AAM Summit

June 7–10, 2015
Walt Disney World
Swan and Dolphin Resort
Orlando, FL

ROOTS OF SUCCESS

IN PARTNERSHIP WITH THE

Save $100! See page 9 for details.
LEAD YOUR FIRM INTO SEASONS OF GROWTH

Advancing new business opportunities while nurturing your firm’s service philosophy — it’s an interplay that requires vision, strategy and technical skills. The elements you need, specific to your firm’s growth, are at the 2015 AAM Summit. Your firm’s core groups will be strengthened by the event’s four dynamic programs, as they address the partnerships that form the roots of success.

New seasons of growth await. Join us.
NOTABLE Speakers

AN INVITATION FROM
Kerry Sullivan-Lechne

Every accounting firm is striving for growth: the expansion of its practice, the evolution of its brand, innovation in client service, and the development of its professionals and culture. How can we best leverage our strengths to foster the kind of long-term success that benefits both our practice and our firms’ clients?

This year’s Association for Accounting Marketing (AAM) Summit will focus on your role in reaching that overall growth goal, while exploring how all of the professional disciplines work together with that same objective in mind. We are excited to be co-locating our summit in conjunction with the AICPA Practitioners Symposium and TECH+ Conference as well as the Association for Accounting Administration National Practice Management Conference. The added value found from bringing together our programs and sharing insights from across the firm will offer attendees a true “one-stop-shop” opportunity for learning and collaboration. After all, together our disciplines form the roots of success for our firms.

In designing this event, our hope is that smaller firms can learn what larger firms are doing in the administration and marketing space, while larger firms can turn this event into a management retreat. With a robust curriculum covering every aspect of firm development and operations, the conference presents a wonderful opportunity to bring team members from every discipline together to collaborate on-site in real time and share information gained from the diverse tracks.

I invite you to review the conference program in the following pages, and discover how the combined strengths of AAM, the AICPA and AAA will support the roots of your success today and in the future.

Kerry Sullivan-Lechner
President
AAM

SUNDAY EVENING

Bert Jacobs
CEO and Chief Optimist, Life Is Good
“The Power of Optimism”

Peter Shankman
CEO, Angel Investor, Entrepreneur, Adventurist, Shankminds Business Masterminds
FEATURED Sessions

- **AAM Keynote** Ain’t No Customer Like a Zombie Customer
- **Pre-conference Workshops**
  - Do You Believe in Magic, or Efficient, Effective Business Development?
  - Marketer 20/20: Evolution of the Accounting Marketer Role
- Content Marketing: Practical Tips to Set Your Firm Apart
- “I’ll Take Technology for $1,000, Alex”: Practical Tech Tips and Tools to Improve Marketing Results
- Measuring Success: ROI and Pipeline Management Tools

TOPICS FOR Everyone in Your Firm

- Ecosystem of M&A (Sessions featured in all four programs)
- Tech Update
- Secrets of Firm Leadership
- Client Loyalty
- The “I” in Diversity & Inclusion

GROUP Discount

Make this event a firm retreat with your established and up-and-coming staff members. Group-rate discounts offer maximum savings if you have multiple registrants.

GROUNDWORK FOR Fun and Adventure

Walt Disney World Swan and Dolphin

You and your family will be just steps from Disney’s Hollywood Studios™ and Epcot® — in the very heart of all the best attractions. Plus, your guest benefits include:

- Complimentary transportation to Disney theme parks and attractions
- Extra Magic Hours
- Advance tee times on Disney golf courses

Save $100! See page 9 for details.
### TECHNOLOGY LEVEL 5

The Technology Level 5 icon can be found in the conference agendas.

### DAY ONE

#### MONDAY June 7

#### At-A-Glance Agenda

**#PSTech #AAMKT #AAAPM**

#### PROGRAM

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<th>Track</th>
<th>A&amp;A</th>
<th>Tax</th>
<th>Firm Management &amp; Vision</th>
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#### DAY TWO

#### MONDAY June 8

**EVENT Features**

- **Interactive Learning**
  - UnConference & Audience Response Systems
  - Take part in these interactive, audience-driven sessions where you can speak up and create a shared experience of opinions on a wide range of subjects. Look for the **IL** icon in the conference agendas.

- **Exhibit Hall**
  - Grab a refreshment and explore the Exhibit Hall’s networking areas, learning labs and pavilions, featuring the latest services and products.

- **Get Social**
  - Join the conversation specific to this conference using: **#PSTech #AAMKT #AAAPM**

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### DAY ONE

- **SUNDAY June 7**
  - Noon—7:00pm Registration Open and Exhibit Hall Set-Up.
  - 1:00—4:00pm Special events to be announced. Check website for complete details.
  - 4:30—5:45pm P101. PCPS Roundtables — Natasha Schamberger, AICPA
  - 6:00—7:15pm K01. Keynote: The Power of Optimism — Bart Jacobs, CEO and Chief Optimist, Life Is Good

### DAY TWO

- **MONDAY June 8**
  - 7:00—8:30am Welcome and Introduction
  - 3:15–4:45pm Networking Break With the Exhibitors
  - 7:00—8:00am Registration Open, Continental Breakfast and Exhibits Display
  - 8:30—9:45am T01. TECH Update — Randy Johnston, Network Management Group Inc./K2 Enterprises
  - 9:45–10:15am Networking Break With the Exhibitors
  - 10:15–11:30am P02. FASB & Revenue Recognition Update — Steve Bodine, EltonLarsonAllen LLP
  - 11:30am–12:30pm Luncheon
  - 12:30–1:45pm P05. Understanding Auditing Standards: A Key to Success — Chuck Landes, AICPA
  - 2:00–3:15pm P08. Putting the Thinking Back in the Audit Process — Ed Karl and Melissa Labant, AICPA
  - 3:15–4:30pm Networking Break With the Exhibitors
  - 4:30–5:00pm P11. ARSC Update: SSARS 21 — Mike Brand, Johnson, Fieglays, Newton & Brand LLP
  - 5:00–6:00pm Networking Reception and Exhibits Display
  - 6:30pm AAA Recognition Dinner and/or AAM-MAA Awards Gala

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<td>7:00-7:50am</td>
<td>P14. Implementing Preparation andCompilation Service</td>
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<td>8:10-9:25am</td>
<td>K02. Keynote: Professional Issues Update — Tommye Barie, Chair, AICPA Board of Directors, Barry Melancon, President and CEO, AICPA</td>
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<td>9:25-9:55am</td>
<td>Networking Break With the Exhibitors</td>
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<td>9:55-11:10am</td>
<td>D04. Production Integration —— Jeff Drew, AICPA</td>
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<td>11:20am-12:35pm</td>
<td>P20. Are Your Staff Just Going Through the Motions on Fraud? — Debra Thompson, Steffen Thomas LLC</td>
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<td>12:35-1:30pm</td>
<td>Luncheon</td>
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<td>1:30-2:45pm</td>
<td>P23. Improving Audit Inquiry Interview Techniques — Al Anderson, ACCOUNtability Plus LLC</td>
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<td>2:55-4:10pm</td>
<td>P26. Peer Review: Effectively Performing Internal Inspection and Monitoring — Jim Breckens, AICPA</td>
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<td>4:40-5:30pm</td>
<td>P29. The New Code of Professional Conduct — Sue Corley, AICPA</td>
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<tr>
<td>5:30-6:30pm</td>
<td>Networking Reception and Exhibits Display</td>
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<td>PCPS/CPA.com Reception by invitation only</td>
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DAY FOUR  
WEDNESDAY June 10

**MANAGEMENT CONFERENCE AICPA TECH+ AND DIGITAL CPA AAM SUMMIT**

**PROGRAM**

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**Six:30-8:00am**  
**Registration Open and Continental Breakfast**

**7:00-7:50am**  
**P32. Audit Workflow Forum — Matt Wilson**

**8:00-9:15am**  
**P35. Improving Supervision Review and Evaluation of the Audit Process — Al Anderson, ACCOUNTAbility Plus LLC; Denise Delahanty, The Gallup Organization**

**9:15-9:30am**  
**Networking Break**

**9:30-10:45am**  
**P38. Delivering Remarkable Client Service During the Audit — Tom Siders, L. Harris Partners LLC**

**10:45-11:15am**  
**Networking Break**

**11:00am-12:15pm**  
**K03. Keynote: Disney’s Approach to Quality Service — Presented by the Disney Institute**

**BY THE PROFESSION For The Profession**

Your conference steering committee has created the perfect “firm retreat” — an event that will help you and your firm define a clear path to success. Seasoned accounting professionals from across the country have created and developed sessions that provide the latest learning tools and technological information to keep you on the cutting edge.

**Committee Members**

**Practitioners**

| William Pirollo | DiSanto Priest & Co., Warwick, RI (Chair) |
| Alan Anderson | ACCOUNTAbility Plus LLC, Minneapolis, MN |
| John Bellitto | Allen & Cook Inc., San Jose, CA |
| Jason Deshayes | Butler & Company, Albuquerque, NM |
| Jina Etienne | AICPA, Washington, DC |
| DeAnn Hill | DeAnn Auman Hill CPA, Baxter Springs, KS |

| Mark Koziel | AICPA, Durham, NC |
| Jody Padar | New Vision CPA Group, Arlington, VA |
| Natasha Schamberger | AICPA, Durham, NC |
| Matthew Wilson | Matthew Wilson, CPA, MSA, CGMA, San Bernardino, CA |

| Catherine Bruder | Doeren Mayhew, Troy, MI |
| Michael Cerami | CPA.com, New York, NY |
| Anne-Marie Laderoute | CPA Canada, Toronto, Ontario |
| Ilesha Mack | AICPA, Durham, NC |
| Samantha Mansfield | AICPA.com, Dexter, MI |
| John Shamash | RSW Accounting + Consulting, Montreal, Quebec |
| Donny Shimamoto | Intraprise TechKnowlogies LLC, Honolulu, HI |
| Marc Staut | CohnReznick, Baltimore, MD |
| Brian Tankersley | K2 Enterprises, Knoxville, TN |
| Steven Ursillo | Sparrow, Johnson, & Ursillo Inc., West Warwick, RI |
| Ann White | BDO USA LLP, Fort Worth, TX (Chair) |
| Bob Biddle | Bowman & Company LLP, Voorhees, NJ |
| Jim Fahey | HBK CPAs & Consultants, Canfield, OH |

| Jane Johnson | Grimbbley Coleman CPA's Inc., Modesto, CA |
| Jeff Antaya | Plante & Moran PLLC, Southfield, MI |
| Janine Zirrith | Wilkin & Guttenplan P.C., East Brunswick, NJ |
| Cheryl Hunt | Carr, Riggs & Ingram, Nashville, TN |
| Shana Karle | Ingenuity Marketing Group LLC, St. Paul, MN (Chair) |
| Kristen Lewis | EisnerAmper LLP, Jenkintown, PA |
| Stephen White | Greenfield/Belser, Washington, DC |
| Jessica Levin | Seven Degrees Communications, Joe Rotella, Delphia Consulting, LLC |

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The American Institute of CPAs is the world’s largest member association representing the accounting profession, with more than 400,000 members in 145 countries, and a history of serving the public interest since 1887. AICPA members represent many areas of practice, including business and industry, public practice, government, education and consulting.

The Association for Accounting Administration is the recognized leader in CPA firm practice management, delivering valuable education and collaboration opportunities for those interested in elevating their practice and strategically growing their firms.

The Association for Accounting Marketing provides resources, education, support and a global network to the accounting marketing profession. Its members represent firms of all sizes and seek to add value to their firms within a rapidly changing competitive environment.

SPECIAL Events
Unrivaled networking. Sharing of ideas inside and outside of the classroom. Opportunities for chance encounters and more formal meet-and-greets form yet another root of success during the conference.

Conference Receptions
Sunday
► Kickoff Reception and Exhibit Hall Opening
Pick up your name badge and get a head start on mingling with the exhibitors. This is a great way to dig into new adventures!

Sunday, Monday, Tuesday
► Networking Receptions
Join us for combined AICPA/AAA/AAM networking receptions to unwind and mingle at the end of each day. All attendees are invited.

Association Events
Sunday
► AAA and PCPS members are invited to participate in our traditional “Breakouts by Firm Size,” providing emerging trends in firm practice management.
► AAM will host a special welcome reception for all first-timers ahead of the opening of the Exhibit Hall. Mingle with other new attendees, and meet seasoned marketers eager to help you maximize your Summit experience.

Monday
► AAA members and designated guests can join a special recognition dinner with the presentation of the Association’s annual ACE Award. Roundtables to enhance the sharing experience will follow Monday’s dinner.
► AAM will once again honor the best of the best in marketing with this year’s AAM Marketing Achievement Awards (AAM-MAAs). Join us for an evening of networking and best practice sharing at the AAM-MAA Awards Gala.

Tuesday
► PCPS members and designated guests can join our special PCPS/CPA.com celebration and continue networking with peers! By invitation only.
► AAM’s networking events are always a highlight of the conference. For an additional cost, you can join in a unique experience in Orlando with your peers.

Wednesday and Thursday
► AAA and PCPS will be hosting the Human Capital Forum following your conference experience. For an additional cost, those with an HR focus can continue sharing.

MEET OUR Conference Partners

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This conference was prepared in accordance with the Joint AICPA/NASBA Statement on Standards for Continuing Professional Education (CPE) Programs, effective on July 1, 2012. The recommended CPE credits are in accordance with these standards; however, your individual state board is the final authority on the acceptance of programs for CPE credit.

Conference Fee
Conference fee includes all sessions, conference materials, continental breakfasts, refreshment breaks, luncheons, a reception and the AAM-MAA Awards Gala.

Group Registration
Registration for two or more individuals at the same time may qualify for group discounts; additional savings may be available for groups of 10 or more. For more information, please call 888.777.7077 (9am–6pm ET). Program Code: PST15-AAM

Cancellation Policy
You may cancel without penalty if written cancellation requests are received by 4/24/15. Due to financial obligations incurred by the AICPA and AAM, a credit voucher less 50% of the registration fee will be issued for written requests received by 5/18/15. No refunds or credits will be issued on cancellation requests received on or after 5/19/15. For further information, call 888.777.7077.

Hotel Information
Contact the hotel directly to obtain their policy on reservations, deposits and cancellations. Rooms will be assigned on a space-available basis only. To receive our special group rates, mention that you will be attending the AAM conference.

Walt Disney World Swan and Dolphin Resort
1500 Epcot Resorts Blvd.
Lake Buena Vista, FL 32830
Hotel Reservations: 800.227.1500
Hotel Room Rate: $189 single/double
Hotel Cutoff Date: 5/7/15

Attendance Options

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<td>Full Conference With <strong>Super Early Bird</strong> Discount (Expires 3/13/15)</td>
<td>$830</td>
<td>$955</td>
<td>$1,255</td>
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<tr>
<td>Full Conference With <strong>Early Bird</strong> Discount (Expires 4/24/15)</td>
<td>$855</td>
<td>$980</td>
<td>$1,280</td>
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<tr>
<td>Full Conference</td>
<td>$930</td>
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PCPS Section Members Save an Additional $125

Online*: accountingmarketing.org  Phone*: 888.777.7077

*Credit card registration only (American Express®, Diners Club®, Discover®, MasterCard® or Visa®)
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in partnership with the Association for Accounting Administration and the American Institute of CPAs

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Super Early Bird Discount Expires 3/13/15

Recommended CPE Up to 24 Credits

Association for Accounting Marketing
c/o AICPA Store/CPA.com
220 Leigh Farm Road
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