

A Program Designed Exclusively for Professionals Managing Accounting Practices



Association for Accounting Administration

2005 National Symposium
June 21-24, 2005
Scottsdale, Arizona
at The DoubleTree Paradise Valley Resort
Preliminary Program

Catching Opportunities



Keynote Speaker:
David Maister Unleashed

Peter Drucker, Tom Peters, and Warren Bennis have revolutionized corporate America. Now David Maister is revolutionizing professional service firms. Enlist in the movement against "business as usual" firm management at the 2005 AAA National Symposium.

Featured Speakers Include:

David Maister, Rita Keller, Jack McCall, Roman Kepczyk, Marsha Petrie Sue, Chris Bauer, Chris Perrino, Don Scholl, and more.

The symposium is known for covering all areas of accounting firm management including human resources, management, administration, marketing and technology with unlimited networking opportunities.

Back by Popular Demand:

ATA Fly-In: A full-day session with optional extended program exclusively for the Accounting Technology Administrator

www.cpaadmin.org

The symposium for professionals managing accounting practices

The Association for Accounting Administration invites you and others from your firm to attend its 2005 National Symposium, *Catching Opportunities*. The event has been exclusively designed to help participants professionally manage accounting practices of varying sizes. The two-and-a-half day educational extravaganza 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.

AAA has re-designed the Rise & Shine Breakfasts and Lunch & Learn sessions to maximize networking and discussion time for attendees.

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. The event also features the A.C.E. Award, the profession's most coveted award given for achievement, commitment to the profession and excellence.



What is the Association for Accounting Administration?

The Association for Accounting Administration (AAA) has more than 625 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, The Fantastic Firm, and The Guide to Paperless Administration, but in 2004 introduced a web-based Resource Bank, a bank of knowledge for professionals involved in accounting administration. Also in 2004, in conjunction with the AICPA, AAA compiled and published Timesavers, one of the most useful firm management tools you'll encounter. Timesavers is a collection of 200 interactive forms, checklists and surveys. The information covers all areas of practice management including practice development, administration and personnel. In addition to the many publications, benefits through membership include 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. Check out the Association's Web site at www.cpaadmin.org.

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 network of outstanding professionals.
- ready to promote your firm in today's marketplace.
- a beginner or veteran.

In the past, the Symposium has attracted professionals 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.

What will you learn at the AAA National Symposium?

- Means for achieving effective communication.
- How to identify and address new leadership issues.
- Motivational strategies that work.
- The latest developments in the accounting profession, management, professional and personal development, technology, human resource management, and accounting marketing.
- Methods for effective management of people and the marketplace.
- Sales management tactics for implementation.

Activities & Sightseeing

Symposium Activities

In addition to quality continuing education, unlimited networking opportunities will be available. Tuesday evening will feature the Symposium's welcome reception poolside at the DoubleTree Paradise Valley Resort. This year the reception will take on a taste of the Southwest you won't want to miss.

Wild West Adventure

Wednesday evening, June 22 will be an adventure you won't soon forget. Ever been to an event where they've put flats, a split rail fence and hay bales in a ballroom and called it a western event? Of course you have. And for some groups, that's fine. But for the AAA 2005 National Symposium, we wanted to present the "wow" factor, so we've partnered with Fort McDowell Adventures and will be traveling to La Pesta del Sol for an evening of food, atmosphere, and entertainment.

Standing above the desert on a flower studded hilltop stands La Puesta del Sol, a place where anyone can assume a more western attitude. Built solely for the purpose of making entire groups part of the western experience, La Puesta comes equipped with genuine western flair. The venue features indoor fire pits, a western saloon and town facades, western game facades, BBQ grills, an elevated stage, dance floor and spectacular 360 degree panoramic views. Views of the McDowell, Four Peaks, Mazatzal, Superstition and Red Mountain ranges as well as the 560' high fountain located in nearby Fountain Hills will "wow" the most seasoned of visitors. Participants will enjoy great food, beverages, a unique atmosphere and unbelievable networking opportunities. Full Symposium registrants have the Wild West Adventure included. Guests should plan to join the group by registering separately (see registration form) for the event.

Sightseeing

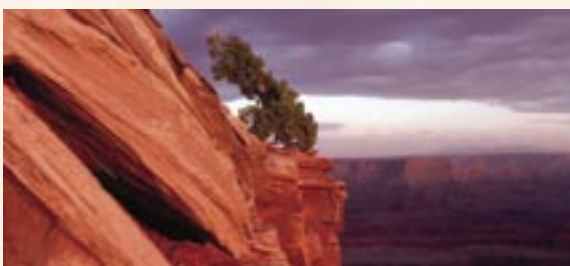
Scottsdale attractions are many and varied. Enjoy Scottsdale art galleries, desert adventures, shops and malls, and day tours in and around Scottsdale.

300+ days of sunshine are ideal for outdoor recreation and hiking. There are over 100 art galleries in Scottsdale featuring every kind of art and sculpture...plus once a year artists from all over the U.S. come to Scottsdale to show off their wares "under the tent" at Celebration of Art.

You'll never run out of things to do. In fact being centrally located in Arizona, it makes a great jumping off point to explore the entire state of Arizona, from the Grand Canyon to Sedona, Tucson, and Tombstone.

Town of Paradise Valley

The Town of Paradise Valley was incorporated in May of 1961 and carries a rich history. The town encompasses an area of 16.5 square miles and in 2000 had a population of 13,644.



Sights of Interest

With more than 330 days of sunshine a year, Scottsdale is the perfect playground to indulge in your favorite adventure - or even discover a new one. Reach new heights with a hot air balloon ride. Or see the beauty of the Sonoran Desert up close with a morning trail ride in the McDowell Mountain foothills and watch the desert come alive around you. Want more? Float down the cool waters of the Salt River on a raft, dive into the crystal blue waters of a hotel or resort pool, or glide across Saguaro Lake in a kayak. Go biking, climb a mountain, take a Jeep tour - well, you get the idea.

Visit www.arizonaguide.com for more information regarding area and state-wide attractions.

Websites of Interest

www.insider-scottsdale.com

www.golfarizona.com

www.ci.scottsdale.az.us

Scottsdale Convention & Visitor's Bureau website:

Web site: www.scottsdalecvb.com

Schedule At-A-Glance

Monday, June 20, 2005

7:30 a.m. – 5:00 p.m. **CPA Firm Association Meetings**
(schedules to be determined)

Tuesday, June 21, 2005

7:30 a.m. – 5:00 p.m. **CPA Firm Association Meetings**
(schedules to be determined)

8:00 a.m. – 4:00 p.m. **ACCOUNTING TECHNOLOGY ADMINISTRATOR'S FLY-IN**

8:00 a.m. – 8:30 a.m. **ATA Fly-In Coffee and Registration**

8:30 a.m. - 11:30 a.m. **ATA Fly-In Session I**

Led by Roman Kepczyk, InfoTech Partners North America and Trey James, Xcentric Group

11:30 a.m. - 1:00 p.m. **ATA Fly-In Networking Lunch**

1:00 p.m. - 4:00 p.m. **ATA Fly-In Session II**

Led by Roman Kepczyk, InfoTech Partners North America and Trey James, Xcentric Group

3:00 p.m. – 6:00 p.m. **Symposium Registration**

1:00 p.m. – 2:00 p.m. **First Timer's Forum** – *By Virginia Lowery, Illinois Agricultural Auditing Association and Rita Keller, Brady Ware & Schoenfeld*

2:00 p.m. – 5:00 p.m. **Practice Management 101** – *By Rita Keller, Brady Ware & Schoenfeld*

6:00 p.m. – 7:00 p.m. **Welcome Reception**

Poolside at the Resort – Join other Symposium participants for an evening of networking and fun. The evening will include a Southwest flavor with hor d'oeuvres and a cash bar.

Wednesday, June 22, 2005

6:15 a.m. **Cool Walkings – Morning Power Walk**

Led by Roman Kepczyk, InfoTech Partners North America

7:00 a.m. – 5:00 p.m. **Registration with the Vendors**

7:30 a.m. – 8:30 a.m. **Continental Breakfast: Raising the Bar Panel**

Moderator: Debbie Sessions, Porter Keadle Moore

8:45 a.m. – 9:15 a.m. **Opening with A.C.E. Award Presentation**

*Cindie Hubiak, President and CEO, Arizona Society of CPAs
CPA Practice Management Forum/AAA*

9:15 a.m. – 10:30 a.m. **The CEO of You** – *By Marsha Petrie Sue, Marsha Petrie Sue, MBA*

10:30 a.m. – 10:45 a.m. **Refreshment Break with the Vendors**

10:45 a.m. – 12:15 p.m. **BREAKOUT SESSIONS BY FIRM SIZE**

A <25 People	B 26-40 People	C 41-75 People	D 76-100 People	E 101+ People	F Walk the Less Paper Line
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F *Designed for those attending the ATA Fly-In*

12:15 p.m. – 1:30 p.m. **LUNCH & LEARN**

** Continuation of discussions and topics from Breakout Sessions by Firm Size*

G <25 People	H 26-40 People	I 41-75 People	J 76-100 People	K 101+ People	L Technology
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L *Designed for those attending the ATA Fly-In*

Schedule At-A-Glance

1:30 p.m. – 3:00 p.m. BREAKOUT SESSIONS

M **Where Has All the Paper Gone?**
By Roman Kepczyk, InfoTech Partners North America

N **Sales Management Tactics Anyone Can Implement**
By Chris Perrino, Barnes Dennig & Co.

O **Incorporating Incentives Into the Total Compensation System**
By Mike Chapman, Human Resource Strategies

P **The Flexibility Factor**
By Marsha Petrie Sue, Marsha Petrie Sue, MBA

3:00 p.m. – 3:15 p.m. Refreshment Break with the Vendors

3:15 p.m. – 4:45 p.m. Ethics in Business: A Preventive Maintenance Approach – By Chris Bauer, Bauer Coaching

6:00 p.m. – 9:30 p.m. AAA Wild West Adventure

Dinner and entertainment will take place at La Puesta del Sol, a working ranch with an authentic Southwestern atmosphere.

Thursday, June 23, 2005

6:15 a.m. Cool Walkings – Morning Power Walk – Led by InfoTech Partners North America

7:00 a.m. – 5:00 p.m. Registration with the Vendors

7:30 a.m. – 8:30 a.m. DOCUMENT MANAGEMENT VENDOR TOUR CONTINENTAL BREAKFASTS

Q TBD

R TBD

S TBD

T Table Topics

8:45 a.m. – 10:15 a.m. Making Practices Work – By David Maister

10:15 a.m. – 10:30 a.m. Refreshment Break with the Vendors

10:30 a.m. – 11:45 a.m. BREAKOUT SESSIONS

U **25 Remaining Secrets to Help Your Firm Grow**
By Chris Perrino, Barnes Dennig & Co.

V **The Administration of Mergers and Acquisitions**
By Don Scholl, D.B. Scholl

W **Recruiting and Retaining Top Talent**
By Rita Keller, Brady Ware & Schoenfeld

12:00 p.m. – 1:15 p.m. Luncheon with AAA Business Meeting

1:15 p.m. – 2:45 p.m. BREAKOUT SESSIONS

X **New Leadership Issues: Identifying and Addressing**
By David Maister

Y **Beyond the Budget: Ideas for Better Planning and Financial Analysis**
By Debbie Sessions, Porter Keadle Moore

Z **Could Your Benefit Package Be Better?**
By Linda Pappajohn, Santora Baffone CPA Group

2:45 p.m. – 3:00 p.m. Refreshment Break with the Vendors

3:00 p.m. – 4:30 p.m. David Maister Unleashed – By David Maister

Evening Evening On Your Own

Friday, June 24, 2005

7:30 a.m. – 8:45 a.m. Breakfast: Why is Your Computer Smiling? Sponsored and Presented by Roman Kepczyk, InfoTech Partners North America

9:00 a.m. – 10:30 a.m. Building a Great Team: Creating Synergism: The Last Frontier By Jack McCall, Jack McCall, Inc.

10:30 a.m. – 10:45 a.m. Refreshment Break with the Vendors

10:30 a.m. – 11:45 a.m. Building a Great Team: Creating Synergism: The Last Frontier (continued) By Jack McCall, Jack McCall, Inc.

11:45 a.m. – 12:00 p.m. Symposium Closing – John Watton, AAA Director of Education

Times are subject to change.

Featured Presentations

FEATURING DAVID MAISTER UNLEASHED

Peter Drucker, Tom Peters, and Warren Bennis have revolutionized corporate America. Now David Maister is revolutionizing professional service firms. Enlist in the movement against 'business as usual' firm management at the 2005 AAA National Symposium.



Accounting Technology Administrator Fly-In

Optional Pre-Symposium Offering

The Association for Accounting Administration recently unveiled a Special Interest Group (SIG) and is again offering a one-day program designed specifically for this group of professionals and those with interest. The SIG is for Accounting Technology Administrators otherwise known as CPA Firm Network Administrators and Firm Administrators responsible for managing technology within their accounting firm. This SIG will help ATAs effectively manage technology in the firm and provide networking opportunities.



The one-day program will be held on Tuesday, June 21, 2005 in conjunction with the AAA 2005 National Symposium. This interactive program for the profession will be led by Roman H. Kepczyk of InfoTech Partners North America and Trey James of the Xcentric Group, the ATA

Fly-In's sponsor. Roman is also an AAA Advisory Board member and one of the profession's leading authorities on firm technology issues.

This year's session will focus on the following topics:

- Security
- Remote access
- Technology tools
- Information exchange
- Top technologies and what to watch
- Free resources and tools

Participants will receive a listing of all participants to use for further networking, an executive summary of the session and a complete listing of tools and web resources for ATAs. Registrants will be encouraged to send questions before the session to ensure all subjects of importance are covered. Discounted registration fees are available for SIG members and Symposium registrants and all ATA Fly-In registrants are invited to sessions and meals on Wednesday, June 22 to further open discussions on topics of interest (excluding the Wild West Adventure).

Symposium Sponsors

Symposium sponsors confirmed at press time include:

- Golden Marketing Resources
- Infotech Partners North America
- Indiana Chapter of AAA
- Ohio Chapter of AAA
- Olson & Company PC
- Upstream Academy
- Xcentric Group

Opportunities are available to be a sponsor of several Symposium events and activities and to display your products and/or services throughout the event. Contact the AAA National Office to receive an information packet or visit the Association's website at www.cpaadmin.org.

Symposium Schedule

Monday, June 20, 2005

7:30 a.m. – 5:00 p.m.

CPA Firm Association Meetings
(schedules to be determined)

Tuesday, June 21, 2005

7:30 a.m. – 5:00 p.m.

CPA Firm Association Meetings
(schedules to be determined)

8:00 a.m. – 4:00 p.m.

**ACCOUNTING TECHNOLOGY
ADMINISTRATOR'S FLY-IN**

Program Level: Intermediate
NASBA Field of Study: Management
CPE Credit: 7

After last year's rousing success, AAA is bringing back Roman Kepczyk of InfoTech Partners North America to preside over another technology fly-in along with Trey James from the Xcentric Group, the session's sponsor. This year's session will focus on topics of security, remote access, and technology tools and will include plenty of time for open discussion. Special breakouts will be scheduled by firm size and accounting software suite to promote networking with peers using the same applications and tools.

Plan to extend your stay and join participants on Wednesday in sessions specifically designed for those involved in technology (ATA Fly-In registration includes the Tuesday evening reception and all meals and sessions on Wednesday, June 22, 2005).

AAA introduced a Special Interest Group (SIG) in 2004 for Accounting Technology Administrators otherwise known as CPA Firm Network Administrators and Firm Administrators responsible for managing technology within their accounting firm. The SIG was implemented to help ATAs effectively manage technology in the firm and provide networking opportunities.

8:00 a.m. – 8:30 a.m.

ATA Fly-In Coffee and Registration

8:30 a.m. – 11:30 a.m.

ATA Fly-In Session I

Led by Roman Kepczyk, InfoTech Partners North America and Trey James, Xcentric Group

Session leader Roman Kepczyk is president of InfoTech Partners North America, Inc. and the Lead Technology Management Strategist for the firm. His primary focus is helping firms throughout North America effectively use information technology by implementing best practices and directing them toward today's "paperless" or Digital CPA firm. He is currently the Chairman of the AICPA's Information Technology Executive Committee and a member of the AICPA's Special Committee on Enhanced Business Reporting. On a technical level, Roman is an AICPA Certified Information Technology Professional. He authored technology chapters for the PPC MAP Handbook, PPC Guide to Paperless Engagements, and sections of the AICPA MAP Handbook as well as co-authored the 2003 AICPA Top Technologies Guide. He also authored the AAA Guide to CPA Firm Intranets and co-authored their 2003 Guide to Paperless CPA Firm Administration.

Session leader Trey James is the CEO and President of Xcentric, LLC, a national technology consulting firm specializing in serving the IT needs of CPAs. Mr. James offers more than ten years experience in the highly specialized accounting niche: served as the President of an IT consulting practice in Fort Worth, Texas; Director of Sales for CPA Systems Inc., an Atlanta based IT consulting firm; and currently owns and operates Xcentric, LLC. Trey is consistently published in multiple industry publications, including Accounting Today, Accounting Technology and Practical Accountant. He is often called upon by editors and industry consultants to give his expert opinion as it relates to technology in the Accounting niche. Xcentric currently serves over 200 CPA firms across the nation and focuses on planning, deploying, maintaining and enhancing technology within the CPA firm.

11:30 a.m. – 1:00 p.m.

ATA Fly-In Networking Lunch

1:00 a.m. – 4:00 p.m.

ATA Fly-In Session II

Led by Roman Kepczyk, InfoTech Partners North America and Trey James, Xcentric Group

12:00 p.m. – 6:00 p.m.

Symposium Registration

1:00 p.m. – 2:00 p.m.

First Timer's Forum

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

Program Level: Overview
NASBA Field of Study: Personal Development
CPE Credit: 1

If this is your first AAA National Symposium, or first in several years, you are encouraged to participate in this lively and interactive session designed to help facilitate your symposium experience. Spend an hour 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.

2:00 p.m. – 5:00 p.m.

Practice Management 101

By Rita Keller, Brady Ware & Schoenfeld

Program Level: Basic
NASBA Field of Study: Management
CPE Credit: 3

This session is exclusively 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, it would benefit you to plan your travel schedule accordingly. Rita Keller is one of the most sought after administrative coaches in the country and will help participants grow and develop in their respective roles.

6:00 p.m. – 7:00 p.m.

Welcome Reception

Poolside at the Resort

Join other Symposium participants for an evening of networking and fun. The evening will include a Southwest flavor with hor d'oeuvres and a cash bar.

Wednesday, June 22, 2005

6:15 a.m.

Cool Walkings – Morning Power Walk

Led by Roman Kepczyk, InfoTech Partners North America

Join other attendees for a relaxing walk through some of Scottsdale's most scenic surroundings. Time will be provided to freshen up before sessions begin. Meet in the main lobby of the hotel.

7:00 a.m. – 5:00 p.m.

Registration with the Vendors

7:30 a.m. – 8:30 a.m.

Continental Breakfast: Raising the Bar Panel

Moderator: Debbie Sessions, Porter Keadle Moore

Program Level: Overview
NASBA Field of Study: Management
CPE Credit: 1

Professional managers with various backgrounds will take questions from the audience and provide realistic and applicable advice. The format is designed as an open interactive forum.

8:45 a.m. – 9:15 a.m.

Opening with A.C.E. Award Presentation

Cindie Hubiak, President and CEO, Arizona Society of CPAs
CPA Practice Management Forum/AAA

A welcome by the Arizona Society of CPAs will be followed by the announcement of the 2005 A.C.E. Award winner, the profession's most coveted recognition. A.C.E. stands for Achievement, Commitment and Excellence and the award, formerly known as the Accounting Firm Administrator of the Year Award is co-sponsored by AAA and CPA Practice Management Forum. Nominees hold a senior-level administration position for a public accounting firm and criteria for selection focus on leadership and the individual's strategic impact on the firm's profit and growth.

9:15 a.m. – 10:30 a.m.

The CEO of You

By Marsha Petrie Sue, Marsha Petrie Sue, MBA, MPS, Inc.

Program Level: Intermediate
NASBA Field of Study: Management
CPE Credit: 1.5

This session will connect core values with personal responsibility. Participants will be able to immediately apply the departmentalization techniques from this presentation. This powerful message of becoming the Chief Energizing Officer

Symposium Schedule

of Your Own Uniqueness will increase productivity and profitability. Goals will be met, morale will be high and an environment of positive achievement will be reached. Teams and individuals will flourish with the understanding of departmentalizing life – both professionally and personally.

Marsha Petrie Sue, MBA and former corporate executive is the CEO of MPS, Inc., a global speaking practice and training company. Her programs are known for clarity of purpose, clear agendas, contextual and relevant experiences, and fun to meet the needs of all participants.

10:30 a.m. – 10:45 a.m. Refreshment Break with the Vendors

10:45 a.m. – 12:15 p.m. Breakout Sessions by Firm Size

Program Level: Basic
NASBA Field of Study: Management
CPE Credit: 1.5

Participants will select the session matching the number of personnel at their respective firms. Moderators will ensure focused discussions on topics and issues of importance to the participants. Forum agendas will be determined prior the Symposium to help allocate time to the topics of interest and need.

- A** <25 People
- B** 26-40 People
- C** 41-75 People
- D** 76-100 People
- E** 101+ People
- F** Walk the Less-Paper Line
Session F is designed for those attending the ATA Fly-In

12:15 p.m. – 1:30 p.m. LUNCH & LEARN

Program Level: Basic
NASBA Field of Study: Management
CPE Credit: 1

Prior year participants have asked for additional time to discuss pertinent topics with peers in groups of similar sized firms. During this Lunch & Learn, participants will be able to continue discussions from the morning sessions or use the time for more networking.

- G** <25 People
- H** 26-40 People
- I** 41-75 People
- J** 76-100 People
- K** 101+ People
- L** Technology
Session L is designed for those attending the ATA Fly-In

1:30 p.m. – 3:00 p.m. BREAKOUT SESSIONS

M Where Has All the Paper Gone?

By Roman Kepczyk, InfoTech Partners North America

Program Level: Intermediate
NASBA Field of Study: Management
CPE Credit: 1.5

Find out about today's latest trends in document management applications and tools. The session will describe the process to take your firm to a "less-paper" environment. Should you buy a document management system that is part of your accounting suite or from your hardware vendor? What scanners and duplicators are improving firm processes? What about storing files on the internet? Separate the hype from the reality in this session designed to get you and your firm on the digital track.

N Sales Management Tactics Anyone Can Implement

By Chris Perrino, Barnes Dennig & Co.

Program Level: Intermediate
NASBA Field of Study: Management
CPE Credit: 1.5

If you believe that what gets measured gets done, then this is the session for you. Winning new business is vital for most firms but competition is tough! This underscores the importance of keeping your rainmakers focused on the opportunities in the pipeline. This presentation will look at a detailed new business opportunity tracking and reporting system that can help you start or strengthen a sales culture in your firm. Armed with the tools and tactics presented in this session, you'll be able to fine-tune or enhance your proposal tracking system that may be currently in place or take the first steps toward implementing a more robust system at your firm. These concepts can help move you beyond mere tracking of data and into the realm of catalyst for higher levels of achievement in practice development.

O Incorporating Incentives Into the Total Compensation System

By Mike Chapman, Human Resource Strategies

Program Level: Intermediate
NASBA Field of Study: Management
CPE Credit: 1.5

To achieve maximum results from any incentive plan, it must be integrally supported by your compensation system. This session will lead you through the steps in developing a sensible compensation system and the objectives of an incentive plan. You will learn the basics enabling you to bring your own system up to de facto state of the art, while seeing some of the weighted factors that some use in an incentive plan.

P The Flexibility Factor

By Marsha Petrie Sue, Marsha Petrie Sue, MBA

Program Level: Overview
NASBA Field of Study: Management
CPE Credit: 1.5

A powerful program igniting leadership peak performance in motivating, managing and

taking charge of change. This session will be seen as a wake-up 'call to arms,' motivating and moving leaders to be challenged by their own flexibility. Regardless of your previous experience, you can always work smarter and perform your job more effectively by focusing on the attitude of the environment. Become even more skilled than you already are by building an anastrophic view rather than the more common catastrophic view in your leadership perspective. Valuable insights and ideas to help participants attain a higher level of enjoyment and accomplishment while inspiring the same in those around you will be provided while those attending will identify leadership behavior and focus on new measures to improve success and flexibility.

3:00 p.m. – 3:15 p.m. Refreshment Break with the Vendors

3:15 p.m. – 4:45 p.m. Ethics in Business: A Preventive Maintenance Approach

By Chris Bauer, Bauer Coaching

Program Level: Overview
NASBA Field of Study: Management
CPE Credit: 1.5

Learn the actual meaning of ethics (it's not what most folks think!) as well as how the principles of ethics can be built into the everyday thoughts and actions of every employee. Learn how to make ethics intertwine with your mission statement so that ethics can become a true cornerstone of your business practices.

6:00 p.m. – 9:30 p.m. AAA Wild West Adventure

Dinner and entertainment will take place at La Pu esta del Sol, a working ranch with an authentic Southwestern atmosphere. Buses will depart from the main lobby at 6:00 p.m.

Thursday, June 23, 2005

6:15 a.m. Cool Walkings – Morning Power Walk

Led by InfoTech Partners North America

Join other attendees for a relaxing walk through some of Scottsdale's most scenic surroundings. Time will be provided to freshen up before sessions begin. Meet in the main lobby of the hotel.

7:00 a.m. – 5:00 p.m. Registration with the Vendors

7:30 a.m. – 8:30 a.m. DOCUMENT MANAGEMENT VENDOR TOUR CONTINENTAL BREAKFASTS

Program Level: Overview
NASBA Field of Study: Management
CPE Credit: 1

- Q** TBD
- R** TBD
- S** TBD
- T** Table Topics

Symposium Schedule

8:45 a.m. – 10:15 a.m. **Making Practices Work**

By David Maister

Program Level: Intermediate
NASBA Field of Study: Management
CPE Credit: 1.5

This session is a culmination of many of Mr. Maister's most talked about sessions, his articles and his books. He will touch on each of the areas necessary to make practices work: business development, the manager's role, coaching the individual as well as the team, strategy and culture, profitability and of course quality.

10:15 a.m. – 10:30 a.m. **Refreshment Break with the Vendors**

10:30 a.m. – 11:45 a.m. **BREAKOUT SESSIONS**

U 25 Remaining Secrets to Help Your Firm Grow

By Chris Perrino, Barnes Dennig & Co.

Program Level: Basic
NASBA Field of Study: Management
CPE Credit: 1.5

What are the mission-critical elements of the rain-making process that, if mastered, can make the difference between breaking even and breaking records? What tools and tactics can you deploy to the front-line troops that can make a fundamental difference in the way they are perceived by clients and prospects? Find the answers to these questions and more by attending this session: Here's what else you'll take back to your firm and implement:

- The three critical things you must do before every new business meeting
- How to fully deploy "War Stories" during the proposal process
- The differences between selling to CFOs and selling to CEOs
- How to make "closing" the logical next step in the process

Real-life examples will keep this discussion lively and insightful.

V The Administration of Mergers and Acquisitions

By Don Scholl, D.B. Scholl

Program Level: Intermediate
NASBA Field of Study: Management
CPE Credit: 1.5

Learn about the ins and outs involved in the administration of mergers and acquisitions. From checklists to culture impacts, professionals managing accounting practices have issues to tackle over and above the obvious.

W Recruiting and Retaining Top Talent

By Rita Keller, Brady Ware & Schoenfeld

Program Level: Basic
NASBA Field of Study: Management
CPE Credit: 1.5

One of the profession's most sought after administrative coaches will help identify

key recruiting issues and provide insight into making this task more effective. But recruiting the top talent is easier than retaining this talent in our competitive environment. Participants will learn what's needed to retain as well as how to implement programs to ensure your firm's recruiting and retention success.

12:00 p.m. – 1:15 p.m. **Luncheon with AAA Business Meeting**

1:15 p.m. – 2:45 p.m. **BREAKOUT SESSIONS**

X New Leadership Issues: Identifying and Addressing

By David Maister

Program Level: Overview
NASBA Field of Study: Management
CPE Credit: 1.5

This session will identify and address the issues facing the leaders of today including: managing instead of doing; managing people instead of numbers; promoting mutual respect; dealing with non-performers; "betting" bigger in new practice areas; rising internal politics; designing and absorbing more complex career paths; retooling; experimenting with risk-free personal growth; and articulating values and strategy to reduce ambiguity.

Y Beyond the Budget: Ideas for Better Planning and Financial Analysis

By Debbie Sessions, Porter Keadle Moore

Program Level: Basic
NASBA Field of Study: Management
CPE Credit: 1.5

CPA firms thrive on two things – great people and great numbers – this breakout session will address how to start with the past and plan for the future – a strategic look at your firm's strengths and opportunities – how to budget effectively, but aggressively; then, how to interpret the monthly and yearly results as you refine the process.

Z Could Your Benefit Package Be Better?

By Linda Pappajohn, SantoraBaffone CPA Group

Program Level: Overview
NASBA Field of Study: Management
CPE Credit: 1.5

Offering the same or similar benefits as other CPA firms in your area isn't enough to keep good people. Many firms lose employees (especially their 3-5 year accountants) to non-CPA organizations. This session will cover what benefits employees want and don't want, and what your competitors are offering to entice them away from your firm. We'll discuss the standard benefit package – insurances and time off – as well as a lot of other less obvious perks.

2:45 p.m. – 3:00 p.m. **Refreshment Break with the Vendors**

3:00 p.m. – 4:30 p.m. **David Maister Unleashed**

By David Maister

Program Level: Intermediate
NASBA Field of Study: Management
CPE Credit: 1.5

This session will feature the world's authority on the management of professional service firms. Mr. Maister will spend the day determining the topics needed most by attendees and will unleash nearly 30 years of experience and knowledge onto the audience. Managing the exceedingly independent, creative individuals who make up CPA firms is a particularly difficult challenge, but one Symposium participants will be closer to meeting at the end of this session.

Evening **Evening On Your Own**

Friday, June 24, 2005

7:30 a.m. – 8:45 a.m.

Breakfast: Why is Your Computer Smiling?

Sponsored and Presented by Roman Kepczyk, InfoTech Partners North America

Program Level: Overview
NASBA Field of Study: Personal Development
CPE Credit: 1

Start your Friday with a smile and find out what your people are chuckling about while you are out of sight and out of mind. This session will feature some of the best computer humor that has clogged your email servers, bogged down your Internet bandwidth, and probably given your people a break when they needed it most. This session is rated "I" for irrelevant, irreverent and incorrigible!

9:00 a.m. – 11:45 a.m. **Building a Great Team: Creating Synergism: The Last Frontier**

By Jack McCall, Jack McCall, Inc.

Program Level: Overview
NASBA Field of Study: Management
CPE Credit: 3

In every organization there are many individuals specializing in what they do best. This session will present tactful, positive techniques for improving organizational effectiveness through teambuilding. Focus will include: considering the delegation/trust dynamic; discovering what motivates team members to increase team effectiveness; avoiding the 10 most common mistakes made by managers and leaders; developing strategies to recognize employee resistance; and challenging team members to perform with courage.

10:30 a.m. – 10:45 a.m. **Refreshment Break with the Vendors**

11:45 a.m. – 12:00 p.m. **Symposium Closing**

John Watton, AAA Director of Education

No advanced preparation or prerequisites are required for any of these courses.

Fees/General Information

	On or Before April 18	After April 18
Full Member Registration	\$695	\$795
2nd or 3rd Person from Same Member Firm	\$595	\$695
Full Non-Member Registration.....	\$795	\$895
Package Registration (includes registration and one year membership) ..	\$870	\$925
Spouse/Guest Registration ...	\$75	\$75
Additional Wild West Event Tickets	\$75	\$75
One Day Registration (Wed. or Thur.)	\$400	\$450
Accounting Technology Administrator's Fly-In	\$299	\$299
Vendor Member Registration.....	\$650	\$750
Vendor Non-Member Registration.....	\$750	\$850

Fee Inclusion

Full registration fees cover all sessions, Symposium materials, refreshment breaks, the Tuesday evening reception, two continental breakfasts, one breakfast buffet, two luncheons, and the Wild West Adventure. Hotel accommodations and other meals are not included. Information about hotel reservations and arranging transportation appears elsewhere in this brochure.

Spouse/guest registration fees include the Tuesday evening reception and Wednesday's Wild West event. One-day registration fees include all scheduled activities and meals on the day selected. Please note vendor registrations include a table top display throughout the event.

Fees for the Accounting Technology Administrator's Fly-In are reduced to \$199 for ATA SIG members and/or full Symposium registrants. Registration includes the Tuesday evening reception and the ability to extend your stay and participate in all scheduled meals and sessions on Wednesday, June 22 with the exception of the Wild West Adventure.

Registration Desk

The AAA Registration Desk will be open during the following times:

Tuesday, June 21

12:00 p.m. – 6:00 p.m.

Wednesday, June 22

7:00 a.m. – 5:00 p.m.

Thursday, June 23

7:00 a.m. – 5:00 p.m.

Confirmation

Each registrant will receive written confirmation of registration. This confirmation will serve as a receipt of fees paid. Badges and materials will be available at the registration desk.

Cancellation Policy

Notification of cancellation must be submitted in writing to AAA headquarters. Cancellations received by mail, fax or email by Monday, June 6, 2005, will be subject to a \$50 cancellation charge. No refunds will be given after Monday, June 6, 2005. Substitutions are allowed at any time but must be submitted in writing.

Special Assistance



AAA wishes to ensure that no individual with a disability is excluded, denied services, segregated or otherwise treated differently from other individuals because of the absence of an auxiliary aid or service. If an auxiliary aid or service identified with the Americans with Disabilities Act is required, please contact AAA at (937) 222-0030.

Attire

Symposium participants should wear casual business attire, defined as dress slacks or casual dress wear. No jeans, please. The reception dress is casual dress. Please be sure to bring a sweater or light jacket as meeting room temperatures tend to vary. The AAA

Fees/General Information

Wild West Adventure on Wednesday evening will be casual or 'cowboy wear'.

Registration

The AAA national Symposium offers several registration options for the convenience of registrants:



On-Line Option - You may submit your registration form through the AAA Website at www.cpaadmin.org. On this web site, you will find a complete registration form that will process your completed registration with a credit card payment via a secure server.



Mail Option - If you prefer to mail your registration with a check (or credit card information), complete the registration form and mail to:

AAA, 136 South Keowee Street, Dayton, OH 45402.



Fax/Telephone Option - You may fax or call your registration into the National Office with your Visa or MasterCard to (937) 222-0030 or fax

(937) 222-5794.

Registrations can not be processed without complete payment information.

Continuing Professional Education Hours



Select from more than 50 hours of CPE to earn up to 26 hours of credits at the AAA National Symposium and ATA Fly-In. Two and-a-half days of sessions are offered during the meeting and a

full day prior, with topics of interest to those in public accounting. Attendees are responsible for determining their individual state's requirements for CPE.

AAA 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; www.nasba.org.



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 AAA services and products as well as information regarding the AAA Website – your resource to professionally managing an accounting practice. Information about vendors and sponsors with links to their Websites will be included.



Contact Us

If you have any questions regarding registration, refund, complaint and program cancellation policies, contact us at:

AAA NATIONAL OFFICE

136 South Keowee Street
Dayton, OH 45402

Phone: 937.222.0030 • Fax: 937.222.5794
aaainfo@cpaadmin.org

Hotel/Getting There

DoubleTree Paradise Valley Resort

5401 North Scottsdale Road, Scottsdale, AZ 85250

(480) 947.5400

Room Rate: \$79.00 single/double occupancy

www.paradisevalley.doubletree.com

The **Doubletree Paradise Valley Resort** hotel is located just minutes from Old Town Scottsdale and just 12 miles from Phoenix Sky Harbor International Airport. A member of the Hilton Hotels Family of Brands, the resort is located near Scottsdale Fashion Square, the largest shopping center in the Southwest.

All guestrooms offer the ambience of an upscale resort and amenities. Each luxurious guestroom features a view of lush courtyard filled pools and fountains or exquisite desert vistas.

Guest Room and Hotel Amenities

- High-speed Internet access
- Large work areas
- Fully-stocked honor bar
- Coffeemaker with complimentary coffee and tea
- Hairdryer / ironing board and iron
- USA Today
- Two large heated outdoor pools with Jacuzzi
- Health club facilities
- Kids play area
- Concierge service
- Full-service restaurant and lounge
- Business center
- In-room dining
- Full-serve spa and salon
- Lighted tennis courts
- Indoor racquetball courts
- Gift shop
- Complimentary shuttle service within three mile radius
- Complimentary parking

All scheduled educational events will take place at the DoubleTree Paradise Valley Resort, 5401 North Scottsdale Road, Scottsdale, AZ 85250. Registrants can reach the hotel at (480) 947.5400. 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. The group's room block will be released on May 20, 2005. All reservations received after this date will be reserved on a space available basis at the group rate. AAA's preferred room rate is \$79.00 per room per night plus tax (currently 7.7%) for single or double occupancy. The group rate has been extended three days pre and three days post the event for those wishing to spend a few days in the Scottsdale/Phoenix area.

Getting There

Phoenix (Scottsdale) has easy access. With 23 airlines servicing 89 U.S. cities with non-stop service, access couldn't be more convenient. Sky Harbor International Airport (www.phxskyharbor.com) is convenient and traveler-friendly. The DoubleTree Paradise Valley Resort is 12 miles from Sky Harbor International Airport. Ground transportation options include taxi cab, limo services or van shuttle. The DoubleTree Paradise Valley Resort recommends using Super Shuttle. Shuttles leave the airport every 15 minutes between 9:00 a.m. and 9:00 p.m. (less frequent shuttles from 9:00 p.m. until 9:00 a.m.) for the Paradise Valley resorts and hotels with reservations required for your return trip from the hotel to the airport. Shuttle fare averages \$16 per person one-way with discounted roundtrip offerings. For more information visit www.supershuttle.com or call (602) 244-9000.

Complimentary parking at the hotel is available for those driving to Scottsdale or renting automobiles. Valet parking is also available.

2005 National Symposium

registration form



Registrant Information (print or type)

Is this your first AAA National Symposium? Yes No

Name: _____ Nickname (for Badge) _____

Firm: _____

Business Address: _____

City, State, Zip Code: _____

Telephone: _____ Fax: _____ Email: _____

Number of AAA Symposiums Attended: _____ Years of Experience as an Administrator: _____ Size of Firm (personnel): _____

Guest's Full Name (all registered guests will have a name badge): _____

Breakout Session Selection - Circle session you will attend: See schedule for topics

Wednesday, June 22, 2005

Breakout Sessions by Firm Size (10:45 a.m. - 12:15 p.m.) **A** **B** **C** **D** **E** **F**
 Lunch and Learn (12:15 a.m. - 1:30 p.m.) **G** **H** **I** **J** **K** **L**
 Breakout Sessions (1:30 p.m. - 3:00 p.m.) **M** **N** **O** **P**

Thursday, June 23, 2005

Vendor Tour Continental Breakfasts (7:30 a.m. - 8:30 a.m.) **Q** **R** **S** **T**
 Breakout Sessions (10:30 a.m. - 11:45 a.m.) **U** **V** **W**
 Breakout Sessions (1:15 p.m. - 2:45 p.m.) **X** **Y** **Z**

Fees - Circle the Applicable Fees

	On or Before 4/18/05	After 4/18/05
AAA Member Full Registration	\$695	\$795
2nd or 3rd Person from the Same Member Firm	\$595	\$695
Non-Member Registration	\$795*	\$895*
Package Registration (includes registration and one year membership)	\$870	\$925
Spouse/Guest Registration	\$75**	\$75**
Additional Wild West Event Tickets	\$75	\$75
One-Day Registration <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday	\$400***	\$450***
Accounting Technology Administrator's Fly-In Registration	\$299	\$299
Fee is reduced to \$199 for ATA SIG members and/or full Symposium registrants.		
Vendor Member Registration	\$650****	\$750****
Vendor Non-Member Registration	\$750****	\$850****

* Join AAA at the time of registration and the \$25 initiation fee will be waived and member rates will apply.

**Spouse/guest registration includes Tuesday evening's welcome reception and the Wild West Adventure.

*** One-day fee includes all scheduled activities and meals on the day selected.

****Vendor registrations include a table top display throughout the event.

Payment

Check Enclosed

Charge my MasterCard or Visa Card

Credit Card Number _____

Expiration Date of Card _____ Cardholder's Signature _____

Return this form to the Association for Accounting Administration by:



See reverse side for hotel reservation form



Mail:
136 S. Keowee St.
Dayton, OH 45402



Phone or Fax:
937-222-0300
Fax: 937-222-5794



Email:
aaainfo@cpaadmin.org
or online at www.cpaadmin.org

hotel registration form



All educational events will take place at the DoubleTree Paradise Valley Resort in Scottsdale. **Reservations received after May 20, 2005, will be accepted on a space availability basis at the group rate.** AAA's preferred rate is \$79 per night per room for single occupancy or double occupancy plus applicable taxes (currently at 7.7%). The group rate has been extended three days pre and three days post the event for those wishing to spend a few days in the Scottsdale/Phoenix area.

1. Attach your business card or print your complete address on the form below. A confirmation will be sent to you directly from the Association within three weeks after receipt of this form.
2. Indicate your choice of accommodations. All changes should be made directly with the Association for Accounting Administration's office.
3. Mail or fax the form with a credit card number for guarantee purposes to the AAA National Office. One night's accommodations will be charged as a deposit. Deposits are refundable if AAA is notified of any cancellations at least 96 hours in advance of arrival date.

Please print or attach a business card:

Name _____

Firm _____

Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____

Indicate your reservation choice:

Single Double – Share With: _____

Occupant(s) _____

Arrival Date _____ Departure Date _____

Smoking Non-Smoking Would like a roommate *(a member of the AAA staff will contact you prior to rooming)*

Special Requests _____

Guarantee method:

Check Enclosed Charge my: American Express Discover Master Card Visa Carte Blanche

Card Number _____

Expiration Date _____ Cardholder's Signature _____

Return this form to the Association for Accounting Administration by:

Mail: 136 South Keowee Street, Dayton, OH 45402

Phone: (937) 222-0030

Fax: (937) 222-5794

Email: at aaainfo@cpaadmin.org

or on-line at www.cpaadmin.org

2005 National Symposium

June 21 - 24, 2005

See registration form to register for the event.



Attention non-members:



multiply your resources by joining today!

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

If you are NOT already a member of AAA...

Please visit our Web site for details on member benefits, programs and activities - www.cpaadmin.org. Check the box below, and we'll send you a packet of information, including a membership brochure and application.

Please send me membership information.

Name _____

Company _____

Mailing Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____ Email _____

If you are an AAA member...

Please encourage your colleagues to join, too. We'll send membership and Symposium information to them for you, or we can send materials for you to distribute.

Please send membership and syposium information to:

Name _____

Company _____

Mailing Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____ Email _____

Please send me _____ membership brochures and _____ Syposium brochures.

Name _____

Firm _____

**Mail or fax this form or
contact us by telephone at**

AAA • 136 So. Keowee Street • Dayton, OH 45402

(937) 222-0030 • Fax (937) 222-5794

Some of AAA's Benefits

- On-line searchable membership directory
- Member-to-member surveys
- Bi-monthly electronic newsletter
- Local and regional chapters
- Educational events
- Publications
- Resource bank and lending library
- Group purchasing program



Catching Opportunities

REGISTER TODAY!

www.cpaadmin.org

◆ The **AAA National Symposium, from June 21 - 24, 2005**, offers a unique opportunity to develop the knowledge and competencies you will need to maximize your firm's potential. As the profession is growing smaller, faster and more competitive every day, those managing accounting practices must be prepared for critical change.

◆ The Symposium will provide a dynamic program that will help you achieve sustained excellence and be your very best both professionally and personally. Set in Scottsdale, Arizona at the DoubleTree Paradise Valley Resort, you'll be afforded many great experiences including education, networking, sightseeing, and more!

◆ The program schedule runs from Wednesday morning through noon Friday, providing an opportunity to earn up to 19 hours of CPE. Highlighting the management, marketing, administration, human resource, and technology issues affecting firms, the Symposium is recognized as the complete educational resource for professionals managing accounting practices.



Association for Accounting Administration
136 South Keowee Street
Dayton, OH 45402

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