

ONLINE  
virtual  
DESIGNED FOR YOUR FIRM

CPAFMA

Accelerator 

for those managing an accounting firm

NOVEMBER 9-10, 2020 | LIVE FROM SARASOTA AND ACROSS THE U.S.

This program is exclusively designed to help participants professionally manage accounting firms of varying sizes. Understanding the challenges firms have faced in 2020, CPAFMA has designed this virtual Accelerator to be affordable and inclusive, providing the opportunity for up to five members of the firm's leadership group to participate for one low price from the convenience of one's office.

[REGISTER HERE](#)

The two-day educational exchange has something for everyone involved in accounting firm management. The live online event includes high-level keynote sessions to facilitated discussions customized to provide information that can be implemented immediately.

# T A K E A W A Y S



Live Q&A and inclusion in a private Connect Community



Facilitated sessions



Discussions led by nationally recognized firm management experts



All participants will receive access to view session recordings on demand



Up to 14.5 hours of CPE and 5 HRCI credits

YOU SHOULD ATTEND

## IF YOU ARE ...

- Responsible for management of an accounting practice.
- Responsible for the quality and profitability of your firm.
- Supervising and/or training staff in an accounting firm.
- Interested in developing a team of outstanding professionals.
- Ready to promote your firm in today's marketplace with expanded services and a desire to strengthen client relationships.
- New to the profession or an experienced firm manager, chief operating officer, human resource director or managing partner
- Ready to deal with uncertainty with confidence.

# AGENDA

TIME	SESSIONS	CPE
<b>MON, Nov 9, 2020</b>		
10:00 a.m. - 10:15 a.m. EST	<b>The Unprecedented Year</b> Bill Reeb, Immediate Past Chair, American Institute of CPAs	15 min
10:15 a.m. - 11:30 a.m. EST	<b>The Unstoppable You</b> Jimmy Page, Co-Author of <i>One Word</i>	75 min
11:30 a.m. - 11:40 a.m. EST	Break	10 min
11:40 a.m. - 1:30 p.m. EST	<b>Strategy, Leadership &amp; Growth Accelerator</b> Bill Sheridan, Maryland Association of CPAs, Kimberly Ellison-Taylor, Oracle and Past Chair, American Institute of CPAs, Rita Keller, Keller Advisors, LLC, Sandra Wiley, Boomer Consulting, and Jennifer Wilson, ConvergenceCoaching	110 min
1:30 p.m. - 2:00 p.m. EST	Grab something to eat and drink	30 min
2:00 p.m. - 3:00 p.m. EST	<b>The Transformation of the Accounting Profession: What You Need to Be Aware of as Firm Manager</b> Michael Horwitz, Executive Director, BDO Alliance, USA	60 min
3:00 p.m. - 3:10 p.m. EST	Break	10 min
3:10 p.m. - 4:10 p.m. EST	<b>Mergers &amp; Acquisitions Accelerator</b> Joe Tarasco, Accountants Advisory Group, LLC and Art Keusel, Keusel Consulting, Inc.	60 min
4:10 p.m. - 4:20 p.m. EST	Break	10 min
4:20 p.m. - 5:10 p.m. EST	<b>The Right Expectations for the Firm Manager in Firms of All Sizes</b> Ira Rosenbloom, Optimum Strategies	50 min
5:10 p.m. - 5:15 p.m. EST	<b>Day I Closing</b> Roman Kepczyk, Right Networks	5 min
<b>TUES, Nov 10, 2020</b>		
9:55 a.m. - 10:00 a.m. EST	<b>Welcome to Day II</b> Bill Reeb, Succession Institute and Roman Kepczyk, Right Networks	5 min
10:00 a.m. - 11:50 a.m. EST	<b>Firm Operations Accelerator</b> Bill Pirolli, DiSanto, Priest & Co. and Vice Chairman, American Institute of CPAs and Joe Tarasco, Accountants Advisory Group, LLC	110 min
11:50 a.m. - 12:20 p.m. EST	Grab something to eat and drink	30 min
12:20 p.m. - 2:10 p.m. EST	<b>Talent &amp; People Accelerator</b> Marcey Rader, Marcey Rader Coaching, Jeremy Wortman, PhD, HRD Initiatives, Jennifer Wilson, ConvergenceCoaching, Rita Keller, Keller Advisors, LLC, and Rachel Anevski, Matters of Management	110 min
2:10 p.m. - 2:20 p.m. EST	Break	10 min
2:20 p.m. - 4:10 p.m. EST	<b>Technology Accelerator</b> Roman Kepczyk, Right Networks and Bill Reeb, Succession Institute	110 min
4:10 p.m. - 4:20 p.m. EST	Break	10 min
4:25 p.m. - 5:40 p.m. EST	<b>Beyond the Pandemic and After the Elections</b> Gene Marks	75 min
5:40 p.m. - 5:45 p.m. EST	<b>Day II Closing</b> Bill Reeb, Succession Institute and Roman Kepczyk, Right Networks	5 min

# FACILITATORS

DEDICATED TO

LEARNING. COLLABORATING. SHARING.



**Bill Reeb, CPA, CITP, CGMA | Succession Institute**

As an award-winning public speaker, Bill lectures throughout the U.S. and Canada to thousands of executives and CPAs each year. In addition, he has been featured on numerous videotaped and live television programs. As an award-winning author, Bill is internationally published with hundreds of articles and columns to his credit. He currently authors a bi-monthly column called "On the Bill-iverse" which is distributed by a number of State CPA Societies as part of their Practice Management e-newsletter. Bill is an active volunteer within the accounting profession, having served in many leadership roles. He is past Chair of the Board of the AICPA, is a current and past member of the Board of Directors and Council, and past Commissioner to the National Accreditation Commission. He also serves as an Advisory Board Member to several organizations, including CPAFMA.



**Roman Kepczyk, CPA, CITP, CGMA, PAFM |  
Right Networks**

As Director of Firm Technology, his primary focus is helping firms throughout North America effectively use information technology and accounting applications by optimizing their tax, audit and administrative production workflows. He has spent the past twenty-four years consulting exclusively with CPA firms and prior to that, ten years as the partner in charge of a firm's Management Advisory Services and Consulting practices. Roman also served as the firm's Administrative partner where he oversaw internal Accounting, Marketing, Human Resources and was responsible for the creation and implementation of the firm's technology plan and budget. Roman has been recognized by every industry publication and serves as an Advisory Board Member to CPAFMA, is on the BDO Alliance Technology Committee, and has served on the Board of Directors of the Arizona Society of CPAs. He also authored "Quantum of Paperless: Partners Guide to CPA Firm Optimization" which outlines 32 key CPA best practices.

# KEYNOTERS



## The Unstoppable You **Jimmy Page**

There isn't a year where creating simplicity in your world and developing a discipline for life means more. "One Word" explains how to simplify your life and firm by focusing on just one word for a year. The simplicity of choosing one word makes it a catalyst for life change. Clutter and complexity lead to procrastination and paralysis while simplicity and focus lead to success and clarity. By authors Dan Britton, Jimmy Page, and Jon Gordon, "One Word That Will Change Your Life" shows you how to cut through to the core of your intention for the next year. It offers an action plan and simple process to discover your word for the year. Jimmy will explain how to be **The Unstoppable You** as he kicks off the Accelerator.

## The Transformation of the Accounting Profession: What You Need to be Aware of as Firm Manager **Michael Horwitz**

As the profession is transforming and dealing with the challenges of 2020, the role of the firm manager is being impacted. Few in the profession have their hand on the pulse of the firm like Michael Horwitz, Executive Director, BDO Alliance, USA. He listens and works with partner groups across the country and understands the dynamics of the changing firm. During this session, he will provide his insights as to what the firm manager needs to do to keep their firm relevant.





# The Right Expectations for the Firm Manager Ira Rosenbloom in Firms of All Sizes

In this facilitated conversation with COE of Optimum Strategies, a niche CPA practice succession and management engineering firm, participants will discover ways that chief operating officers can effectively partner with owners to better manage firm change, evolve the position, support partner transitions, participate in mergers and acquisitions and enhance the perceived value of the role of the firm manager while leading firms through a year where the role of the firm manager has never been more important to the continued success of the culture of the firm.

## Beyond the Pandemic and After the Elections

Join nationally recognized journalist, CPA and business owner Gene Marks for a fast-paced, entertaining and data-filled presentation where he will share with you the thoughts, lessons and actions his audience of more than a half a million business owners, managers and leaders are taking to survive 2020 and thrive in the years to come. Gene will provide an update on all government, state, local grant and lending programs along with the latest and pending legislation for helping businesses overcome the pandemic; a deep dive into the best workplace practices and legislation that smart leaders are implementing to keep their employees productive, happy, healthy and safe; an analysis of the presidential election results; a look forward at current investment opportunities that the recent economic downturn has created for those companies that have the resources to take advantage; and the latest technologies that require review and investment which will ensure further growth in the profession.

## Gene Marks



# ACCELERATORS

Five facilitated sessions designed to break the virtual presentation mold will include nationally recognized consultants from across the country providing their insights and perspectives on the topics that are keeping those managing CPA firms working harder than ever before. Participants will hear directly from the consultants in conversational type format with the ability to ask questions and hear differing viewpoints.

## Strategy, Leadership & Growth

This 110-minute session will feature Bill Sheridan, CAE, Electronic Communications Manager and Editor, Maryland Association of CPAs, Kimberly Ellison-Taylor, CPA, CGMA, Executive Director, Finance Thought Leadership, ERP EPM Product Marketing, Oracle and Past Chair, American Institute of CPAs, Rita Keller, President, Keller Advisors, LLC, Sandra Wiley, President, Boomer Consulting, and Jennifer Wilson, Partner and Co-Founder, ConvergenceCoaching.

Topics within the strategy, leadership and growth area that are likely to be covered in this fast paced and ever evolving session include remote work including policies, recruiting, onboarding, culture enhancement and establishment, KPIs, lease renewals, impact on the future of the firm; the pandemic and it's impact on the firm's strategic plan, leadership develop and future growth; workflow; staffing; relevancy; succession and the firm's new normal.

## Mergers & Acquisitions

This 60-minute session will feature Joe Tarasco, Chief Executive Officer, Accountants Advisory Group, LLC and Art Kuesel, CPA, CEO, Kuesel Consulting, Inc.

Topics within the mergers and acquisitions area that will be covered include mergers and acquisitions in the current and near term environment and expanding and growing the role of the firm manager in M&A.

## Technology

This 110-minute session will be intense with Roman Kepczyk, CPA.CITP, CGMA, PAFM, Director of Firm Technology Strategy at Right Networks discussing the most most relevant technology issues of 2020 with co-facilitator, Bill Reeb, CPA.CITP, CGMA, Chief Executive Officer, Succession Institute while fielding questions from participants.

For years firm managers have heard about the need to be paperless, to understand cybersecurity, to embrace remote work, not to ignore work flow challenges, and to understand that technology touches every aspect of your day and it's critical that you are ahead of it at all times. Roman has been that voice. For those who have been loyal listeners, you've probably faired better since March of 2020 than many others. This session has been exclusively designed for CPAFMA's Accelerator and promises to continue the tradition of providing those managing accounting firms with technology information delivered in a manner that is implementable and solutions-oriented.

## Firm Operations

This 110-minute session will feature Bill Pirolli, CPA/GFF/PFS, CGMA, Partner, DiSanto, Priest & Co. and Vice Chairman, American Institute of Certified Public Accountants and Joe Tarasco, Chief Executive Officer, Accountants Advisory Group, LLC.

Topics within the firm operations area that are likely to be covered include profitability; accountability during and after a pandemic; budgeting amid a pandemic; collections now and when businesses fail; what happens when PPP funds run out; cash flow projections; new tools to predict what really matters; regulations and compliance and ROI.

## Talent & People

This 110-minute session will feature Marcey Rader, Author, Speaker, Coach, Marcey Rader Coaching, LLC, Jeremy Wortman, PhD, President, HRD Initiatives, LLC, Rachel Anevski, Founder and Chief Executive Officer, Matters of Management, Rita Keller, President, Keller Advisors, LLC, and Jennifer Wilson, Partner and Co-Founder, ConvergenceCoaching.

Topics within the talent and people area that are likely to be covered in this fast paced and ever evolving session include recruiting in a new environment; training and development in a remote development; mentorship and coaching remotely; building culture and camaraderie; bonus structures; and changing evaluations to fit today..

# CPAFMA DETAILS Accelerator

## DATES

**November 9, 2020**

10:00 AM - 5:15 PM EST

**November 10, 2020**

9:55 AM - 5:45 PM EST

Note that all times are Eastern Standard Time.

## ONLINE EVENT CONFIRMATIONS/LOG-INS

CPAFMA's Accelerator will be live streamed from Sarasota and many locations throughout the United States. Log-in details will be distributed to all registrants prior to the event. Registrants will be required to have an Internet connection and a device (computer, laptop, tablet or smartphone) to access the event live.

## CANCELLATION

Refunds, less a \$50 processing fee, are available until 11:59 p.m. Eastern, November 1, 2020. Simply email [info@cpafma.org](mailto:info@cpafma.org). Starting November 2, 2020, refunds will no longer be available. All registrations are transferrable at any time. For more information regarding refund, complaint and/or program cancellation policies, contact CPAFMA at (937) 222-0030.

## ACCESSIBILITY

If you are visually or hearing impaired contact [info@cpafma.org](mailto:info@cpafma.org) for support.

## PROFESSIONAL DEVELOPMENT

**Course Level:** All Sessions are Basic

**Field of Study:** Personal Development (1.5); Business Management & Organization (7.0); Finance (2.0); Personnel/Human Resources (2.0); and Information Technology (2.0)

**Credit Hours:** Participants can earn up to 14.5 hours

**Prerequisites and Advanced Preparation:** None

**Delivery Method:** Group Live

CPA Firm Management Association is registered with the National Association of State Board of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have the 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.nasbaregistry.org](http://www.nasbaregistry.org).

## COST

This live streamed event is priced below. All sessions will be recorded and registrants will be provided with access to view recordings on demand in addition to the live access. PAFMs receive a \$100 discount on all registration fees.

**Firm Registration Fee - \$895**

Up to five attendees from the same firm for full participation for the two-day event.

**Daily Registration Fee - \$495**

One attendee for full participation on either Monday or Tuesday.

**Non-Member Registration Fee - \$1495**

One attendee for full participation for two-day event.

**Additional Registrant Fee - \$50**

Those over five under Firm Registration or over one under the Non-Member Registration.

click here for

**ONLINE** registration

**QUESTIONS: CPA Firm Management Association**

(937) 222-0030

[info@cpafma.org](mailto:info@cpafma.org) | [cpafma.org](http://cpafma.org)