

2019  
PASBA

MARKETING  
& TECHNOLOGY  
CONFERENCE

CLEARWATER BEACH, FL | MAY 6-9, 2019



## MONDAY

8:00am - 9:00am	Blueprint Attendee & Instructor Registration & Breakfast
9:00am - 5:00pm	Blueprint Classes (University, Mastery, Sales)
12:00pm - 1:00pm	Lunch for Blueprint Attendees & Instructors
2:00pm - 5:00pm	Registration

## TUESDAY

8:00am - 9:00am	Breakfast in Exhibit Hall
9:00am - 9:15am	Conference Opening, <i>Kurt Rickhoff</i>
9:15am - 10:00am	How Accounting Firms Can Use Social Media and Online Marketing to Generate Ideal Clients, <i>Jody Gouge, VisionPATH</i>
10:00am - 10:30am	How Do I Get Google Reviews and What Impact Have they Had on My Firm?, <i>Frank Fiore &amp; Brian Paulson</i>
10:30am - 11:00am	Break in Exhibit Hall
11:00am - 12:00pm	Tax Season Wrap-Up: What will You Change for Next Year?, <i>Tim Nolan, Brian Roark, Hunter Robinson, &amp; Alan Scher</i>
12:00pm - 1:00pm	Lunch
1:00pm - 1:30pm	Sponsor Demo
1:30pm - 2:15pm	Transitioning from a Backward Looking Accountant to a Forward Looking Advisor, <i>Paul Latham, Hayden Rock</i>
2:15pm - 3:00pm	Advisory Light, <i>David Lucier</i>
3:00pm - 3:15pm	Break in Exhibit Hall
3:15pm - 4:00pm	Using Technology in the Sales Cycle, <i>Vince Howard &amp; Tony Mauro</i>
4:00pm - 4:30pm	Sponsor Demo
4:30pm - 6:00pm	Reception & Exhibit Showcase

## WEDNESDAY

8:00am - 9:00am	Breakfast
9:00am - 12:00pm	Roundtable Discussions: Issues Facing ALL Practice Sizes Integrating Apps in QBO Featuring Receipt Bank, Practice Ignition, Hubdoc, Liscio & More to Come! Recruiting & Hiring, <i>John Drawdy &amp; Brian McGinn</i> Growth Through Marketing/How to Get New Clients, <i>Jason Eger &amp; David Flynn</i>
10:20am - 10:40am	Break in Exhibit Hall
12:00pm - 1:00pm	Lunch
1:00pm - 1:30pm	Sponsor Demo
1:30pm - 4:30pm	Practice Size Discussions (Small, Medium, Large)
3:00pm - 3:15pm	Break in Exhibit Hall
4:30pm - 5:00pm	Sponsor Demo
6:00pm - 6:30pm	Cocktail Reception
6:30pm	Awards Dinner

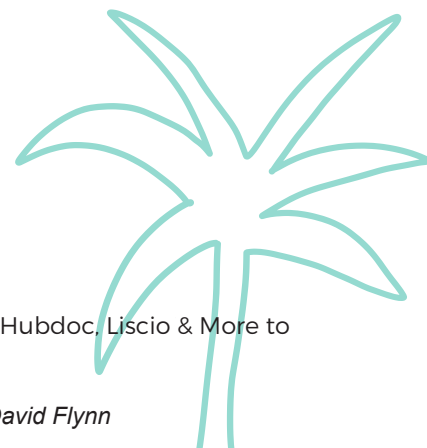
## THURSDAY

8:00am - 9:00am	Breakfast
9:00am - 11:00am	The Tools, People, & Offerings that Helped Our Firm Grow 10X, <i>Kenji Kuramoto</i>
11:00am - 11:30am	Conference Closing & Session Ideas
12:00pm - 5:00pm	FRG/SRG Sessions

## FRIDAY

8:00am - 12:00pm	FRG/SRG Sessions
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TENTATIVE  
**AGENDA**  
MAY 6-9, 2019



## AWARDS DINNER

**Wednesday, May 8 | 6:30 PM**

We will once again honor the accomplishments of our members at the 13th Annual PASBA Awards Dinner. Please join us to toast your fellow members!

# HOTEL INFORMATION

## OPAL SANDS RESORT

430 S Gulfview Blvd., Clearwater Beach, FL 33767

**Hotel Reservations:** 855-335-1087



*If booking pre or post conference, please call the hotel directly to make your reservation.*

*The group rate is guaranteed until April 19, 2019 unless the room block fills prior to that date. Rooms and/or modifications requested after the deadline of April 19, 2019 (or after the block has filled) will be subject to the hotel's space and rate availability.*

Check-In: 4pm

Check-Out: 11am



# REGISTRATION

<b>Early Bird:</b>	\$699 (through April 19)
<b>Standard:</b>	\$799 (April 20 - April 30)
<b>Late:</b>	\$899 (May 1 - Conference)
<b>Awards Dinner Guest Pass:</b>	\$100
<b>Full Guest Pass:</b>	\$400

## CANCELLATIONS

If PASBA should be prevented from holding the 2019 Marketing & Technology Conference by reason of any cause beyond its control (such as, but not limited to, damage to buildings, riots, labor disputes, acts of government or acts of God) then PASBA has the right to cancel the Conference with no further liability to attendees other than a refund of registration fees. Registration cancellations are accepted through April 19 for a full refund. Cancellations after this date will receive no refund.



# PASBA BLUEPRINT SERIES

Our Blueprint Series provides additional training to new PASBA members as well as support and best practices for our longtime members.

## BLUEPRINT FOR SUCCESS UNIVERSITY - ALL NEW & PROSPECTIVE PASBA MEMBERS

This is a lecture style session that will teach core PASBA principles. Topics include the following:

- PASBA Overview
- Client Installation
- Second Strategy Session
- PASBA Hiring System
- Incentive Compensation
- PASBA Fee Structure
- Internal Record Keeping/Statistics Necessary to Run a PASBA Practice
- Sales Presentation Ideas
- Marketing Options to Grow Your Practice

## BLUEPRINT MASTERY - OPEN TO ALL MEMBERS

Blueprint Mastery is centered on the PASBA Blueprint for Success manuals. This is a participant-centered workshop created to assist PASBA members to better implement key processes contained in the Blueprint Manuals. Topics to be included are:

- Positioning your **Business** for Change
- Positioning **Yourself** for Change
- Getting the most out of a PASBA Conference
- New Client Procedures
- Timely Production & Standardized Processing

## BLUEPRINT SALES UNIVERSITY

Blueprint Sales University is centered on the PASBA Blueprint for Success Sales and Marketing Manual. The sessions cover proven growth methods in an interactive format including lecture, member participation, and workshop exercises. The instructors are seasoned PASBA members with a long history of success in growing their own firms.

**Note:** New PASBA members are required to attend the Blueprint for Success University and Blueprint Mastery programs before attending Sales University.

# MEET OUR GUEST SPEAKER

## THE TOOLS, PEOPLE, AND OFFERINGS THAT HELPED OUR FIRM GROW 10X

This session will be an interactive discussion with a firm owner who rapidly grew his practice through a process of consistent experimentation. He will give a candid look at the technologies, processes, and solutions that worked for his firm, along with the many that failed!

### ABOUT KENJI

Kenji is the Founder and CEO of [Acuity](#) which builds and maintain financial functions for entrepreneurs and startups. Through Acuity, he's provided thousands of companies with a full range of financial solutions from high-level strategic financial counsel through its fractional CFO practice all the way to virtualized bookkeeping and tax solutions for early stage startups. Kenji's core business mission is to provide scalable financial solutions for entrepreneurs, so that their main focus can be on growing their company.

Kenji is active in financial, business and community organizations. He is a Board Member for The Entrepreneurs Organization, a Founding Venture Partner at NextGen Ventures, and has served on the Xero Partner Advisory Council. He is a CPA in the State of Georgia and a graduate of Wake Forest University, where he earned a bachelor's degree in Accounting. He was recently named as one of The Atlanta Business Chronicle's 40 Under 40, a TIE Top Entrepreneur, Hubdoc's Top 50 Cloud Accountants 2016 - 2018, and Xero's 2018 Rewiring The Global Economy Award.



**KENJI KURAMATO**  
CEO & FOUNDER, ACUITY

## SAVE THE DATE

**NOVEMBER 11 - 14, 2019**  
**PASBA FALL MANAGEMENT CONFERENCE**  
**LIVE! BY LOEWS | ARLINGTON, TX**

Room Rate: \$199

*PASBA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.learningmarket.org](http://www.learningmarket.org). This conference offers 35 credits in the areas of Communications & Marketing, Business Management & Organization, Computer Software & Applications, Accounting.*