help you to embrace Microsoft Teams as a powerful collaboration tool for your firm. Teams integrates the people, the content, and the tools your team needs to be more engaged and effective. Participants should have a working knowledge of Microsoft Office. Upon completion, you'll be able to:

- Define the difference between channels and teams
- Use Teams for individual and group chats
- Easily navigate and utilize helpful functions like searching and bookmarking
- Execute calls and screen sharing in the application
- Adjust preferences and settings
- Integrate with other applications

Level: Basic (100 minutes)

Speaker: Thomson Reuters

Session: E-24 (Friday, 9:30 - 11:10 a.m.)



Top 10 Microsoft Excel Tips for Accounting Professionals

In this course, we will discuss how you can be more efficient with Microsoft Excel. Do you consider yourself proficient with Excel but not an expert? You won't want to miss this class! Upon completion of this course, you will be able to:

- Apply 10 quick tips to bring greater efficiency to using Microsoft Excel
- Identify how to easily navigate, utilize timesaving functions
- Apply consistent formatting
- Customize the status bar

Level: Intermediate (50 minutes)

Speaker: Thomson Reuters

Session: A-24 (Thursday, 9:30 - 10:20 a.m.)

G-24 (Friday, 1:50 - 2:40 p.m.)



What's Cool in Technology These Days

New technology appears every day, from advances in hardware and software to security and entertainment. Who can keep up? More importantly, what's behind the hype, and how can you decide what warrants a closer look for practical implementation in the workplace today? This workshop will help you find the cool technology that offers value to your firm by saving time and improving productivity. We'll also take a look at some considerations for the near future.

Level: Overview (100 minutes)

Speaker: Thomson Reuters

Session: D-24 (Thursday, 3:10 - 4:50 p.m.)

H-21 (Friday, 3:10 - 4:50 p.m.)



Trends in the Profession

4 Ways to Effectively Leverage Social Media for Your Firm

Marketing techniques change as rapidly as tax laws and accounting standards. To remain competitive in the marketplace, grow your practice, and manage your firm's online reputation, you must keep up with the demands of your client base and reach new prospects. Prospects are more tech-savvy today than they were 10 years ago.

Many of them grew up with technology, or have adapted to it, so they expect to be served differently. There is more to social media marketing than merely having a Facebook page, LinkedIn account or Twitter profile. Social media provides an opportunity to build your brand equity and showcase your thought leadership. In this workshop we will review the different ways that you can leverage social media to remain relevant with clients, prospects, and potential new hires.

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: A-8 (Thursday, 9:30 - 10:20 a.m.)
G-8 (Friday, 1:50 - 2:40 p.m.)



Active Lead Generation and Firm Growth Through Networking

In our fast-paced digital world it's easy to overlook other effective ways to grow your business such as networking and referral relationships. Learn the art of "pain-free" networking from an industry leader on how to effectively build relationships, brand your business and successfully grow with proven strategies – and make it fun and purposeful! Cultivating face-to-face business relationships is the most effective way to grow your business. In this workshop, you will learn business etiquette and skills needed to make a powerful first impression.

- Learn strategies for creating a Referral Partner network to generate leads
- Identify networking events to maximize your time and investment
- Work a room and get to the people you need to meet to grow your business
- Learn the "Giver-Get" theory to create a powerful circle of influence

Bring your business cards, as we will make key connections during this session that will help you put in motion the ideas and strategies that you learn throughout the conference.

Level: Overview (100 minutes)

Speaker: Marilyn Manning, Director of Franchise Development, Payroll Vault

Session: D-23 (Thursday, 3:10 - 4:50 p.m.)



Advisory Service Opportunities Based on What We Now Know With TCJA

TCJA is here and is impacting your clients! Do you know how to use this sweeping tax law change to help you deliver Advisory Services? This workshop will focus on reviewing what are the greatest opportunities to provide Advisory Services to your new and existing clients. Participants should have a reasonable working knowledge of TCJA. Topics covered will include:

- Identifying client opportunities
- Providing a client value deliverable
- Writing an advisory engagement based on TCJA changes
- Execution of new planning opportunities

Level: Overview (50 minutes)

Speaker: Paul Miller, Business by Design

Session: F-28 (Friday, 11:40 a.m. - 12:30 p.m.)



Advisory Services: Moving Your Practice Forward

How are you getting paid for the value (e.g., ideas, strategies, and solutions) you bring to your clients, separate from the physical compliance deliverables? How are you defining the clarity and setting the proper expectations in your client relationships? How are you creating highly duplicable services to help your clients reach their financial goals and aspirations? Join us for a Practice Forward panel discussion where you'll learn how several of your peers have taken steps to enhance clarity in client relationships, improve margins, and create a progressive set of new client services that extend beyond compliance work. Panelists will share their experiences with planning and executing a business model shift, including aligning staff, identifying monetizable new client services, adopting supportive technology and workflow, and much more. It's all part of the journey to building a firm that offers higher value to clients, operates in a more sustainable business model, and generates a healthier bottom line. Learn how to become a breakthrough firm that is set apart from traditional accounting practices.

Level: Overview (100 minutes)

Speaker: Thomson Reuters

Session: E-28 (Friday, 9:30 - 11:10 a.m.)



An Essential Future Requirement: Becoming a Thought Leader

As we move deeper into the world of consulting, many in the firm will be pulled into various niches that they will build great expertise in. Building your expertise and knowledge is only the first step in becoming a true thought leader. In this workshop, we will explore the why, the how, and finally the rewards of becoming a thought leader in your firm. Topics will include:

- How the profession is evolving and why thought leadership is an essential skill
- The new habits that you must establish in order to move forward with your clients at a new and exciting level
- The rewards that you will personally gain, as well as the rewards you can bestow on your clients and team members
- Actions that you can start working on, before you go home!

Level: Overview (100 minutes)

Speaker: Sandra Wiley, President, Boomer Consulting, Inc.

Session: D-27 (Thursday, 3:10 - 4:50 p.m.)



Art of the Deal on Selling Accounting Platforms

In this workshop, you will hear from the managing partner of a growing tax and accounting firm that has placed extra focus on their accounting service offerings. Through trial and error, they have perfected winning new business with their accounting and payroll service offerings. In addition, their approach has allowed them to close deals with a higher quality client and secure and bundle additional services such as tax planning, payroll, and accounts payable management. We discuss foundational design ideas, depicting all aspects of an accounting system, positioning you to build your own service offering focused on accounting services.

Expect to learn:

- How to convert a \$1,500 prospective client to a \$15,000 client or larger
- How to leverage your Thomson Reuters products as a total package and compete with QuickBooks
- How to lock your client into a long-term relationship
- How to forget geography and serve clients anywhere

Level: Basic (50 minutes)

Speaker: John Seale, CPA.CITP CPA –

Audit Accounting & Tax Partner at RBSK Partners PC

Session: B-28 (Thursday, 10:50 - 11:40 a.m.)



C&M – NT

Best Practices for Managing a Remote Team

A recent Gallup poll observed that up to 43 percent of employed Americans work at least partially remotely — and that offering work-from-home benefits proves advantageous for companies in terms of employee retention. As we continue to immerse ourselves in the digital age and work to reduce our carbon footprint, it has become increasingly important for companies to ensure that their remote employees are engaged, productive, and performing at the highest level. In this workshop, you will learn best practices that will help you identify the skill set needed for a remote employee, ensure they are engaged, and proven techniques to manage a successful remote team.

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: B-27 (Thursday, 10:50 - 11:40 a.m.)

F-27 (Friday, 11:40 a.m. - 12:30 p.m.)



NEW BMGT – NT

Building a Firm Focused on Trusted Advisor and Client Services: Your New Firm Model

Our featured speaker from prior year's Partner Summits will share an overview of how his firm created a trusted advisor relationship with clients, developed multiple income streams, and established a unique value proposition. You'll hear how his firm helps other entrepreneurs and small businesses become more tax efficient and make smarter business decisions, while providing traditional accounting firm services. Upon completion, you will be able to:

- Establish how you can offer and build your own trusted advisor services
- Create a business model to support them and help clients rely on you by understanding the value your firm provides
- Walk away with ideas to implement in your own practice

Level: Overview (100 minutes)

Speaker: Paul Miller, Business by Design

Session: C-28 (Thursday, 1:00 - 2:40 p.m.)



BMGT – NT

Building Firm Value: Positioning for Exit

Every firm will have a transition event. One major challenge to most firms is that they have not considered how ownership might exit, and subsequently are unprepared. Being prepared and knowledgeable, regardless of when an exit might occur, is critical. Let's look at how the best firms are designed for increased value and a successful exit. Sean will share the #1 tip from the Angel Investment Network. Upon completion, you will be able to:

- Understand value drivers through a theoretical valuation
- See how to build a network and actively identify buyers
- Learn how to manage the negotiation process
- Prepare and recognize key components to the transition

Level: Intermediate (100 minutes)

Speaker: Sean Manning. CEO – Founder, Payroll Vault

Session: H-26 (Friday, 3:10 - 4:50 p.m.)



NEW BMGT – NT

Change Readiness for Tax Professionals

You want to implement a new change...now what? Take the first step toward turning uncertainty into opportunity by learning key change readiness concepts and skills for embracing and successfully implementing change in your firm. In this workshop, you'll learn how to become an effective change leader by:

- Understanding the nature of change and how to become change ready
- Fostering skills for adapting to continual change and identifying opportunities for firm innovation and improvement
- Identifying and successfully executing enterprise-wide change initiatives using templates and workflow tools
- Recognizing how to use resistance to benefit your change initiative and how to best address factors that can prevent change from taking hold

Level: Intermediate (100 minutes)

Speaker: Thomson Reuters

Session: H-23 (Friday, 3:10 - 4:50 p.m.)

I-23 (Saturday, 8:30 - 10:10 a.m.)



NEW BMGT – NT

Collaborative Negotiation

Do both sides: a) feel a sense of accomplishment b) believe the other side cared c) want to work with each other again d) have confidence the other side will keep their word? If you can answer yes to these questions, then you have most likely negotiated collaboratively. During this insightful breakout, learn how to embrace courage for your own side and consideration for the other side. Upon completion, you'll be able to:

- Define and apply collaborative negotiation skills that enable business success
- Define skills to handle challenging conversations

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: G-27 (Friday, 1:50 - 2:40 p.m.)



Creating and Sustaining Continuous Firm Improvement

Lean Six Sigma is helping firms find quality and efficiency in their processes which result in higher profitability. Success is a combination of process improvement and commitment from all levels of the firm. Learn how to identify and address key areas for change and cultivate a culture of continuous improvement.

Level: Basic (100 minutes)

Speaker: Arianna Campbell, LSS Black Belt – Director, Boomer Consulting, Inc.

Session: D-7 (Thursday, 3:10 - 4:50 p.m.)



Creating Client Engagements Based on an Advisory Services Firm Model

Many firms like the idea of offering Advisory Services but struggle with how to create an engagement which contains clarity of scope and price. This workshop will take a deep dive into drafting your firms advisory and maintenance engagements. Upon completion, you will be able to:

- Design and price your own advisory services engagement
- Identify your firm's scope of services
- Capture unclaimed revenue for Advisory services provided but not billed
- Price and bundle maintenance services by the firm

Level: Overview (100 minutes)

Speaker: Paul Miller, Business by Design

Session: H-28 (Friday, 3:10 - 4:50 p.m.)



Creating Firm Culture, Definition, Distinction, and Decision

Every firm has culture, but top firms create and cultivate a positive and healthy work environment. This workshop will define business culture, explore a variety of culture influencers, and provide motivation and systems to evaluate and improve your culture. Essentially "De-bunking culture once and for all".

- What is a firm culture?
- Learn how a culture is defined
- Use technology to support your culture

- Identify both leadership and TEAM responsibilities
- Create a target outcome and culture action plan

Level: Overview (100 minutes)

Speaker: Sean Manning, CEO – Founder, Payroll Vault

Session: C-26 (Thursday, 1:00 - 2:40 p.m.)



Developing a Creative Reward Program That Truly Motivates

As our profession evolves, so must the rewards that we use to recruit, retain, and motivate our amazing team members. Developing a creative reward program takes time and some creative thinking. It also is always evolving and changing, however, the payoff is a team of collaborative and motivated talent. The work is absolutely worth the effort. In this workshop, we will explore:

- How to identify what will really motivate your team
- New reward program components that your firm could implement in the year ahead
- Real life stories of the reward programs your firm should be considering now
- A list of resources for your firm to explore

Level: Overview (100 minutes)

Speaker: Sandra Wiley, President, Boomer Consulting, Inc.

Session: C-20 (Thursday, 1:00 - 2:40 p.m.)



Employee Engagement: Building Accountability in Your Teams

In this workshop, we'll answer the question: What does it take to create a team that consistently works synergistically, is accountable for results, and meets deadlines? Managing multiple teams, working virtually, and increased complexity in our business environment demand that we maximize team engagement and performance. As leaders, we often miss opportunities to make important adjustments and course corrections with our teams when it really matters. This session is designed to help busy leaders gain insights and identify ways to maximize team engagement, accountability, and results. Upon completion, you'll be able to:

- Identify reasons why teams lack accountability
- Apply techniques to create more commitment to results in your teams
- Improve team performance and results

Level: Overview (100 minutes)

Speaker: Thomson Reuters

Session: C-27 (Thursday, 1:00 - 2:40 p.m.)



Employee Engagement: Productive, Efficient, and Happy

Building an engaged team is foundational to firm effectiveness and long-term success. Owners, managers, and each team member have a role to play in supporting a healthy and happy work environment. We will discuss all aspects of identifying, training, and supporting staff that will have high retention and increase firm productivity. Plus, discover what Fortune 500 companies are replacing performance evaluations with. Upon completion of this workshop, you'll be able to:

- Create a basic firm framework and identity to support your team
- Evaluate the employment Landscape and Multi-generational impact
- Create an environment of trust to avoid toxicity
- See how human connection can support change management

Level: Overview (100 minutes)

Speaker: Sean Manning, CEO – Founder, Payroll Vault

Session: D-26 (Thursday, 3:10 - 4:50 p.m.)



Finding Capacity

Adjustments to your firm are needed to adapt to a changing environment and market. One of the first reactions that people experience with a massive change in mindset, skillset, and toolset, is feeling overwhelmed and communicate in the form of resistance: “Where will I find the time to learn and implement an advisory role and function?” In this session, we will tackle where to find the time and lower the angst that is being felt. Session attendees will be facilitated through an exercise to help identify key areas and strategies for increasing capacity.

Level: Basic (100 minutes)

Speaker: Arianna Campbell, LSS Black Belt – Director, Boomer Consulting, Inc.

Session: C-22 (Thursday, 1:00 - 2:40 p.m.)



Firm Secrets to Success: Real Actionable Ideas

This workshop isn’t just about a bunch of theoretical ideas to consider. This workshop is about actual steps taken by an Indiana firm to become successful, attract good clients, retain staff, and continue to expand and grow. The managing partner will bring total transparency to the group including their firm’s secrets to success from the simplest tactics to the most innovative ideas. Upon completion of this workshop, you’ll be able to:

- Start a conversation about how to energize your firm’s growth and success objectives
- Get partners and staff excited about new approaches to achieve goals
- Start on a path to more profits and higher compensation for staff

Level: Basic (100 minutes)

Speaker: John Seale, CPA.CITP CPA – Audit Accounting & Tax Partner at RBSK Partners PC

Session: I-26 (Saturday, 8:30 - 10:10 a.m.)



Get Yourself Out of Operations So You Can Be a Firm Leader

Are you stuck in operations? Learn how you can focus your attention on managing your practice and becoming a firm leader instead of being immersed in operations. You will hear about one firm owner’s successful transition out of operations into the role of the business leader for the firm. In this session, you will examine those items you do for the firm that can be completed by other internal or external resources. Learn about tools and processes that are available to help you with the transition. Upon completion, you will be able to:

- Examine the things you do for the firm (Are they the right things?)
- Take a critical look at your internal processes and look for ways to improve upon them

- Leverage those tools and resources available to you to get yourself out of operations
- Walk away with a plan to maximize your time and value to the firm

Level: Intermediate (100 minutes)

Speaker: Mark Martukovich, CPA – Managing Partner at FMA, C.P.A.

Session: I-28 (Saturday, 8:30 - 10:10 a.m.)



Lean Six Sigma CPA Firm Administration

Roman will take attendees through his Lean Administrative Optimization which discusses practical examples of how firms are optimizing their back-office operations. Most firms focus process improvement on tax and assurance practices, completely overlooking their own internal operations. Lean Administration will explain how Lean Six Sigma methodologies can improve your firm’s Practice Management, Internal Accounting, Payroll, and Knowledge Management processes.

Level: Overview (50 minutes)

Speaker: Roman Kepczyk, CPA.CITP, CGMA – Director of Firm Technology Strategy, Right Networks

Session: B-26 (Thursday, 10:50 - 11:40 a.m.)



Leveraging Change in Your Office

Change comes from a variety of sources — and for a variety of reasons. When tools and infrastructure components change in a firm, we often point to the end result as the place where the benefits are found. But the opportunity to achieve gains throughout the change process is one we often miss. In this workshop, we’ll discuss the major stages of change and how to capture the opportunity through each stage.

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: A-28 (Thursday, 9:30 - 10:20 a.m.)



Make Your Firm a Trusted Advisor

Do your clients see you as an expense or as an investment? Hear about one firm’s journey from a traditional CPA firm to one that leads with business advisory services. Learn how to break away from the daily compliance grind and reshape your firm to offer advisory services that will provide long-term rewards. This workshop will educate you on the process for identifying and soliciting prospective new clients and how to handle existing clients throughout the transition. Discover the benefits of change management and blazing your own trail to help your firm and clients thrive.

Level: Overview (100 minutes)

Speaker: Mark Martukovich, CPA – Managing Partner at FMA, C.P.A.

Session: D-28 (Thursday, 3:10 - 4:50 p.m.)



Making Engaging Client Presentations

In this fun and participative workshop, we'll help you improve your skills and confidence in making client presentations. This workshop focuses on content and delivery techniques to enhance your presentation power and impact. Participants should have a working knowledge of basic presentation skills. Upon completion, you'll be able to:

- Use proven techniques to organize and deliver engaging client presentations
- Identify ways to add substance and punch to your presentation
- Practice and apply a range of delivery techniques including using your mind, body, face, and voice

Level: Advanced (100 minutes)

Speaker: Thomson Reuters

Session: I-27 (Saturday, 8:30 - 10:10 a.m.)



Optimizing Your Tax Season Debrief

Another busy season under your belt and it's time to coast for a bit... WRONG! Now is the optimum time to meet with the tax team to discuss what went well, what didn't, and what you are going to do about it before the next busy season hits. Roman will walk through the process to optimize your Post-Busy Season Debrief meeting including providing attendees with the questions to ask and sharing "LEAN" facilitation tools to help firms identify the biggest opportunities for improvement to implement following the conference, all backed by the latest CPAFMA survey findings.

Level: Intermediate (50 minutes)

Speaker: Roman Kepczyk, CPA.CITP, CGMA –
Director of Firm Technology Strategy, Right Networks

Session: F-26 (Friday, 11:40 a.m. - 12:30 p.m.)



Preparing for the Future: Transforming Your Firm

This informative workshop will assist you in developing strategies focused on preparing your firm to respond to the challenges of exponential change to how firms do business. As the pace of change will never be slower than it is today, firms that position themselves to leverage talent to serve clients beyond compliance and accounting have a great opportunity to establish an incredible brand for the future. After attending this workshop, you will walk away with knowledge to help you:

- Identify ways to reduce hours worked while getting more work done
- Appreciate the benefits of strategic planning for your firm and clients
- Build employee engagement
- Design a culture of commitment to continuous improvement
- Leverage innovation of your team
- Refine your processes and workflow to maximize capacity

Level: Overview (100 minutes)

Speaker: Dennis E. Sherrin CPA, CVA, CFF, CGMA –
Managing Shareholder, Hartmann, Blackmon & Kilgore, P.C.

Session: E-7 (Friday, 9:30 - 11:10 a.m.)



Set Yourself Apart From the Competition – Partner With a Financial Advisor and Become More Valuable to Your Clients

Clients today expect a higher level of service from the professionals who help them manage their financial interests. Offering financial planning services may be the most profitable way to grow your business and you don't have to become a financial advisor to do it. Learn from one of Barron's Top 100 Financial Advisers on how to distinguish yourself from your competition in this age of innovation. This includes panel discussion with CPA practitioners who have partnered a financial advisor. This workshop will teach you how to:

- Evolve your practice to deliver a full-service experience that exceeds client expectations
- Develop a financial services division in your practice without having to become a financial advisor
- Select the most appropriate way for you to partner with a financial advisor to deliver specialized financial planning services

Level: Advanced (100 minutes)

Speaker: Jonathan Kuttin, CRPC®, AAMS®, AWMA®, CMFC®, CRPS® –
Private Wealth Advisor and Franchise Consultant, Kuttin Wealth Management

Session: C-13 (Thursday, 1:00 - 2:40 p.m.)
E-26 (Friday, 9:30 - 11:10 a.m.)



Situational Leadership

In this workshop, you will learn to "read" them, "lead" them, "succeed" with them. This is situational leadership in a nutshell. Knowing both the "skill" and "desire" level of each team member is essential to balancing our task oriented and confidence building leadership behaviors. We think you'll be glad that you joined us for this exciting and informative breakout session. Upon completion, you'll be able to:

- Bring alignment of task and relationship leadership behaviors to skills and desires of individual team members
- Adjust your leadership approach to each individual situation

Level: Overview (50 minutes)

Speaker: Thomson Reuters

Session: A-27 (Thursday, 9:30 - 10:20 a.m.)



The Art of the Ask – Grow Your Practice With Referrals

Hear from a leader in financial services who has mastered the most effective lead generation strategy, "The Ask". This workshop will help you hone your skills to identify and develop natural referral market opportunities with clients and prospects to increase lead generation. In this workshop, growth-oriented practitioners will learn:

- The three keys to "The Ask"
- The secret to asking your best clients for referrals without actually asking
- How to overcome common objections to referrals

Level: Intermediate (50 minutes)

Speaker: Brian Mora, Ameriprise

Session: G-28 (Friday, 1:50 - 2:40 p.m.)



Using Emotional Intelligence to Achieve Results

In this workshop, you will learn that “Emotions, when used correctly, can make us smarter than intellect alone...” We’re confident you’ll come away with valuable insights about what we observe and what we do. Please join us. Upon completion, you’ll be able to:

- Identify how Emotional Intelligence (EI) is applied to enhance work relationships performance and productivity
- Examine the main components of EI
- Complete a self-assessment to measure how often you take advantage of each EI component

Level: Overview **(100 minutes)**

Speaker: Thomson Reuters

Session: H-27 (Friday, 3:10 - 4:50 p.m.)



Using Lean Principles to Maximize the Role of Technology

Learn how Lean Six Sigma concepts and techniques are being applied in public accounting firms to maximize the utilization and investment in technology. Efficiency is about more than just a technology program - it’s about aligning your people with processes that maximize value and minimize waste. The structure and discipline of Lean Six Sigma allow professionals to maximize buy-in to change. Upon completion of this workshop, you will be able to:

- Use a 5-Step Process Improvement Model to facilitate process and technology change within an organization
- Have strategies to maximize buy-in to change at every level
- Identify roles and responsibilities of IT professionals in process improvement initiatives

Level: Intermediate **(100 minutes)**

Speaker: Arianna Campbell, LSS Black Belt – Director, Boomer Consulting, Inc.

Session: E-27 (Friday, 9:30 - 11:10 a.m.)



Trailblazing Women: Learning From Women Leading in Tax and Accounting

In this workshop, you will hear how a diverse panel of women trailblazers have built their practice and attracted clients. This workshop focuses on their experiences and recommendations to rise to the next level of leadership. Upon completion, you’ll be able to:

- Navigate how to use negotiation tactics to elevate your practice and attract clients
- Prepare to transition into the role of Partner and building your own firm
- Innovate and move your practice out of compliance and in advisory
- Uncover ways to build the culture at your firm

Level: Overview **(100 minutes)**

Speaker: Thomson Reuters

Session: H-7 (Friday, 3:10 - 4:50 p.m.)



Your Client Just Fired You, Now What?

Attending this workshop will help you identify your responsibilities in responding to records requests from former clients. Upon completion, you’ll be able to:

- Understand your obligations under the AICPA Code of Professional Conduct
- Locate standards adopted by your state CPA society or board
- Describe your professional responsibilities under Circular 230
- Comply with rules surrounding privileged communications and disclosures to third parties

Level: Intermediate **(50 minutes)**

Speaker: Thomson Reuters

Session: G-26 (Friday, 1:50 - 2:40 p.m.)



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