

# TOPICS

## Server Virtualization:

### A Group Look into the Latest Trends Dealing with Virtualization

This session will update attendees on the latest virtualization technologies and trends as well as explain what Microsoft, VMare, and Citrix are doing in the space. A highlight of the session will be collaborative discussion on the pros and cons of the platform.

## CPA Firm Software Roundup

This session will include a review of the current software offerings available to automate your firm. We'll look at what's new from the traditional CPA software vendors, as well as many of the various utility applications. Be prepared to share your firm's experience with various software solutions and vendor services.

## Developing Your Firm's Portal Strategy

In this session we will review the nature of CPA firm portal technology, the potential impact on your firm and how to go about developing a portal strategy that is aligned with your firm's service offerings. Bring your questions about how to develop a portal for your firm's clients.

## Cloud Computing:

### One of the Most Talked About Buzz Words in the Industry

Is cloud computing justified? This session will provide an update about industry happenings and attendees will be encouraged to chime in with one another on their thoughts regarding the value of cloud computing. The presentation will include the transition of technology as well as the landscape of the industry. Cloud computing will be defined and the relevancy of it to CPA firms will be explained.

## Information Privacy Regulations — What You Should Know

This session will provide an overview of what you should know about information privacy regulations that affect your firm. We will also discuss what steps you should take to make sure your firm is in compliance. The role of SAS70 audits will also be reviewed.

## Security:

### Have You Ever Really Considered What Risks Your Firm Has Related to Security?

Join us for an informational session on the security challenges facing our industry. The top 10 security concerns for a CPA firm will be discussed along with recent examples of security incidents and the outcomes. Attendees will leave with a plan of action to increasing your firm's security.

## Discussion Forums

These moderated sessions will include timely topics for those with an IT focus such as hardware, software, vendor options, security trends, policies and best practices. Forums will be broken into groups by firm size to provide a focused and relevant exchange of information and solutions.

# SPEAKERS

## Jim Fahey, Information/Project Director, Hill, Barth & King LLC

Jim Fahey is the Information/Project Director for Hill, Barth & King LLC, a top 100 CPA firm with offices in Ohio, Pennsylvania and Florida. He is Past President of the Ohio Chapter of the Association for Accounting Administration and a member of the Ohio Society of CPA's Technology Committee. Jim has written several articles for accounting industry publications and has led CPE seminars on various technology topics. He is a contributing author of the Management of an Accounting Practice Handbook. Jim has over 19 years of experience in public accounting as a firm administrator and network administrator.

## Robert Frazier, Business Development Manager, Xcentric

Robert Frazier has over 26 years of experience in the technology industry and currently serves as Business Development Manager at Xcentric. Xcentric specializes in IT solutions and certified networks for CPA firms. Xcentric helps CPAs leverage and use technology for strategic and operational advantage. Prior to joining Xcentric, Robert served as IT Director for Horne LLP, a top 50 accounting firm, and has served as a technology advisor to the CPA marketplace and the accounting software industry. Robert has worked in the accounting, healthcare, insurance, construction, bulk transport, communications and education industries; focusing on IT consulting, operations, strategic planning, and team-building.

## John Higgins, CPA.CITP, Strategic Advisor, CPA Crossings, LLC

John serves as a strategic adviser to CPAs and the CPA profession in the planning and deployment of effective technology solutions. As a principal at CPA Crossings, John specializes in facilitating the development of strategic technology plans, paperless workflows, client portal solutions and a comprehensive digital practice model. He has authored and presented CPE programs for thousands of CPAs over the past 26 years on technology and practice management issues. John is a pioneer in the development and delivery of web based CPE programs. He has presented "live" web CPE events for groups as large as 600+ participants, as well as many small groups. John assisted the Michigan Association of CPAs as an adviser in the development of their web based CPE model is a past chair of the Association. John was the former national consulting partner with a top 10 CPA firm, is a former CEO of a technology and consulting firm and is a member of the AICPA Business & Industry Hall of Fame among other industry achievements and qualifications. John's primary qualification is his passion for helping CPAs achieve greater success by leveraging technology.

## Chris James, Co-Founder, Xcentric

Chris is a seasoned veteran, having worked in the technology industry for the past 11 years. He has a business degree from Texas Wesleyan University and was the former Director of Technology for the Boys & Girls Clubs of Greater Fort Worth. He moved to the Atlanta area in 2000 after selling his first business, Covenant Systems and was the lead technology engineer at CPA Systems prior to starting Xcentric. Chris has multiple technology competencies and speaks regularly at CPA Conferences about technology.



AAA 2010 Technology Fly-In participants will be able to identify and use:

- New resources that will help you leverage your time more effectively
- New applications and knowledge to address today's technology challenges at CPA firms
- Specific solutions and best practices in the area of IT

Course limited to first 50 registrants

## Location

Hyatt Regency O'Hare  
9300 West Bryn Mawr Ave.  
Rosemont, IL 60018  
Phone: (847) 696-1234  
Website: www.hyatt.com  
Room Rate: \$149/night for  
single or \$174/night for double



occupancy. Attendees should contact the hotel directly for room reservations. The room block is under the name AAA. Rooms made after April 10, 2010 will be subject to availability.

## CPE Information

Level of Knowledge: Intermediate  
Advance Preparation: None  
Available CPE Credit: 14.5 hours  
Field of Study – Specialized Knowledge and Applications



The Association for Accounting Administration is registered with the National Association of State Board of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Website: www.nasba.org.

## Fees: Fees: \$495

Fees include all course materials and published meal and networking events.

## Cancellation Policy

"No-shows" will forfeit 100% of the registration fee. In addition, any hotel cancellation penalties will be the responsibility of the registrant. Cancellations received on or after April 15, 2010 will not receive a refund. Cancellations received prior to April 15, 2010 will receive a refund less a \$50 cancellation fee. Registrations are transferrable. For more information regarding course administrative policies such as complaint or refund, contact AAA at (937) 222-0030.

## Registration



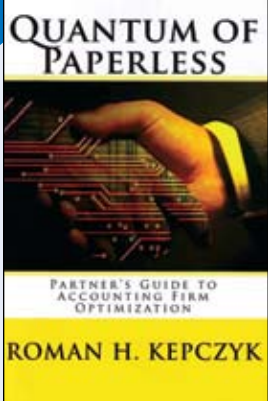
**On-Line Option:** You may submit your registration form through the AAA Website at [www.cpaadmin.org](http://www.cpaadmin.org).



**Mail Option:** If you prefer to mail your registration with a check (or credit card information), complete the registration form on the Website, print and mail to AAA, 136 South Keowee Street, Dayton, Ohio 45402.



**Fax/Telephone Option:** You may fax or call your registration into the AAA headquarters with your Visa, MasterCard or American Express information to (937) 222-0030 or fax (937) 222-5794.



All participants will receive a copy of *Quantum of Paperless: A Partner's Guide to Accounting Firm Optimization* by Roman H. Kepczyk

## Tuesday, May 11, 2010

9:30 a.m. – 10:00 a.m.	Check-in and Networking
10:00 a.m. – 11:30 a.m.	<b>Introductions</b>
11:35 a.m. – 12:25 p.m.	<b>CPA Firm Network Administration Strategy</b> <i>By Robert Frazier, Xcentric</i>
12:30 p.m. – 1:30 p.m.	Lunch
1:30 p.m. – 3:10 p.m.	<b>Server Virtualization: A Group Look into the Latest Trends Dealing with Virtualization</b> <i>By Chris James, Xcentric</i>
3:10 p.m. – 3:25 p.m.	Refreshment Break
3:25 p.m. – 4:20 p.m.	<b>CPA Firm Software Roundup</b> <i>By John Higgins, CPA Crossings</i>
4:20 p.m. – 5:10 p.m.	<b>Developing Your Firm's Portal Strategy</b> <i>By John Higgins, CPA Crossings</i>
5:10 p.m. – 6:00 p.m.	<b>Cloud Computing: One of the Most Talked About Buzz Words in the Industry</b> <i>By Chris James, Xcentric</i>
7:00 p.m.	Group Dinner Local restaurant (optional event with equal share billing) Meet in lobby at 6:45 p.m.

## Wednesday, May 12, 2010

7:30 a.m. – 8:00 a.m.	Continental Breakfast and Networking
8:00 a.m. – 8:50 a.m.	<b>Discussion Forum</b> <i>Led by Jim Fahey, Hill, Barth &amp; King LLC</i>
8:50 a.m. – 9:40 a.m.	<b>Information Privacy Regulations – What You Should Know</b> <i>By John Higgins, CPA Crossings</i>
9:40 a.m. – 9:55 a.m.	Refreshment Break
9:55 a.m. – 11:35 a.m.	<b>Security: Have You Ever Really Considered What Risks Your Firm Has Related to Security?</b> <i>By Chris James, Xcentric</i>
11:35 a.m. – 12:30 p.m.	Lunch
12:30 p.m. – 3:00 p.m.	<b>Discussion Forum</b> <i>Led by John Higgins, CPA Crossings, Robert Frazier and Chris James, Xcentric and Jim Fahey, Hill, Barth &amp; King LLC</i>
3:00 p.m.	Fly-In Wrap Up

## Association for Accounting Administration

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