

# 2015 NATIONAL TRAINING MEETING

SEPTEMBER 17-18  
MILWAUKEE, WISCONSIN



## REGISTRATION

### Meeting Registration Fee

\$125/person\* through Aug. 31

### Late Meeting Registration Fee

\$150/person\* beginning Sept. 1

CPE Credit: \$25/person

Transportation to Office Visits & Baseball Game: \$35/person

Milwaukee Brewers vs St. Louis Cardinals Game Ticket in reserved area, includes dinner: \$90/person

\* Thursday night event and transportation for Office Visit and event are not included in registration fee.

Cancellations after Sept. 1 will not be refunded.



THE OFFICE VISIT is a key component to this meeting. Allowing your staff to see how other offices successfully operate creates opportunities for them to improve their daily work routines. This year, we are excited to have organized a visit to the office of PASBA members **Ed Hastreiter, Tim Nolan & Jerry Sutkiewicz.**

This meeting is directed toward bookkeepers, supervisors and owners of PASBA member accounting firms who want to learn not only the basics of bookkeeping and supervisor training, but also best practices of successful offices. All participants are encouraged to openly share information about the daily management and marketing in their practices during all sessions.

### NEW TO PASBA

Participants are expected to have a working knowledge of bookkeeping procedures to participate in this PASBA basics session. This session includes tips on production, client reporting, and overall PASBA processes. There are no prerequisites for attendance.

### ADVANCED BOOKKEEPER

Sessions include: What is My Job Description?, Using the Client Accounting Manual, Year-End Processing, How to Review a Financial Statement/Red Flags. In addition, all Advanced Bookkeepers will attend a Mock Bookkeeper Meeting.

### SUPERVISOR

Sessions include: What is My Job Description?, Using the Client Accounting Manual, Year-Round Tax Planning/Tax Planning Meetings with Clients, Moderating Bookkeeper Production. In addition, all Supervisors will attend a Mock Bookkeeper Meeting.

### TECHNOLOGY TRACK – NEW!

Sessions include: Using Screencasting for Training & Client Communication, Using Contact Management Software Effectively, Using QB to Process Accounts, Importing 3rd Party Items to Accounting Software.

### OWNERS' MEETING

PASBA members are invited to participate in discussions about PASBA best practices, marketing, and current technologies with other owners of PASBA practices. This meeting is viewed as an Open Roundtable Discussion.

### QUESTIONS?

Please contact Jordan Bennett in the PASBA Central Office.  
E-MAIL [jbennett@dc-kansascity.com](mailto:jbennett@dc-kansascity.com) | PH 866.296.0001

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). Delivery method for these sessions is Group Live. Conference participants can earn up to 6 credits in the areas of Accounting, Business Management & Organization, Computer Science.



## AGENDA

### THURSDAY, SEPTEMBER 17

1:00 pm – 5:30 pm

Office Visit Times subject to change.

Arrival at Friday's Front Row in Miller Park by 6:00 pm

7:10 pm

Milwaukee Brewers vs St. Louis Cardinals

### FRIDAY, SEPTEMBER 18

All meetings are on the following schedule:

8:00 am – 9:00 am Breakfast

9:00 am – 11:45 am Meeting

11:45 am – 12:45 pm Lunch

12:45 pm – 5:00 pm Meeting



-VS-



SEE TWO OF MLB'S TOP TEAMS FACE EACH OTHER IN AN EXCITING SHOWDOWN FROM THE FRIDAY'S FRONT ROW SECTION IN LEFT FIELD.

### HILTON MILWAUKEE CITY CENTER

509 W. Wisconsin Ave | Milwaukee, WI | 53203

**CLICK HERE FOR ONLINE RESERVATIONS**

The hotel is a convenient 15 minute drive from the Milwaukee International Airport.

GROUP RATE \$125/night

HOTEL CUTOFF August 19, 2015

The group rate is guaranteed until August 19, 2015, unless the room block fills prior to that date. Rooms and/or modifications requested after the deadline of August 19, 2015 (or after the block has filled) will be subject to the hotel's space and rate availability.