

AAA 2003 National Symposium

Wyndham Montreal
Quebec, Canada



June 25-27, 2003

A program designed exclusively for those professionals managing accounting practices.

National Symposium

The symposium for professionals managing accounting practices

The Association for Accounting Administration invites you and others from your firm to attend its 2003 National Symposium. Again this year, the event has been exclusively designed to help participants professionally manage accounting practices of varying sizes.

Every level of the profession is catered to

The symposium has something for everyone involved in accounting administration. The event includes sessions that range from the beginner to the advanced levels. From the high-level technical sessions to the smaller breakout sessions geared to specific problem-solving and informal gatherings designed to facilitate networking and information exchange, the symposium has sessions for accounting administrators with one year of experience to those with over 30 years.

This year participants will be able to follow the maple leaf for sessions designed for those new to the management of accounting practices.

The overall program is designed to enhance the skills of even the most experienced administrator through a wide variety of top-notch and timely sessions led by professionals and experts from around the country.

Symposium objectives

The educational program has been designed to address several major objectives and meet certain goals:

- To learn more about the playing field of today;

- To help everyone get along;
- To take the high road when it comes to ethics;
- To get what you want with what you've got and how to raise the bar
- To learn to brand your career and about career path management;
- To learn more about partner performance management and how to apply sustainable performance strategies;
- To work in the digital age and manage beyond numbers;

That's not all . . .

The AAA National Symposium also features the A.C.E. Award, the profession's most coveted award given for achievement, commitment to the profession and excellence. This award is co-sponsored by *CPA Personnel Report* and *CPA Partner Report*. The association's annual salary and benefit survey will be conducted just prior to the event with results distributed to all participants in Montreal. The symposium will again feature forums by firm size. These popular forums allow participants to discover issues other firms their size have encountered.

In the past, the symposium has attracted administrators, partners, human resource managers, computer and network managers and department heads representing firms with 8 to 800 employees with an average firm size of 45. Whether you are new to the profession or someone with a great deal of experience, you will leave the symposium with skills you never dreamed possible, ones that will help you and your firm prosper. The 2003 Symposium promises to feature even more 'how-to' sessions concentrating on solutions for everyday situations.



Symposium Agenda

Times are subject to change.

Wednesday, June 25, 2003

- 7:30 a.m.–Noon CPA Firm Association Meetings
- 8:00 a.m.–10:00 a.m. AAA National Board of Directors Meeting
- 11:00 a.m.–5:00 p.m. Registration with the Vendors
- 12:00 p.m.–12:30 p.m.  **First Timer's Forum**
- 1:00 p.m.–1:15 p.m. **Opening/Welcome/Salary Survey Review**
- 1:15 p.m.–2:45 p.m. **Heard on the Street – Observations from The Playing Field**
By Allan Koltin of Practice Development Institute
- 2:45 p.m.–3:00 p.m. Refreshment Break with the Vendors
- 3:00 p.m.–4:15 p.m. **BREAKOUT SESSIONS BY FIRM SIZE**
(A) \$0-\$2 Million in Fees
(B) \$2-\$4 Million in Fees
(C) \$4-\$8 Million in Fees
(D) \$8 Up Million in Fees
- 4:30 p.m.–5:30 p.m. **Why Can't Everybody Just Get Along**
By Christine Holton-Cashen of Christine Holton-Cashen
- 6:30 p.m.–8:00 p.m. Reception at Musee d'Art Contemporain de Montreal – Sculpture Garden
In conjunction with the American Woman's Society of Certified Public Accountants
- Evening On Your Own for Dinner

Thursday, June 26, 2003

- 6:15 a.m. Power Walk Led by InfoTech Partners North America
- 7:00 a.m.–5:00 p.m. Registration with the Vendors
- 7:30 a.m.–8:45 a.m.  **RISE & SHINE BREAKFASTS**
(E) Practice Management 101 – PART I
By Rita Keller of Brady Ware & Schoenfeld
(F) Practice Management 401
By Allan Koltin of Practice Development Institute
- 9:00 a.m.–10:30 a.m. **Get What You Want With What You've Got**
By Christine Holton-Cashen of Christine Holton-Cashen
- 10:30 a.m.–10:45 a.m. Refreshment Break with the Vendors
- 10:45 a.m.–12:15 p.m.  **BREAKOUT SESSIONS**
(G) **Your Ticket to the Future: Branding Your Career**
By Cory Dillon of Right Management Consultants
(H) **Partner Performance Management**
By Todd MacDonald of MacDonald Business Development
(I) **Applying "Sustainable Performance Strategies"**
(repeated at 1:30 p.m.)
By Michael McDowell of McCrory & McDowell, LLC
- 12:15 p.m.–1:30 p.m. Luncheon
- 1:30 p.m.–3:00 p.m.  **BREAKOUT SESSIONS**
(J) **First Class: Coaching Your "A" Players**
By Cory Dillon of Right Management Consultants

(K) Firm Strategy Buy-In

By Todd MacDonald of MacDonald Business Development

(L) Applying “Sustainable Performance Strategies”

By Michael McDowell of McCrory & McDowell, LLC

3:00 p.m.–3:30 p.m.

Refreshment Break with the Vendors

3:30 p.m.–5:00 p.m.

Career Path Management

By Todd MacDonald of MacDonald Business Development

7:00 p.m.–10:00 p.m.

AAA Dinner Party

Awarding of the A.C.E. Award

Friday, June 27, 2003

7:00 a.m.–5:00 p.m.

Registration with the Vendors

7:30 a.m.–8:45 a.m.



RISE & SHINE BREAKFASTS

(M) Practice Management 101 – PART II

By Rita Keller of Brady Ware & Schoenfeld

(N) Raising the Bar Panel

Moderated by: Don Scholl of D.B. Scholl, Inc.

Mary Ellen Meador of Kemper CPA Group

John Jackson of Battelle & Battelle

Nigel Jacobs of Taylor Leibow LLP, CAs

Kathy Anthony of O’Sullivan Creel

9:00 a.m.–10:30 a.m.

Taking the High Road: How to Succeed Ethically When Others Bend the Rules

By Frank Bucaro, Frank C. Bucaro & Associates

10:30 a.m.–10:45 a.m.

Refreshment Break with the Vendors

10:45 a.m.–12:15 p.m.

BREAKOUT SESSIONS

(O) Attitude: The Key to Your Bottom Line

By Frank Bucaro of Frank C. Bucaro & Associates

(P) Creating a Learning Firm (repeated at 1:15 p.m.)

By Richard Brehler of Plante Moran



(Q) The Foundation for Winning: When the Rules Keep Changing

By Linda Talley of Leadership University

12:10 p.m.–1:15 p.m.

L1 – Networking Luncheon

L2 – Chapter Leadership Forum Luncheon

Led by Dawn Hanna Bell of Wright Griffin Davis & Co.

1:15 p.m.–2:45 p.m.

BREAKOUT SESSIONS

(R) Creating a Learning Firm

By Richard Brehler of Plante Moran



(S) How to Keep the Stars on Your Staff: Employee Retention Strategies

By Linda Talley of Leadership University

(T) Managing Beyond the Numbers

By Debbie Sessions of Porter Keadle Moore

2:45 p.m.–3:15 p.m.

Refreshment Break


3:15 p.m.–4:45 p.m.

The Digital Advantage

By Roman Kepczyk of InfoTech Partners North America

4:45 p.m.

Symposium Closing

Follow the  for sessions specifically for those new to the management of accounting practices.

Some of the symposium's . . .

Featured Speakers and Sessions

In addition to the customary management, marketing, human resource, personal development and technology topics, concurrent sessions will be presented by recognized experts in their fields and cover such timely topics as listed below.

First Timer's Forum

By Virginia Lowery of Illinois Agricultural Auditing Association and Rita Keller of Brady Ware & Schoenfeld

Spend thirty minutes learning the ins and outs of the AAA National Symposium. Veteran attendees Virginia Lowery and Rita Keller will take a fresh approach to adding value to the annual symposium while providing tips to receive the maximum return on your personal and firm investment.

Heard on the Street – Observations from the Playing Field: State of the Accounting Industry Address

By Allan Koltin of Practice Development Institute
www.pdiglobal.com

This session is designed to give both practitioners and professional management insight into:

- The factors driving change (and opportunity) within our profession
- The different life cycles of CPA firms and the challenges they face
- The future roles and responsibilities of partners
- How (and why) partner compensation methods have to change
- Products and services of the future
- The continuing evolution of the managing partner role/professional management

- The impact of mergers and acquisitions/strategic alliances on CPA firm growth
 - Why top talent and profitability are intertwined
 - The impact of Andersen/Enron and Sarbane-Oxley on our profession
- A nationally recognized speaker, author and consultant, Allan has appeared on television networks such as CNN, Headline News, WGN and Fox. He has been quoted in publications such as *USA Today*, *The Wall Street Journal*, *The Washington Post*, and *The Chicago Tribune*. Allan is the author of two books for professional services firms: *Firm Merger Strategies That Work* and *CPAs That Sell*. He also edited the AICPA's new book, *Marketing A Consulting Niche - Best Practices of Top Performing Firms*.

In both 2000 and 2001 Allan was voted by *Accounting Today* as one of the most influential people in the profession. Previously he was recognized by the Illinois CPA Society with the Distinguished Service Award for outstanding service and commitment to the profession.

Breakouts by Firm Size

Participants will break out into four groups by firm size (determined by firm annual fees). Each group will be led by a seasoned administrator with professional management experience in an accounting firm of that particular

size. Issues such as marketing, human resource management, facilities management, technology, and practice development will be discussed but the sky is the limit for topics. Agendas for the various groups will be set prior to the Symposium by the participants themselves.

Why Can't Everybody Just Get Along?

*By Christine Holton-Cashen of
Christine Holton-Cashen
www.adynamicspeaker.com*

Are you plagued by “difficult” people? Learn the techniques to identify, understand and cope with confrontations and develop the confidence you need to resolve difficult issues. Learn the secret of saying “no” without using the word and create the outcomes you want. Christine will help you approach conflict creatively by outlining tactics to keep your cool, defuse situations and blow off steam before you boil.

Christine is an award-winning and highly recognized speaker who has presented to thousands throughout the United States, Canada, Australia and South Africa. Drawing from her background as a radio personality, actor, and educator, Christine provides an interactive and inspiring presentation and leaves her audiences spellbound. She is a member of the National Speakers Association and holds a Bachelors Degree in Communications and a Masters Degree in Adult Education.

Get What You Want With What You've Got!

*By Christine Holton-Cashen of
Christine Holton-Cashen
www.adynamicspeaker.com*

This program gives you the tools to get the absolute best with what you've got! We are all given what we need to succeed and Christine will help you take those skills to the next level.

Communicate with effectiveness, have more energy, utilize your time to the fullest and tap into your creative potential. Get what you want both personally and professionally ~ you deserve it!

Your Ticket to the Future: Branding Your Career

*By Cory Dillon of Right Management Consultants
www.rmcooki.com*

What's your ticket to the future? Branding. This session will answer questions such as: What is branding? What's your AAA Career Brand? What questions should you be asking yourself about your current and future professional identity? And how will your answers impact others' perception of you as a key player?

Cory is Vice President/Director of Organizational Consulting for Right Management Consultants, the company that wrote the book on 360-degree feedback (really!). Cory has over 25 years of experience in individual development and organizational performance providing strategic and tactical consulting to executives, managers, supervisors, board-level teams and front-line employees in public, private, for-profit, and non-profit organizations.

Partner Performance Management

By Todd MacDonald of MacDonald Business Development

This session will explain how collections, premiums, client service, consulting orientation, sales training, adding value, client satisfaction, time management, dealing with difficult clients, client ranking, cross-selling, budgeting, lead generation, follow-up, training, motivation, and goals and objectives all converge into a

There's more . . .

performance management program. Mr. MacDonald will also define the role of the marketing person, managing partner, practice group leader and firm administrator in relation to the above and how to maximize the performance of this role.

Applying “Sustainable Performance Strategies”

By Michael McDowell of McCrory & McDowell, LLC
www.mccmcd.com

Over the past several years, the process that we had come to recognize as strategic planning has undergone extensive review/modernization. Businesses in all industries have revisited “Balance Scorecarding”, Activity Based Management Techniques and even the theories of the recent best seller “Six Sigma”, as alternatives to improve performance and achieve objectives in today’s increasingly competitive business environment. SPS has emerged as an effective assembly of the best characteristics of each of these models. SPS was developed from, and is supported by, the AICPA sponsored strategic planning process, Performance View Plus.

Many firms have strategic plans, management reports and day-to-day decision making criteria that do not, collectively, support the actual goals of the firm. The SPS process identifies the specific factors that are, or will be, critical to the success of the organization. These critical success factors must relate to the overarching goals of the firm. As these critical success factors are identified, the Sustainable Performance Strategies process drives the firm to develop a practical measurement system that can provide real time feedback about key activities surrounding these success factors (how much progress is being made). Armed with a better understanding of the important goals and objectives of the firm, and the

drivers critical to successfully achieving those objectives, management will make better, more consistent, less arbitrary management decisions.

Mr. McDowell is co-founding partner of McCrory & McDowell LLC. The firm has over 50 professionals with offices in Pittsburgh. A seasoned facilitator, Mr. McDowell has over 20 years of experience helping companies reach their financial and operational goals. Mike has, on a contract basis, fulfilled the responsibilities of Chief Operating Officer for some of the largest multi-specialty physician networks in the United States that employ hundreds of physicians with dozens of care delivery locations generating over \$500 million in annual charges.

Mike has worked extensively in the corporate merger, acquisition and sales area. His services have ranged from advisor, to strategist, to lead negotiator. His professional experiences have encompassed a wide range of industries, working with both closely-held and widely owned companies.

First Class: Coaching Your “A” Players

By Cory Dillon of Right Management Consultants
www.rmcoke.com

Who are the “A” players in your organization? What are their unique needs? How will you keep them engaged with your organization? What will it cost if they leave? How do you coach them—either to advance or to maintain their high performance? In this interactive session, Cory will share Right Management Consultants comprehensive research on satisfying “A” players along with tips for coaching them effectively.

Firm Strategy Buy-In

By Todd MacDonald of MacDonald Business Development

This session will show participants who to create a firm strategy buy-in and get

professionals to embrace change concepts. Most professionals are self-centered and resistant to management and change. Mr. MacDonald will explain how the vertical silos that have been built up in your practice can be replaced with a horizontal management program that gets everyone's efforts harmonized.

Career Path Management

By Todd MacDonald of MacDonald Business Development

This session will discuss career path management for today's accounting firm administrator. Mr. MacDonald will discuss ways professional administrators can move up through the different stages of career development (i.e. office manager, firm administrator, COO, CEO, principal/partner, consultant) while providing knowledge to continually strengthen the firm.

Taking the High Road: How to Succeed Ethically When Others Bend the Rules

By Frank Bucaro of Frank C. Bucaro & Associates
www.frankbucaro.com

Problems and consequences attributed to poor ethical decisions can arise when ethical behavior is not defined, understood, or demonstrated.

Emphasizing ethics can help to foster an environment where:

- Ethical behavior is valued.
- Ethical behavior is considered the norm.
- Solid ethical decisions help to contribute to long-term success.

This program features easy to understand definitions of ethics, guidelines for tackling difficult decisions, practical examples, and a generous amount of humor – the result – an upbeat look at a key factor in long-term success. This session is based on Mr. Bucaro's book of the same title.

In 1986 Frank Bucaro traded in his chalk and eraser for a microphone. He

enjoyed 18 years in the classroom as an instructor of moral theology. Against the backdrop of almost daily media accounts of compromised ethics throughout the United States, Frank decided on a career change. He wanted to find a way to shed additional light on the subject of ethics and values.

The switch from the classroom, to the boardroom, came when businesses, associations and educational organizations began requesting his programs on ethics and values. He is a business owner, speaker and author of the book, [Taking the High Road: How to Succeed Ethically When Others Bend the Rules](#). He works with organizations that want to integrate ethical standards of excellence with solid business practices.

Attitude: The Key to Your Bottom Line

By Frank Bucaro of Frank C. Bucaro & Associates
www.frankbucaro.com

This session will be entertaining and insightful as it focuses on three basics for relationship building that can provide inspiration for personal and business success.

- Change! A problem or opportunity?
- You can't give what you don't have. So how do you influence co-workers, employees, and associates?
- "Repetition is the mother of learning." Put new skills to work for greater effectiveness.

Combining Frank's unique style of rich content, humor, and easy to adapt ideas, this program will explore the challenge that change presents in today's competitive marketplace.

There's more . . .

Creating a Learning Firm: A Report From the Plante & Moran Trenches

By Richard Brehler of Plante Moran
www.plantemoran.com

Learning is the result of any interaction, formal or informal, that enhances an individual's ability to perform a job, and/or prepares an individual for additional responsibility and/or growth, development and advancement. It has little to do with CPE.

In the next century, learning will become the new currency of client service, and how we differentiate our firm in the marketplace. The successful firm of the future will be the one that learns how to resist the CPE compliance paradigm and learns to plan and manage all the formal and informal mechanisms that create learning.

Learning from our clients is a commitment to improvement. Learning with our clients is a commitment to the relationship. Learning for our clients is a commitment to always be a value-added service provider.

Richard Brehler is the Training and Education Director (TED) for Plante & Moran, LLP, a CPA and Management Consulting Services firm with over 1300 staff in 15 offices in Michigan and Ohio. Prior to joining the firm in 1996, Richard was with First Chicago - NBD's First Development Center, a corporate training and development function within Human Resources. As P&M's first TED, Richard was charged with re-engineering the firm's staff orientation and core training curricula as well as establishing a consistent firm-wide learning methodology. He implemented workstation-delivered training and created a networked online resource designed to support practice staff who design and deliver the majority of the firm's classroom training.

More recently, he has been working with the firm's industry and service group leaders to develop practice-

specific curricula that will provide competency-based development strategies to support the practices' business goals. The firm has also begun implementing more formal partner development processes, including a 360 degree process, individual development plans, and use of such nationally recognized leadership development programs as the Center for Creative Leadership and Harvard Business School's Leadership of Professional Services Firms.

In addition to making *Fortune Magazine's Top 100 Companies in America To Work For* list three years running (in the Top 10 in 2002), Plante and Moran was named to *Training Magazine's* 2001 and 2002 lists of the *Top 100 Training Organizations in America*.

The Foundation for Winning: When the Rules Keep Changing

By Linda Talley of Leadership University
www.lindatalley.com

In today's changing business and economy, more focus is being put on "losses" rather than "wins!" Wins occur when you are able to take responsibility for your life and generate options and choices that will support you in achieving them. You know the rules for winning the game called business yet it doesn't seem to work because "they" keep changing the rules. The rules will continue to change. Why aren't you winning though? Because you don't have the glue to bring it all together and create harmony, melody and balance! This program gives you the right glue, the ingredients of the glue which energizes you to take action and bring your team together to create the business results you want! If you're trying to build a team, this isn't the place to begin! When a person knows how to create wins for him/herself, think about how much further they can go

when on a team! They stop blaming and take action!

This session will teach self-motivating skills and internalize the key concepts for moving ahead in life and business, even during a sluggish and/or changing economy. Ms. Talley will provide key insights for implementing action steps which lead to personal excellence and will teach participants how to reframe the difficult situations in their lives and businesses in order to achieve what they want.

Linda Talley, a change and growth expert, is the recognized authority on how to use words and language to create the results you want in your business and personal life. Author of [The Daily Win](#), [Business Finesse: Dealing With Sticky Situations in the Workplace for Managers](#) and [Business Finesse: How to Say the Right Thing at the Right Time](#), Linda is a creative thinker in the areas of customer service, culture change, team relationships and communication. She is the president of Leadership University, an executive development firm located in Houston, Texas. Leadership University offers a wide range of customized, thought-provoking keynotes and “how-to” seminars to business and association audiences across the country.

She has a unique way of taking timely and complex issues and presenting them so people can listen to them, hear them, understand them and integrate them.

How to Keep the Stars on Your Staff: Employee Retention Strategies

By Linda Talley of Leadership University
www.lindatalley.com

What really makes you happy? What do you love to do? What do you need from others? If you think you are any different from your staff, guess again! We all want the same thing: to be appreciated, to have value, to

receive recognition, to be challenged to be who we really are! With this program, you can begin with yourself and then take the lesson to your staff. This session will offer a four-step action plan to establish and achieve your definition of success, which impacts your business and staff. The premise is that there are many ways to reach an end, some better than others. This focused, dedicated and disciplined process provides immediate and practical help to guide anyone toward higher levels of accomplishments because you know how you feel and you know how to create in a much different way. Participants will receive methods to create better relationships with yourself first and others second, how to self-motivate yourself and get really excited, how to become an innovator and then create an innovative organization.

Conscious, focused work is much more dependable than luck in motivating and challenging staff to grow and achieve goals within your firm. When you know who you are and what you stand for, you can instill this same critical information in your staff. From this session, participants will learn about the results: loyalty, growth, achievement, balance and harmony in the workplace.

Managing Beyond the Numbers

By Debbie Sessions of Porter Keadle Moore
www.pkm.com

There are plenty of numbers in all CPA firms – from number of people, to chargeable hours, to work in process, etc. Financial management, cash flow, line of credit, collections, payroll are numbers that are an integral part of our lives as administrators. But there is more to managing the financial health of a firm than just numbers. Your firm's

There's more . . .

numbers and how you use them to motivate and challenge your staff is one of the most important tasks of firm administrators. This session will include all of these numbers and how to best utilize them from preparing reports and analyses to communicating their impact to staff.

Debbie is an honor graduate of Mercer University in Atlanta and prior to joining the firm in 1983, was associated with a national insurance company. Until July of 1988, Debbie was an audit supervisor, with particular areas of expertise being agribusiness and food service. In July 1988, she accepted the position of firm administrator and is responsible for coordinating the financial, personnel and administrative aspects of the firm. Debbie is a Project Business consultant for Junior Achievement, and a frequent speaker for Georgia Tech's FutureScape in the area of accounting careers. She is also a member of the AICPA, Georgia Society of CPAs, past president of the Georgia Affiliate of American Women's Society of CPAs, and a national board member of the Association for Accounting Administration.

The Digital Advantage

By Roman Kepczyk of InfoTech Partners North America
www.itpna.com

This session will explore the tools and technologies that comprise today's state of the art CPA firm. It will offer a unique look at the tech gadgets that will shape our future from the viewpoint of one of the accounting industry's leading technology consultants. Be prepared to learn how to transition your firm successfully to a digital environment, manage your knowledge more effectively in a "less paper" world, and access firm resources at your fingertips from any place, at any time. This session will also discuss how to maximize your technology investment, as well as

avoid the single biggest mistake CPA firms make in regards to their technology utilization.

Roman H. Kepczyk, CPA is president of InfoTech Partners North America, Inc. and the lead technology management strategist for the firm. Roman carries over 16 years of accounting firm experience, highlighted by 10 years with the CPA firm of Henry & Horne, where he was the partner in charge of the firm's Management Advisory Services and Microcomputer 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 was listed as one of *Accounting Today's* Top 100 Most Influential People within the Accounting Industry in their year 2000, 2001, and 2002 listings. He is currently the Chairman of the AICPA's IT Executive Committee, has served on the AICPA Group of 100, AICPA Best Practices Task Force and is one of the charter Certified Information Technology Professionals (CITP) that the AICPA has designated. Additionally, he was named a Technology Pathfinder by the AICPA Vision Project, and Chairs the Task Force to select the AICPA's Top Technology Issues list. He also served as a member of the AICPA's E-Business Task Force and a prior member of the Information Technology Practices Subcommittee where he analyzed the impacts of technology on the accounting profession.

Attendees will rise early for education . . .

Rise & Shine Sessions

Practice Management 101

By Rita Keller of Brady Ware & Schoenfeld-- www.bradyware.com

This two part session is designed for the professional manager looking for the basics of CPA firm administration. Whether you are new to the profession, have changed industries or simply need a refresher or renewed sense of enthusiasm, this is the Rise and Shine Breakfast for you. Rita is one of the most sought after administrative coaches in the country and will help participants grow and develop in their respective roles.

Practice Management 401

By Allan Koltin, Practice Development Institute -- www.pdiglobal.com

This open session is geared primarily towards directors of administration, COOs, administrative and managing partners and is designed to allow participants an open exchange of questions for discussion. The session

will provide participants an opportunity to share their questions and concerns with Mr. Koltin, who will draw on best practices from similarly sized firms with whom he has consulted around the country.

Raising the Bar Panel

Moderator:

Don Scholl of D.B. Scholl, Inc.

Panelists:

John Jackson, Battelle & Battelle
Mary Ellen Meador, Kemper CPA Group
Nigel Jacobs, Taylor Leibow LLP
Kathy Anthony, O'Sullivan Creel, LLP

This panel discussion will take place during breakfast on Friday and will be organized as an open forum for those desiring to "raise the bar" within their firms or on their personal career development paths. All four panel members are partners, principals or directors of operation within their respective firms and will be able to provide personal insight and experience to all areas of accounting firm management.

M ontreal, Quebec

Montréal is truly an experience: old world charm, French joie de vivre and a modern style all its own. While in Montreal, let yourself be transported into the very heart of the Montréal experience and plan to stay for a few days to participate in the Festival of International de Jazz de Montreal, the largest jazz festival in the world!

Sites of Interest - In Downtown and Old Town Montreal alone, there are hundreds of sites of interest around the symposium hotel. More than two dozen of Canada's most coveted attractions and a hundred restaurants lie within walking distance of the hotel.

Visit the Montreal Tourisme Bureau for more information regarding any of Montreal's attractions. Also visit the Details section of this brochure and the AAA website for additional information.

Websites of Interest

<http://www.montrealjazzfest.com>

<http://www.stcum.qc.ca>

<http://www.admtl.com>

<http://www.viarail.ca>

Montreal Tourisme Bureau information and city web site:
<http://www.tourisme-montreal.org>

Those Little Details

Following are some of the small details you'll want to keep handy as you prepare for the Symposium. Should additional questions arise, contact the Association at (937) 222-0030; fax (937) 222-5794 or e-mail at aaainfo@cpaadmin.org.

Registration fees

Your registration fee covers all sessions, conference materials, refreshment breaks, the Wednesday evening reception, two continental breakfasts, two luncheons, and the Dinner Party. Hotel accommodations and other meals are not included. Information about hotel reservations and arranging transportation appears elsewhere in this brochure.

Spouses and guests are encouraged to attend the variety of social activities. Their \$75 registration fee includes the Wednesday reception and Thursday's Dinner Party.

Please note that the association does accept Visa and MasterCard for registration fees and membership dues.

Cancellations

Cancellations received before May 24 will receive a full refund. Cancellations received between May 24 and June 17 will receive a 50% refund. There will be no refunds after June 17. All cancellations must be in writing.

Recommended dress

We recognize that comfort is a key to successful learning, therefore our symposium 'dress code' is business casual. Business casual is appropriate for all sessions and evening activities.

Remember to bring a sweater or light jacket as hotel meeting room temperatures tend to vary.

Transportation

Montréal is an international city, accessible from just about anywhere!

Connected throughout the world by major airlines, Montréal is only an hour and a half from New York, two hours from Chicago, and six hours from the west coast. Montréal's airports are conveniently close to the city. Taxis, limousines and shuttle buses get travelers quickly to and from the city center, stopping at major hotels, including the Wyndham Montreal. Services are excellent, and available in many languages.

Trains from New York or Washington stop at Montréal's Gare Centrale, also the main stop for domestic trains from Eastern or Western Canada. The downtown stop is conveniently connected to Bonaventure underground Métro by a pedestrian corridor. Bus travelers land at downtown Terminus Voyageur, connected to the Métro.

By car, Montréal is only 47 km (29 mi) from the New York border. The New York State Thruway (I-87) becomes Route 15, U.S. I-89 becomes two-lane Route 133, joining Route 10 at the border. From I-91 in Massachusetts, Routes 55 and 10 reach Montréal. Entering from east or western Canada, Montréal is accessible on route 401, or the Trans-Canada Highway (Highway 1) via routes 20 and 40. Québec road signs are in French, and speed limits are in kilometers (100 kph equals about 62 mph). Gasoline is sold in liters (3¾ liters equal 1 U.S. gallon).

Please note when traveling outside the United States that you may need to contact your wireless service provider in advance to initiate international service.

Immigration Requirements

Whether you enter Canada by land, sea or air, there are certain formalities at the border.

For short term visits to Canada you will need a valid passport, unless you are an American citizen or permanent resident arriving from the U.S. in which case you must provide proof of citizenship or residency upon request. Proof of citizenship consists of a passport, original or certified copy of your U.S. birth certificate, current voter's registration card, U.S. military discharge papers, or certificate of citizenship or naturalization. For passport applications, locations of local establishments accepting applications and the most frequently asked questions about passports, visit www.travel.state.gov/passport_services.html.

Canada Customs

There are certain restrictions on what you may bring into Canada aside from your own personal effects. For detailed information on what you are allowed to bring in visit www.cdnconsulat-la.com/eng/trade/travgood.htm.

Currency

For visitors from many countries including the U.S.A. exchange rates with the Canadian Dollar are very much in their favor, making a trip to Canada particularly good value for money.

Travelers checks and major credit cards are accepted at most commercial establishments. Many stores accept U.S. currency, but for a better rate it is best to exchange these at a bank or currency exchange facility. All banks cash and sell travelers checks and exchange currency for Canadian Dollars. Most banks are open from Monday to Friday from 10:00 a.m. to 4:00 p.m. A few banks are open on Saturdays. Cash machines or ATMs are widespread.

GST Refunds

Did you know that travelers to Canada are eligible to receive tax refunds on purchases over \$50 CDN, including hotel charges? The Goods and Services Tax (GST) is a national 7% sales tax charged on all purchases and collected by merchants. You may also qualify for PST (Provincial Sales Tax) and HST (Harmonized Sales Tax) refunds. As a foreign traveler to Canada, significant savings can be realized by taking advantage of this refund program.

International Tax Refund Services clears the way to ensure your GST refund is maximized and returned as quickly as possible. A mistake on your part may result in Revenue Canada not accepting your claim.

You qualify for a refund if:

- you are not a resident of Canada
- you have ORIGINAL RECEIPTS
- the combined total of all your receipts is a minimum of \$200 CDN.
- each individual receipt shows a minimum of \$50 CDN.

For a refund form or procedures call 1-800-66-VISIT (Canada) or (613) 991-3346 or visit www.gstrebate.com.

Registration hours

Attendees may register at the AAA registration desk beginning on Wednesday, June 25 at 11:00 a.m. The registration desk will be open at 7:00 a.m. each day of the symposium for registration information or questions.

Hotel

All scheduled events will take place at the Wyndham Montreal (www.wyndham.com/montreal), 1255 Jeanne Mance Street in Montreal, Canada H5B 1E5. You can reach the hotel at 514.285.1450. Should you need to send packages to the hotel, include your name, arrival date and the words "hotel guest" on the mailing label.

All reservations should be made through AAA. Reservations by telephone, fax, email or on-line will be accepted (see enclosed form). The group's room block will be released on May 9, 2003. All reservations received after this date will be reserved on a space and cost availability basis. AAA's preferred room rate is \$205/\$215 Canadian per night plus tax (currently 14.50%) for single or double occupancy. Currently the rates are ~\$137.00/\$147.00 US.

Conveniently located in the heart of Montréal's cultural district, the Wyndham Montreal features 600 spacious guestrooms, an indoor pool and fitness facility, an outdoor sundeck, a whirlpool and sauna, a café overlooking a garden terrace, a piano bar and a business center. The Complexe Desjardins with 150 shops and boutiques, restaurants and movie theaters is adjacent to the hotel. Old Montreal, Chinatown and the trendiest restaurants on St-Laurent and St-Denis streets are within walking distance from the hotel.

Guest Room Amenities

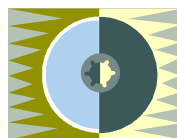
- Attractive guest rooms, carefully detailed for the business traveler
- Coffee maker and complimentary coffee in every room
- Alarm clock/radio in all rooms
- Hairdryer in all rooms
- Iron and ironing boards in all rooms
- Wayport high-speed Internet access
- Real hangers and shower massager
- Color television with remote control
- Cable channels and in-room movies
- Non smoking rooms available

Hotel Services

- Pool
- Laundry and valet service
- Safe-deposit boxes available
- Evening room service
- Currency exchange
- Business center
- Indoor valet parking

Resources to complement your learning experience!

Each full symposium registrant will receive one copy of all session handouts on compact disc accompanied by a notebook for taking notes during educational sessions.



Individual photocopies of handouts will be available on-site for note taking. The CD also includes important information about Association services and products as well as information regarding the AAA website – your resource to the accounting administration world.

Plus, information about vendors and sponsors with links to their websites is included.

Weather

Montreal averages some of North America's most beautiful summer weather. The city is blessed with an abundance of warmth and sunshine.

Temperatures during the summer average 82 degrees F during the day and a pleasant 74 F at night.

CPE approved

The Association for Accounting Administration 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 addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Nashville, TN, 37219-2417. Telephone: 615.880.4200. Web site: www.nasba.org.



Upon course and evaluation completion, participants attending the 2002 National Symposium, desiring CPE credit will earn 18 hours.

The Symposium does not require advance preparation or prerequisites.

The Chartered Accountant (CA) is Canada's premier business and financial designation. CAs are recognized throughout the world for their high professional standards, competence, integrity and commitment to serving the public interest.

Becoming a CA is an excellent springboard for careers in business, public practice, government or academia.

In Canada, CAs are admitted to the profession through their province, which are responsible for the qualification process, admission criteria, and performance standards within their jurisdictions.

Individuals with accounting designations from a number of accounting bodies outside Canada are admitted to the Canadian profession under the terms and commitments of international qualifications.

The CICA plays a critical supporting role in the CA qualification process, working closely with the provincial institutes/ordre to ensure the development and maintenance of nationally consistent standards for the profession's qualification process. These standards are important to ensure the portability of the CA designation across Canada and internationally, through our agreements with many other countries.

The profession is currently in the process of establishing uniform guidelines for training offices and for the providers of CA education. Draft guidelines are in consultation. For information about continuing education requirements for the Canadian Institute of Certified Accountants, visit www.cica.ca.

Evening activities

In addition to quality continuing education, we will be enjoying many of the things that make Montreal unique. Our evening activities will begin Wednesday with a welcome reception at the Musée d'Art Contemporain de Montreal in the Sculpture Garden (www.macm.org). This event will take place jointly with the participants of the American Woman's Society of CPAs 2003 National Conference who will be in Montreal at the same time for their annual event. The Musée d'Art Contemporain de Montréal was founded by the Québec government in 1964. The museum began as a department within Québec's ministère des Affaires culturelles. In 1983, the government changed the museum's status, making it an autonomous body with its own Board of Directors. Its mission is to make known, promote and preserve contemporary Québec art and to ensure a place for Canadian and international contemporary art through exhibitions and numerous other cultural activities.

After being housed in three different locations from the time it was established, the Musée moved to the heart of downtown on May 28, 1992. Truly a museum for the twenty-first century, the Musée d'Art Contemporain de Montréal stands next to Place des Arts, in Canada's only cultural complex devoted to both the performing and visual arts.

AAA symposium participants will have an opportunity during the day on Wednesday to make reservations at one of Montreal's fine restaurants. AAA will be arranging a Montreal-style dine-around for those wanting to sample a taste of the city.

Thursday evening, guests will participate in AAA's second annual AAA Dinner Party at the Wyndham Montreal. The evening will be complete with networking, awards presentations, and entertainment.

Attention non-members

Join AAA

Join the Association for Accounting Administration now and take advantage of the dozens of membership benefits and discounted fees for the Symposium.

The Association for Accounting Administration (AAA) has more than 575 members nationwide. Its main objective is to develop and maintain, through cooperative efforts, a high level of professional skills required to satisfy members' growing professional needs in the field of accounting administration.

AAA has published not only *ADA Job Descriptions for CPA Firms*, a *Survey Manual*, a *Marketing Manual*, a *telephone directory*, a booklet, *A Guide to CPA Firm Administration*, a *Disaster Planning Guide for CPA Firms*, an *Employee Orientation & Training Manual*, *A Guide to CPA Firm Intranets*, and *The Funtastic Firm*, but in 2003 will be distributing a publication entitled *The Guide to Paperless Administration*. The association's booklet, *A Guide to CPA Firm Administration* is not only a membership benefit but is marketed to others in the profession, for a small fee. The booklet is a must have for anyone involved with CPA firm administration. In

addition, benefits through membership include a resource bank, networking and educational conferences, technology seminars, group purchasing programs, a member to member survey program and a lending library, to name a few.

The association is the one representative voice of professionals managing accounting firms. It has fourteen (14) regional chapters, offering additional networking and educational opportunities. The cost to join is \$275 per year for a regular member (full-time staff personnel engaged in the administration of an accounting firm) and \$500 for an associate member (persons representing companies that sell products or services to association members). Discounted membership fees are available for multiple members from the same firm. For more information, contact the AAA National Office at 136 South Keowee Street, Dayton, Ohio 45402; 937.222.0030; by email at aaainfo@cpaadmin.org or visit us at www.cpaadmin.org.

Mark your calendar for other educational opportunities by AAA

2004 National Conference - CPE: 18 hours
June 23-25, 2004 - St. Louis, Missouri

Register Today!

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