THE OHIO SOCIETY OF CPAs

[Program Guide]

!MPACT

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OHIO ACCOUNTING SHOW CLEVELAND

Oct. 21-22, 2015

!MPACT

WIRELESS INTERNET ACCESS

Wireless Internet access is available throughout the session rooms and exhibit hall.
The wireless network name is: OSCPA
Password: Policy2015

[Your Career]

DELUXE BREAKFAST WITH A DEMO

Join the Intuit Tax Online Product Management Team on Day two at 7:00 a.m. for a hot breakfast and to see a demonstration of how Intuit Tax Online can help you streamline your tax workflow.

2015 Cleveland Accounting Show - ask the experts

ASK THE COACH

Register for a FREE 60-minute Q&A session with ***Janice Worthington, MA, CPRW, JCTC, CEIP,*** president, or ***Jeremy Worthington, CARW, CCTC,*** vice president, of Worthington Career Services. You'll have the opportunity to ask them questions on how to take your career to a higher level.

The 60-minute, private sessions are available both days. Stop by the OSCPA Center to register for an appointment and learn more about how to succeed.

DO YOU KNOW YOUR SOCIAL SECURITY OPTIONS?

Marc Kiner and Jim Blair of Premier Social Security Consulting, LLC are offering free consultations to show attendees. To schedule an appointment in advance, please visit www.ssa.gov to download your SS benefit statement and send it to mkiner@mypremierplan.com. Consultants are available hourly during networking breaks. On-site registration is also available. Visit Premier Social Security Consulting, LLC at booth #9 for additional information.

[Your Organization]

EXHIBIT AREA

Find cutting-edge solutions and ideas for your professional business needs from our many exhibitors. Whether you need tax research, leadership training, payment processing, insurance, or investment planning, the exhibit area is the place to be! Bring plenty of business cards to share as you check out the latest technologies, products and services available.

WIN GREAT PRIZES AS YOU BROWSE THE VENDORS!

- A **Pebble Smartwatch and $100 VISA gift card** sponsored by Premier Social Security Consulting, LLC!
- A **FREE copy of Office Professional 2013** courtesy of Microsoft and BCG Systems, Inc.
- Visit CompManagment and complete an AC-3 form for your chance to **win tickets to the OSU v. Minnesota football game** on Nov. 7.
- A Fibit activity tracker, compliments of Robert Half.

VISIT COMPMANAGMENT
and fill out an AC-3 form for your chance to win tickets to the **OSU v. Minnesota football game** Nov. 7.

ATTENDEE BREAKFAST

Arrive early on Wednesday, Oct. 21 and Thursday, Oct. 22 to register and enjoy a continental breakfast. Take this time to network and get ready for a day of rewarding CPE.

MEALS AND SNACKS

Wednesday, Oct. 21
Exhibit area open: 7:00 a.m. – 3:00 p.m.
Registration and Breakfast: 7:00 a.m. – 8:25 a.m.
Lunch: 12:15 p.m. – 1:30 p.m. *Co-sponsored by Oswald*

Thursday, Oct. 22
Exhibit area open: 7:00 a.m. – 2:15 p.m.
Registration and Breakfast: 7:00 a.m. – 8:25 a.m.
Lunch: Noon – 1:00 p.m. *Co-sponsored by Oswald*

HOW DOES THE SOCIETY TRACK MY CPE?

You have the opportunity to earn up to 8 credits per day. A double-sided CPE reporting form is located in your registration packet. Turn in your reporting form at the completion of the conference or your credit will not be tracked. Mailed or faxed forms WILL NOT be accepted. Collection boxes will be located at registration and the session hallway. Visit the registration desk if you would like a duplicate form for your records.

WHERE IS MY EVENT EVALUATION FORM?

The Ohio Society of CPAs uses Survey Monkey to collect participant evaluations and comments for its programs. You will receive an email from the Society after the show with a link to the online survey.

THE CINCINNATI ACCOUNTING SHOW IS DESIGNED FOR ATTENDEES TO RECEIVE 300 MINUTES OF CLASSROOM TRAINING PER DAY.

If you leave even 10 minutes early, you could forfeit as much as 2 credits for the day. When you attend 50 minutes of classroom training, you are awarded 1 credit of CPE. When you reach 300 minutes of classroom training a day, you are automatically awarded 8 credits. The Accountancy Board of Ohio is “gifting” you the 2 additional credits to bump you from 6 credits to 8 for attending all 300 minutes for the day.

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2015 Cleveland Accounting Show

[Your Customers]

OSCPA CENTER

The OSCPA Center is a great place to ask questions about your transcript, update your information, register for upcoming events, renew your membership and more as you check out the latest CPE opportunities and other programs OSCPA has to offer.

STAY CONNECTED TO THE OFFICE

Wireless Internet access is available throughout the exhibit area and the meeting space. The wireless network name is: OSCPA, password: Policy2015.

WIN GREAT PRIZES

Use the game piece in your registration packet and visit exhibitors throughout the show for a chance to win great prizes from OSCPA and the exhibitors or the **grand prize Pebble Smartwatch and $100 VISA gift card sponsored by Premier Social Security Consulting, LLC!**

CLAIM YOUR PRIZE

Winners may claim prizes at the OSCPA Center or prize sponsor table. Winners will be drawn during lunch on Oct. 22. Exhibitor prizes must be picked up at the exhibitor table before the close of the exhibit area at 2:15 p.m. If prizes are not picked up at the close of the exhibit area, exhibitors will mail the prizes or leave them with OSCPA. Winner information will be posted at the OSCPA Center.

Oct. 21 - Schedule

TRACK SPONSOR SALING SIMMS ASSOCIATES

	TAX	TECHNOLOGY	CORPORATE	FINANCIAL PLANNING
8:15–9:15 a.m.	**1: Municipal Tax Update: The Good, the Bad and the Ugly** TX *Adam Garn, JD, CPA, MT, attorney, Zaino Hall & Farrin, LLC* • Get up-to-speed on what to expect in 2016 and beyond. • Find out how the changes may impact your organization or your clients. • Discuss recent case law. **Ballroom**	**2: Windows 10** SK *Robert Coppedge, MCITP, MCTS, MCT, CEO, Simplex-IT* • Examine the key reasons why you should (and shouldn't) upgrade to Windows 10. • Learn Microsoft's strategy in terms of software, services and licensing. • Explore what's new with Windows 10 and what makes it more important than previous versions. **Room 19/20**	**3: What It Takes to Bring New Business Investment to Ohio** SK *Jay Foran, senior vice president, Team Northeast Ohio* • Understand the key factors companies consider when selecting a location. • Investigate the location strengths and weaknesses of Northeast Ohio. • Learn strategies to cultivate a location opportunity and help create new jobs for the region. **Room 19/20**	**4: Will They or Won't They? Economic Outlook for 2015 and Beyond** SK *Jim Saling CIMA, CPWA, president, Saling Simms Associates* • Examine the short- and long-term economic landscape. • Understand the new positions of the Federal Reserve. • Prepare for long-term threats to the economy. **Room 19/20**
9:50–10:50 a.m.	**8: Tax Controversy: Dealing With the IRS** TX *Jeffry Erney, JD, partner and Michelle Hervey, JD, partner, Baker & Hostetler LLP* • Understand how to respond to the IRS effectively on behalf of your clients. • Explore tips for finding the answer when the IRS isn't responding. • Learn strategies in negotiating installment agreements and offers in compromise. **Ballroom**	**9: Getting Clients to Say 'Yes' to Cloud Applications** SK *Judith McCarthy, owner, Think Beyond the Desktop* • Explore the advantages cloud computing has for your clients' businesses. • Learn how to address client concerns regarding the transition. • Identify tips for getting clients excited about making the change. **Room 19/20**	**10: Ohio Small Business Tax Update** TX *Debora D. McGraw, JD, LLM, CPA, member, Zaino Hall & Farrin LLC* • Examine common misconceptions about the small business deduction. • Discuss the practical implications of municipal income tax reform. • Explore common audit controversies. **Room 19/20**	**11: Four Dimensional Investing** SK *Jim Saling CIMA, CPWA, president, Saling Simms Associates* • Review the main components of four dimensional investing. • Learn the value of the components for individual investors. • Apply the components to help you or your client reach investing goals. **Room 19/20**
11:15-12:15 p.m.	**15: Sales & Use Tax in Ohio** TX *Joe Popp, tax manager, Rea & Associates, Inc. and Brandon Houk, director of accountant programs, Avalara* • Discuss sales and use tax legislation and the compliance environment in Ohio. • Explore how exemptions apply to the oil and gas industry and how they differ from normal sales and use tax rules. • Understand examples for which projects, material, and processes qualify for exemption. **Ballroom**	**16: Skype for Business: Leverage a New Level of Collaboration** SK *Ken Kilka, director, networking solutions, BCG Systems, Inc.* • Review the biggest changes resulting from Lync moving to Skype for Business. • Understand how you can get even more out of Office. • Learn how you can control what your users will see, collaborate with current users, and call real phone numbers. **Room 19/20**	**17: Affordable Care Act: Reporting Forms 1094-C and 1095-C** TX *Dave Petno, CHRS, broker/consultant, Accelerated Benefits* • Understand employer IRS reporting requirements. • Learn the required coding for IRS tax forms 1094-C and 1095-C. • Discuss employer penalty liability, taxes and fees. **Room 19/20**	**18: Saving Your Business Through a Divorce: Not Just About the Money** SK *Manu Raj, Esq, partner, Reith Antonelli & Raj* • Learn about business valuation and tax codes and discuss the "emotional estate" loss. • Examine all ramifications on the business besides profit and loss. • Review the loss of productivity and marketability of the company. **Room 19/20**
12:15-1:30 p.m.	**Lunch**			
1:20–2:20 p.m.	**22: The Essential Corporate Tax Update** TX *Mark Patrick, CPA, Packer Thomas CPAs and Business Consultants* • Review corporate federal tax developments significant to CPAs serving businesses. • Take home practice aids, checklists, examples, new forms, etc. • Discuss new tax laws, regulations, procedures and court decisions that affect businesses. **Ballroom**	**23: QuickBooks Online Accountant – Moving Your Practice to the Cloud** SK *Deborah Defer, Advanced Certified QuickBooks ProAdvisor, senior manager, BDO USA, LLP* • Explore key features of QuickBooks Online Accountant. • Understand how new functionality can benefit you. • Review useful third party applications. **Room 19/20**	**24: Exit Strategies for Private Business Owners** SK *James Aussem, JD, AEP, shareholder, Cavitch Familo & Durkin Co., LPA* • Examine the tax consequences of the deal structure and the historic accounting and tax information in the planning process. • Discuss techniques to handle when the business is passed on to the next generation or sold. • Compare historically popular strategies with alternatives. **Room 19/20**	**25: Mastering Financial Aid to Increase Your Business** SK *Kelly MacLean, president, College Recruiting Specialists* • Learn how to leverage financial aid to increase your client base. • Review important FAFSA details to help your clients maximize their grant opportunities. • Explore resources to help you build a stronger relationship with your clients. **Room 19/20**
2:45–3:45 p.m.	**29: Federal Tax Update – Individual: Essential News for Tax Practitioners** TX *Mark Patrick, CPA, Packer Thomas CPAs and Business Consultants* • Review federal tax developments significant to CPAs serving individuals. • Hear a "plain English" analysis and commentary on new tax laws, regulations, procedures and court decisions that affect individuals. • Take home practice aids, checklists, examples, new forms, etc. **Ballroom**	**30: What's New in QB 2016** SK *Dawn Brolin, CPA, MSA, managing member, Powerful Accounting, LLC* • Explore the newest features in QuickBooks Desktop 2016. • Discuss how these features will save you time and help you work more profitably with your client's files. • Learn how the new features can help your clients work more efficiently and effectively with their accounting system. **Room 19/20**	**31: Health Care Reform: Strategic Cost-Saving Options in an Evolving Marketplace** SK *Cindy Bowman, vice president, senior client executive, group benefits, and Andrea Esselstein, JD, Oswald Companies* • Explore the challenges and opportunities facing employers. • Discuss initiatives for engaging employees. • Learn next steps in executing a comprehensive strategy and cost-saving options. **Room 19/20**	**32: Ways to Effectively Use a Power of Attorney** SK *Enos Stewart, CPA, JD, principal, McCarthy, Lebit, Crystal & Liffman Co, L.P.A.* • Review the types of powers of attorney. • Discuss the limitations of each type. • Learn how to minimize risk when using powers of attorney. **Room 19/20**

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	ASSURANCE SERVICES/A&A	POTPOURRI	GENERAL/ETHICS
8:25-9:25 a.m.	**5: Top 10 Risks Identified by CFOs in 2015** AA *Leah Donti, CMA, MBA, founder and president, Advantage Montreal Seminars Inc.* • Explore the top 10 risk issues identified by CFOs this year. • Review strategies to mitigate these risk areas. • Identify and learn how to apply solutions to complex business issues. Room 19/20	**6: How to Get Hired and Promoted** SK *Janice Worthington, MA, CPRW, JCTC, CEIP, president, Worthington Career Services* • Understand how brand neglect leads to career disaster. • Explore ways to control perceptions of you as a professional. • Learn how to conquer the interview and distinguish yourself from the competition. Room 19/20	**7: Medicare Options for Your Clients** SK *Scott Miller, president, Seniority Benefit Group* • Understand Medicare options for your clients. • Explore the basics, including options for coverage, member enrollment periods and timelines, plus estimated costs. • Review Medicare Part D and a checklist for turning 65. Room 19/20
10:00-11:00 a.m.	**12: Applying the New Revenue Standard to Key Industries** AA *Leah Donti, CMA, MBA, founder and president, Advantage Montreal Seminars Inc.* • Explore how the new revenue recognition standard will impact different industries. • Understand which industries will be impacted most by the changes in revenue measurement. • Find out how to prepare for these important changes. Room 19/20	**13: Legislative Update** TX *Barbara Benton, CAE, vice president, governmental affairs, The Ohio Society of CPAs* • Examine the latest developments in state tax reform. • Find out what hot issues in Washington could impact Ohio businesses. • Discuss how Ohio Accountancy Board changes impact your CPA license. Room 19/20	**14: Social Security Basics and Advanced Planning Strategies – Part 1** SK *Marc Kiner, CPA, NSSA®, Social Security educator, Premier Social Security Consulting, LLC* • Learn the three-legged stool approach to helping clients to maximize their Social Security benefits. • Help clients coordinate spousal benefits. • Prepare for the questions clients are asking about Social Security. Room 19/20
11:30-12:30 p.m.	**19: Recent Developments From the Private Company Council to Simplify U.S. GAAP** AA *Leah Donti, CMA, MBA, founder and president, Advantage Montreal Seminars Inc.* • Examine how the Private Company Council has helped simplify U.S. GAAP for private companies. • Explore new FASB pronouncements that have been approved and issued in the last 12 months. • Understand how these measures provide relief for private companies. Room 19/20	**20: Why Fraudsters Commit Fraud?** AA *Anthony LaNasa, CPA, CFE, principal, HW&Co.* • Examine fraudster motivations through case studies. • Learn how to begin a business risk assessment. • Explore techniques for cutting fraud risks. Room 19/20	**21: Social Security Basics and Advanced Planning Strategies – Part 2** SK *Marc Kiner, CPA, NSSA®, Social Security educator, Premier Social Security Consulting, LLC* • Learn more about helping clients maximize their Social Security benefits. • Review surviving spouse benefits and the importance of these funds in increasing value. • Discuss numerous case studies and actual client consultations and options. Room 19/20
1:30-2:30 p.m.	**26: Preventing and Detecting Accounting Fraud** AA *Dawn Brolin, CPA, MSA, managing member, Powerful Accounting, LLC* • Review strategies to help small businesses protect themselves from fraud. • Understand methods for tracking information during a fraud investigation. • Explore fraud prevention best practices in areas such as hiring and software selection. Room 19/20	**27: Update on the NFP Advisory Committee** AA *Anthony LaNasa, CPA, CFE, principal, HW&Co.* • Learn about the NFP Advisory Committee and its recent activities. • Understand key changes to nonprofit accounting and reporting. • Discuss how the proposed ASU impacts nonprofit organizations. Room 19/20	**28: Ohio CPA Professional Standards and Responsibilities** ET (1:30-4:15 p.m.) *Laura Hay, CPA, CAE, executive vice president, The Ohio Society of CPAs* • Explore practical applications of the Ohio Revised Code (ORC) and the Ohio Administrative Code (OAC) in our modern environment. • Examine the concept of ethics, ethical drift and the ethical decision-making process. • Engage in an interactive review of the licensing, ethics and independence rules that apply to Ohio CPAs. Room 19/20
3:00-4:00 p.m.	**33: After the Fraud, What Comes Next** AA *Robert Torok, CPA, ABV, CVA, CFE, CFF, director, McGladrey, LLP* • Discuss the different phases that happen after fraud has been discovered or alleged. • Walk through the follow-up process, from engagement letters, interviews, analysis, writing the report and presenting the findings. • Review prevention and preparation tips. Room 19/20	**34: An Overview of the New Federal Uniform Grant Guidance** SK *Michael Muniak, CPA, principal, HW&Co.* • Understand how the Uniform Grant Guidance will streamline processes, ease administrative burden and strengthen oversight. • Review subparts A through F of the "Super Circular." • Discuss the three main categories, including administrative requirements, cost principles and audit requirements. Room 19/20	

Oct. 22 - Schedule

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	TAX	FIRM DEVELOPMENT	CORPORATE	PFS/FINANCIAL PLANNING
8:00–9:00 a.m.	**35: Federal Tax Update – Individual: Essential News for Tax Practitioners** TX (repeat of session 29) *Mark Patrick, CPA, Packer Thomas CPAs and Business Consultants* • Review federal tax developments significant to CPAs serving individuals. • Hear a "plain English" analysis and commentary on new tax laws, regulations, procedures and court decisions that affect individuals. • Take home practice aids, checklists, examples, new forms, etc. **Ballroom**	**36: Running Your Accounting Practice With a Remote Workforce** SK *Dawn Brolin, CPA, MSA, managing member, Powerful Accounting, LLC* • Learn how to strategically set up a practice using the most current technologies. • Explore best practices for better time management, processes and procedures. • Review communication strategies to maximize efficiency. **Room 19/20**	**37: Is Your Employee Benefit Plan ERISA Compliant?** AA *John Wain, CPA (inactive), principal/ owner & benefits advisor, The Alpha Group Agency, Inc.* • Gain a better understanding of the ACA requirements as they pertain to the DOL reporting. • Review what to expect when you are selected for a DOL audit. • Learn how to protect your organization from DOL audit fines and penalties. **Room 19/20**	**38: Charitable Giving** TX *Gary Zwick, CPA, J.D., L.L.M., partner, Walter/Haverfield, LLP* • Review the complex and strict rules related to charitable giving and receiving of donations. • Discuss answers to common client questions, whether they are donating or receiving. • Identify typical traps and learn how to avoid them. **Room 19/20**
9:30–10:30 a.m.	**42: The Essential Corporate Tax Update** TX (repeat of session 22) *Mark Patrick, CPA, Packer Thomas CPAs and Business Consultants* • Review corporate federal tax developments significant to CPAs serving businesses. • Discuss new tax laws, regulations, procedures and court decisions that affect businesses. • Take home practice aids, checklists, examples, new forms, etc. **Ballroom**	**43: The Four Corners of Firm Growth** SK *Bob Lewis, MBA, president, The Visionary Group* • Learn how to implement both organic and inorganic growth in your firm. • Explore client mining, referral partner networks and targeting prospects. • Discuss ways to develop and maintain growth strategies throughout the year **Room 19/20**	**44: Lifehacks – Using Technology to Get Things Done Easier** SK *Allen Lloyd, senior manager, board & executive operations, The Ohio Society of CPAs* • Explore how life can be easier. • Learn about data analytics, task managers, password managers and expense ropers. • Discover tools that can help you personally and professionally. **Room 19/20**	**45: Income Tax Efficient Planning for Succession in Closely Held Business** TX *Gary Zwick, CPA, J.D., L.L.M., partner, Walter/Haverfield, LLP* • Explore creative ideas to reduce income taxes when passing the torch. • Discuss answers to common client questions. • Learn techniques used by your competitors. **Room 19/20**
11:00-12:00 p.m.	**49: Retirement Plan Overview and Update** TX *Richard Naegele, JD, MA, attorney & shareholder, Wickens Herzer Panza Cook & Batista* • Review recent changes impacting retirement plans. • Cover recent cases on fiduciary requirements to monitor plan fees and investments and changes in the IRS determination letter program. • Discuss service provider and participant fee disclosure requirements. **Ballroom**	**50: What Goes Wrong in a Business Development Campaign?** SK *Bob Lewis, MBA, president, The Visionary Group* • Learn how to be viewed as a valued trusted advisor and not a commodity. • Understand the three reasons why prospects switch accountants and what the biggest buying signal is. • Explore the steps of a business development campaign. **Room 19/20**	**51: Gain Traction in Growing a Business Through Strategic Planning** SK *Jeffrey C. Susbauer, Ph.D., president, Growth Strategies, Inc.* • Discuss the importance of determining company values • Understand how company values tie to building goals and plans. • Learn step-by-step how to gain traction in achieving growth goals. **Room 19/20**	**52: It's Tax Time! Let's Talk About Business Succession Planning!** TX *Ronald Wayne, JD, partner and David Woodburn, JD, chair, trusts & estates practice group, Buckingham, Doolittle & Burroughs, LLC* • Gain tips for motivating families in closely-held businesses to acknowledge succession challenges. • Identify, confront and resolve potential business-killing blended family scenarios. • Discuss special estate planning considerations for second marriages. **Room 19/20**
12:15-1:30 p.m.	Lunch			
1:00–2:00 p.m.	**56: Repair Regulations: How to Win With Losses** TX *Ron Antal, CPA, MST, CGMA, managing director, RCG* • Learn how to navigate the tricky rules of the new repair regs legislation. • Explore the keys to maximizing the values of equipment, building systems and structural component dispositions. • Understand that new IRS rules mean potential accounting method changes and plenty of confusion. **Ballroom**	**57: Succession Planning (Onward to FL or AZ)** SK *Nobby Lewandowski, CPA, MBA, owner, Lewandowski & Company* • Examine exit strategies to maximize the value of your firm. • Discuss methods for identifying future partners. • Understand the difference between running a business and building an organization. **Room 19/20**	**58: Retirement Plan Choices** TX *Richard Naegele, JD, MA, attorney & shareholder, Wickens Herzer Panza Cook & Batista* • Discuss the IRS requirement that virtually all 401(k) plans must be restated prior to April 30, 2016. • Review the advantages and disadvantages of different types of tax-qualified retirement plans. • Understand the importance of discussing plan modifications. **Room 19/20**	**59: Trusts in Depth** TX *Missia Vaselaney, partner, Taft Stettinius & Hollister LLP* • Gain a working knowledge of the basic types of trusts and the significance of various trust provisions. • Learn about the non-tax provisions of trust documents and the different options available. • Discuss where trust planning is heading. **Room 19/20**
2:15–3:15 p.m.	**63: Ohio Tax Update** TX *Steven Dimengo, JD, CPA, MT, and Richard Fry III, JD, MT, Buckingham, Doolittle & Burroughs, LLC* • Review changes in Ohio state taxes, including sales/use tax, personal income tax, and changes in CAT sourcing receipts. • Examine changes enacted as part of Ohio's biennium budget. • Learn about various tax incentives, such as the InvestOhio credit. **Ballroom**	**64: Health & Wellness in the Workplace** SK *William Frankel, principal, director of client services, Be Well Solutions* • Examine 2016 updates to the ACA, Alternative Standards and Technology. • Discuss the direct and indirect cost of poor health and the financial toll on corporate America. • Explore methods for reducing risk factors and health care costs as a result. **Room 19/20**	**65: Save Time and Money by Understanding BWC's New Prospective Billing System** SK *Mark Clendenin, regional business development manager, Ohio BWC* • Get answers to your questions about the BWC's transition to a prospective billing system. • Discuss transition timelines and deadlines. • Examine rating plans plus grant and discount opportunities. **Room 19/20**	**66: Estate Plans of the Rich and Famous** TX *Missia Vaselaney, partner, Taft Stettinius & Hollister LLP* • Review mistakes the rich and famous have made in their estate plans (or lack thereof). • Discuss how clients making similar mistakes could fall prey to additional tax or litigation. • Learn how to correct common errors. **Room 19/20**

	ASSURANCE SERVICES/A&A	EMERGING ISSUES	GENERAL/ETHICS
8:10-9:10 a.m.	**39: Accounting Update** AA *Pete Margaritis, CPA, chief edutainment officer, The Accidental Accountant* • Discuss the new five-step approach in recognizing revenue. • Review the latest FASB projects. • Explore major developments in the profession. Room 19/20	**40: Tax Return Identity Theft: Not a Victimless Crime** TX *Fred Francis, senior accountant, Clark Schaefer Hackett & Co.* • Understand different types of tax-related identity theft. • Explore real-life cases and conclusions. • Know what to do if you or your client becomes a victim. Room 19/20	**41: Financial Exploitation of the Elderly** SK *Arvin Clar, CFE, special agent, Ohio Attorney General's Special Investigations Unit* • Understand how financial exploitation is defined. • Learn how to look for warning signs of financial exploitation of the elderly. • Discover ways to make your case that exploitation has occurred. Room 19/20
9:40-10:40 a.m.	**46: Peer Review Preparation** AA *James Gero, CPA, owner, Hobe & Lucas CPAs Inc.* • Discuss the potential impact of changes to peer review preparation standards. • Review Accountancy Board rule changes and how they differ from AICPA peer review rules. • Get answers to your peer review questions. Room 19/20	**47: When Family Cheats Family** SK *Michael Solomon, J.D., LLM, partner, Budish, Solomon, Steiner & Peck, Ltd.* • Take a practical look at the issues and solutions that occur when family members in a family business cheat other family members. • Discuss the legal rights of directors, officers and shareholders in a family business to share in the profits. • Learn how to reduce the possibility of disputes and the risk of financial abuse. Room 19/20	**48: 1031 Exchange Update – New Take on an Old Law** TX *Stephen Robison, JD, LLM, attorney/owner, Robison Law Firm* • Learn about 1031 exchanges, including what type of asset can be exchanged. • Review the newest developments in ways to exchange, including building on land owned by the client. • Discuss long term planning with 1031 exchanges. Room 19/20
11:10-12:10 p.m.	**53: Update on Standards for Reviews, Compilations, and Engagements (SSARS 21)** AA *Michael Glynn, CPA, CGMA, senior technical manager – AICPA Audit and Attest Standards* • Review new SSARS 21 requirements. • Understand how the standards apply differently for compilations vs. engagements. • Learn how to indicate that financial statements were prepared in accordance with an OCBOA, contain departures from the accounting framework, or omit substantially all disclosures. Room 19/20	**54: FBAR/FATCA** TX *Matthew F. Kadish, Esq., LLM, partner, Kadish Hinkel & Weibel* • Find out what you and your clients need to know now about FinCEN Form 114 (FBAR), foreign information returns, key international tax traps for the unwary, and the Foreign Account Tax Compliance Act (FATCA). • Explore the changing rules for foreign account reporting and disclosures. • Discuss how over 30 foreign banks have entered into non-prosecution agreements to turn over client lists and have been "blacklisted," and how the IRS is stepping up enforcement actions. Room 19/20	**55: How to Hire and Retain Great People** SK *Jerry Esselstein, CPA, business advisor, Jerry L. Esselstein Company, LLC* • Learn principles and practices to improve your hiring, retention and overall firm or company performance. • Understand the importance of strategies for hiring and retaining talented, trustworthy and trained personnel to help maximize margins, improve quality, and ensure client and market penetration. • Discuss how the quality of the personnel and their motivation and commitment determine long-term success. Room 19/20
1:00-2:00 p.m.	**60: Auditing Standards Update** AA *Michael Glynn, CPA, CGMA, senior technical manager – AICPA Audit and Attest Standards* • Explore current auditing issues for non-public entities, including audit quality and auditor reporting issues. • Learn when to use the Auditing Standards Board's (ASB) auditing standards and when to use those that PCAOB issues. • Understand how you should consider going concern in light of the revised accounting standards. Room 19/20	**61: Are You Ready for a Web-Based Business?** SK *Guy Pearson, CA, CEO, Practice Ignition* • Examine the business impact of small business moving to the cloud. • Explore vertical solutions and tools for key industries, such as trades, stock-based businesses and retail. • Improve data accuracy and your ability to be forward thinking with your clients. Room 19/20	**62: Professional Standards and Responsibilities – Ethical Shifts: Interpretations & Actions** ET (1:00-3:45 p.m.) *Jerry Esselstein, CPA, business advisor, Jerry Esselstein LLC* • Set and manage ethical expectations in all aspects of your career while fulfilling the ABO's professional standards requirement. • Improve your understanding of how societal shifts in moral and ethical behavior are changing systems and processes, and impacting decision making in business today. • Integrate ethical concepts and crosschecks into your training, auditing, tax, and financial reporting procedures. Room 19/20
2:30-3:30 p.m.	**67: Hot Topics: Employee Benefit Plan Audits** AA *Michelle D'Amico, senior manager, assurance practice, and Kimberly Flett, compensation and benefits services senior director, BDO USA, LLP* • Understand the current Department of Labor (DOL) focus areas for both auditors and fiduciaries of employee benefit plans. • Explore new DOL enforcement initiatives. • Discuss results of the recently issued Employee Benefit Security Administration Audit Quality Study. Room 19/20	**68: Creating YOUR High Growth Practice Using the Cloud** SK *Guy Pearson, CA, CEO, Practice Ignition* • Explore the ways cloud software and data automation have made it easier to obtain and turn accurate data into valuable insights. • Discuss pricing, marketing and services that you can offer clients to turbocharge your practice and lift your growth rates. • Remove admin costs and wasted time at your practice to boost profitability and scalability with new cloud software suites. Room 19/20	

Exhibitors provide valuable business solutions

Take time during the show to visit with our many exhibitors. They offer a wide range of business services and solutions designed to help you grow your business. Drop off your business card for chances to win prizes. Complete the OSCPA game piece, found in your registration packet, to win many great prizes from exhibitors and OSCPA, including a **Pebble Smartwatch and $100 VISA gift card** sponsored by Premier Social Security Consulting, LLC!

Accounting Practice Sales – Table 3

Steve Weldon | steve@APSmidwest.com | (800) 272-7355
Mike Sosinski | mike@APSmidwest.com | (800) 272-7355
www.accountingpracticesales.com

Accounting Practice Sales specializes in the sale of CPA firms and accounting and tax practices. Our marketing and consulting services are focused exclusively on the accounting professional. We provide guidance and assistance in selling your practice, merging with another firm, establishing a practice continuation plan, growing an existing business or acquiring a new practice.

ADP – Booth 15

Avalara – Booth 38

Brandon Houck | Brandon.houck@avalara.com | (206) 826-4900 x1571
www.avalara.com

Avalara helps businesses achieve compliance with sales tax, excise tax, VAT and other transactional tax requirements. Our platform manages complicated and burdensome tax compliance obligations imposed by state, local, and other taxing authorities in the United States and internationally.

BCG Systems, Inc. – Booth 50 & 51

Mike Kowalski | Mike.Kowalski@BCGSystems.com | (800) 968-6661

BCG Systems, Inc. is a single-source provider of business management software, hardware, and infrastructure. In short, we get rid of IT headaches. As a Gold-Certified Microsoft and NetSuite partner, we strive to help our clients increase efficiencies, decrease costs and drive a lasting competitive advantage through technology and trusted advice.

Becker Professional Education – Booth 29

Sharon German | sgerman@becker.com | (888) 350-1675
Karen Diercks | kdiercks@becker.com | (513) 575-2385
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Brunswick Companies – Booth 40

Gayle Haase | ghaase@brunswickcompanies.com | (330) 865-4233
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Buckeye Community Bank – Booth 18

Business Leadership Solutions – Booth 11

Tony Gay | Tony.Gay@businessleadershipsolutions.com | (513) 478-0596
www.businessleadershipsolutions.com

Business Leadership Solutions, Inc. focuses on high-performance leadership development, team development, and business growth. These objectives are reached through customized training, coaching, and consulting services. We are focused on moving organizations from average to high-performance, and moving revenue from flat or declining to consistent growth.

Canton/Stark County CVB and Rock and Roll Hall of Fame – Booth 2

Mary Vlahos | MaryV@VisitCanton.com | (800) 552-6051
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Citrix ShareFile – Booth 7

Fletcher Martin | fletcher.martin@citrix.com | (919) 745-6203
www.sharefile.com | http://sf-mktg-pages.sharefile.com/OhioSocietyCPA-Trial.html

Citrix ShareFile is a file-sharing tool that helps people exchange large files easily, securely and professionally. Built specifically for business, ShareFile offers security for data transfer and storage, customized usage and branding solutions, award-winning customer service, and mobile apps and tools that allow you to easily access and share files from any device—anytime, anywhere.

CompManagement, Inc. – Booth 5

Adam Rice | Adam.Rice@sedgwickcms.com | (614) 376-5686
www.compmgt.com

CompManagement, Inc. is OSCPA's third party administrator for workers' compensation specializing in alternative rating programs, claims management, safety & loss control, and unemployment consultation. Through our program consultation, use of cost containment strategies and best practices, and the expertise of our colleagues, we annually save our clients $100 million in premiums paid.

Concerned CPA Network – Booth 24

Lynn Nichols | lynnnicholscpa@outlook.com | (800) 939-5906
Greg Schade | bschade@bright.net | (800) 939-5906
www.ohiocpa.com/my-oscpa/services/concerned-cpa-network

The Concerned CPA Network is dedicated to informing Ohio CPAs, accounting professionals, students or their peers and family members about alcohol or substance abuse problems, depression or mental illness. This program encourages affected individuals to seek help, and assists in their recovery. This is a confidential hotline dedicated to addressing substance abuse and related problems.

Cost Segregation Services – Booth 26

Drake Software – Booth 41

Loretta Newton | Loretta@Drake.us | (828) 349-9669
www.Drake.us

Drake Software, founded in 1977, has experienced substantial growth by offering experience and stability to professionals in the tax preparation industry. Our 50,000 customers can still call our support line and get a live person in less than 10 seconds and that same person can answer their question 95% of the time on the first call. Our award winning software is affordable and reliable. Experience counts!

Duffy + Duffy Cost Segregation Services, Inc. – Booth 43

Craig Miller | craig@costsegexperts.com | (440) 670-1941
www.costsegexperts.com

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e2b teknologies – Booth 19

sales@e2btek.com | (440) 342-4700
www.e2btek.com

With a long and successful history working with both CPA firms and CPAs in industry, e2b teknologies (e2btek.com) is a passionate and experienced team of industry leaders and business advisers providing high quality, uncomplicated, and innovative ERP and CRM software built on modern technology platforms with turn-key consulting and custom development services.

Hartland – Booth 26

Intuit/Quickbooks – Booth 8

QuickBooks.Intuit.com

Intuit QuickBooks makes business and financial management solutions that simplify the business of life for small businesses and accounting professionals.

Grover Rutter CPA, ABV, CVA, BVAL, Mergers, Acquisitions – Booth 4

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KBKG – Booth 22

Robert Hancock | Robert.Hancock@kbkg.com | (312) 756-7588
www.KBKG.com

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Nationwide Insurance – Booth 31

www.nationwide.com/oscpa.jsp

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Office Tools – Booth 36 & 37

sales@officetoolspro.com

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Open Systems – Booth 25

Organizational Architecture – Booth 16

Organizational Architecture is your strategic partner in the design and development of systems to attract, retain, develop, and motivate your organization's talent through sound Human Resources practices and processes. We help you with realistic solutions to help you lead your employees to the next level.

Oswald Companies – Booth 27

Rob Peirce | rpeirce@oswaldcompanies.com | (614) 744-4244
www.oswaldcompanies.com

Oswald Companies is proud to be the official insurance partner of The Ohio Society of CPAs, providing proprietary group medical, disability, life, dental, vision, professional liability and personal insurance for all members.

OSCPA On-Demand – Booth 1

Parallel Solutions – Booth 38

Keith Sherwin | keiths@erpsolutions4u.com | (440) 498-9920 ext. 178
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Paychex , Inc. – Booth 12

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www.paychex.com

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Paycor – Booth 52

Tiffany Sieve | TSieve@paycor.com | (513) 827-3514

Tara Frank | TFrank@paycor.com | (614) 396-5405

www.paycor.com

Paycor helps companies manage their people better with intuitive, cloud-based HR, payroll and timekeeping software. More than 26,000 small- and mid-sized organizations across America have chosen Paycor for personalized customer service and easy-to-use solutions that improve efficiency and enable them to focus on their strengths.

People's Bank – Table 39

Practice Ignition – Booth 13

Guy Pearson | guy@practiceignition.com | (415) 231-6566

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Premier Social Security Consulting, LLC – Booth 28

Marc Kiner | mkiner@mypremierplan.com | (513) 351-5707

www.mypremierplan.com

At Premier Social Security Consulting, our mission is to empower people to take control and maximize their Social Security benefits. Studies show more than 90% of all recipients leave money on the table as they are unaware of the options. Premier also educates advisors nationwide increasing their value to clients.

QUANTITAX – Booth 35

Research Credit Group – Booth 9

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Ruby Receptionist – Booth 23

Ashley Fisher | hello@callruby.com | (866) 611-7829
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SecuraWealth Investment Strategies – Booth 47

Jeffrey Eisenberg, MBA | jeisenberg@securawealth.com
(330) 605-2564 | www.securawealth.com

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Sequent – Booth 53

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Spooner Incorporated – Booth 6

Andy Lambach | alembach@spoonerinc.net | (440) 249-5214
http://spoonerinc.com

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TekCollect – Booth 20

Diane Schumm | diane.schumm@tekcollect.com | (614) 736-1606 x539
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The Aloha Corporation – Booth 34

Mark Ahola | mark@ahola.com | (440) 717-7620 x148
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The Ohio CPA Foundation – Booth 21

Thomson Reuters – Booth 44 & 45

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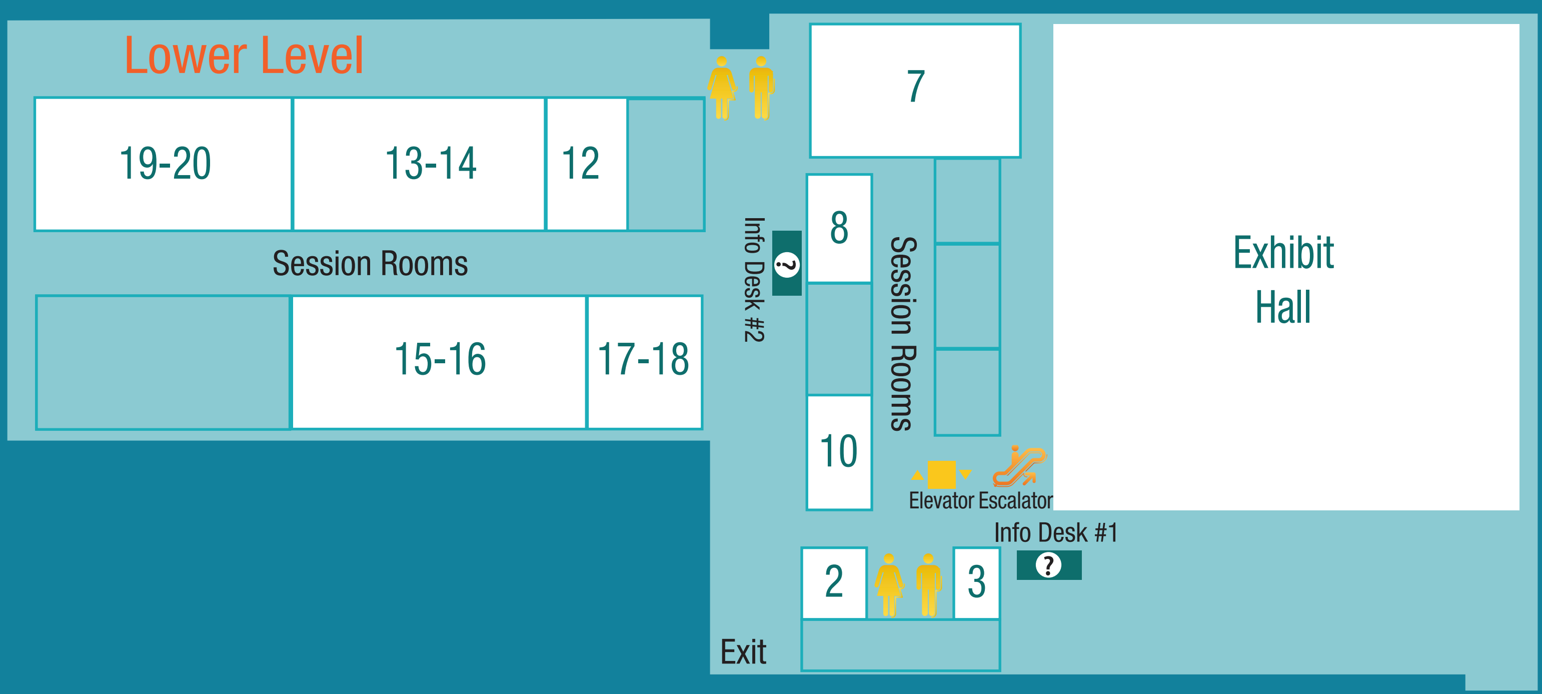
US Bank – Booth 14

Wolters Kluwer – Table 30

I-X Convention Center



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