

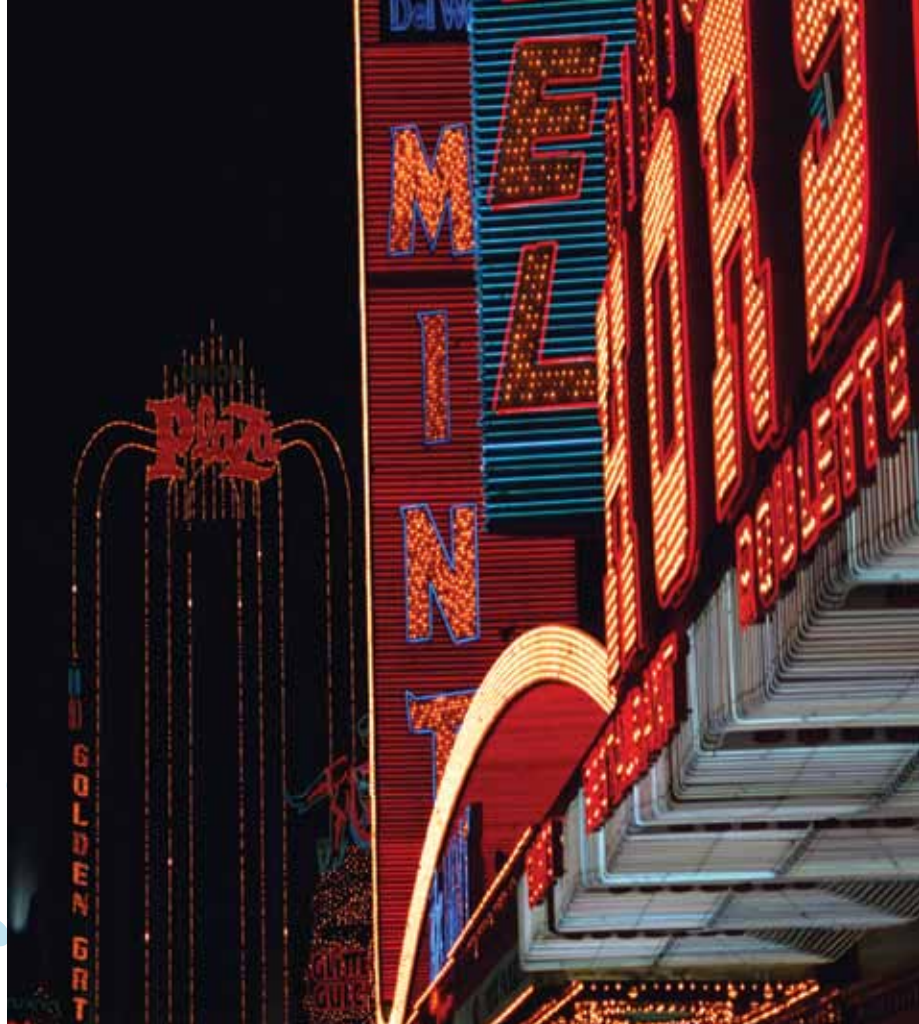
PPC AND AUDITWATCH

FROM THE TAX & ACCOUNTING BUSINESS OF
THOMSON REUTERS

MEGA-CONFERENCE WEEK
LAS VEGAS, NV

NEW! VIRTUAL CONFERENCES
FIVE EVENTS TO CHOOSE FROM

Save with Early Bird Pricing—See Inside!



HOT TOPICS AND PRACTICAL
LEARNING FROM INDUSTRY
LEADERS

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TAX & ACCOUNTING



THOMSON REUTERS™

WHY PPC AND AUDITWATCH CONFERENCES?

We offer in-depth learning at conferences created to meet the needs of professionals nationwide. We gather field experts who bring attendees the most up-to-date, relevant information regarding a variety of important topics.

NATIONALLY RECOGNIZED SPEAKERS

PPC and AuditWatch Conference presenters are superlative speakers who are hands-on practitioners at the highest level.

LEADING-EDGE CONTENT

PPC and AuditWatch Conferences give you the guidance and tools to practice more efficiently. Conference material is based on quality, time-tested PPC guidance. Sessions focus on practical application, offering attendees hands-on, real-world solutions.

OUTSTANDING ACCOMMODATIONS

Conference venues offer superior accommodations and meeting facilities, in cities across the nation. Registration cost includes excellent meals—continental breakfast, luncheon and refreshment breaks—as well as all sessions, and conference materials.

TO REGISTER

Call 800.231.1860 or visit cl.thomsonreuters.com/P

PPC AND AUDITWATCH MEGA-CONFERENCE WEEK

PPC and AuditWatch are presenting four back-to-back conferences at Caesars Palace in Las Vegas this fall. Register for two or more conferences during our Mega-Conference week and save an additional 10% off your registration! Call 800.231.1860 to take advantage of this special package pricing.

Register for more than one Mega-Conference Week event and receive 10% off!
Attend all four conferences and earn 40 CPE credits for only \$1,499!

NEW! PPC AND AUDITWATCH VIRTUAL CONFERENCES

Our two-day web-based conferences break traditional barriers by giving you live, up-to-the-minute updates on key topics from nationally recognized experts—with live streaming video—from the comfort of your own office! Each of our five virtual conferences offers multiple tracks and a variety of speakers—so you can customize your web-based, live-training experience. Just like our on-site conferences, you will have the opportunity to choose the sessions that you're most interested in. This exciting format is an interactive way to have a top-quality conference experience from any location, with no travel costs. See pages 14 – 20 for complete details.

Save 10% when you register at least 30 days prior to the event!

PPC AND AUDITWATCH 2011 CONFERENCES... YOUR TOOLS FOR SUCCESS



Dear Fellow Professional,

Welcome to our 2011 PPC and AuditWatch Conference catalog. I hope that you enjoy reading about this year's conference line-up, which includes many exciting topics taught by industry leaders that are also practicing professionals. Harold Monk, the former Chairman of the Auditing Standards Board, is back again this year, as are many of our esteemed AuditWatch speakers.

Back in 2011 is the **Mega-Conference Week in Las Vegas!** PPC and AuditWatch will host four back-to-back conferences at Caesars Palace—at huge savings to you! New to this year's Mega-Conference Week is the Small Firm Forum—a one-day conference designed to cover tax, accounting and auditing issues pertinent to small firms. Register for more than one of the conferences during Mega-Conference Week and save an additional 10% (on top of the existing 10% Early Bird Discount). If you choose to attend all four conferences, you earn *40 CPE credits for just \$1,499 when you register by September 28!* Call 800.231.1860 to take advantage of this special package pricing.

NEW for 2011 are our Virtual Conferences. These new one- and two-day events cover emerging and high interest topics, feature nationally recognized speakers, choice of concurrent sessions and have been designed to be delivered via the web right to your office! Join us online and participate in one of our practical, fast-paced, fairly priced and convenient Virtual Conferences. PPC and AuditWatch share the same philosophy on conducting conferences...they must be taught by leading experts. You have our pledge that the conferences discussed in this brochure meet those criteria and many more.

Thanks to the thousands of you who attended our conferences in 2010. If you thought last year's conferences were good (and judging from your feedback, you did), I believe you will be thrilled with our 2011 conferences. Please take advantage of the early bird registration discounts, the Mega-Conference package, our new Virtual Conferences and enjoy this year's conferences!

Best regards,

Ken Koskay, CPA, CFP
Senior Vice President, Learning Solutions
CPE & Training

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PPC AND AUDITWATCH MEGA-CONFERENCE WEEK IN LAS VEGAS

PPC and AuditWatch are presenting four back-to-back conferences at Caesars Palace in Las Vegas this fall. Register for two or more conferences during our Mega-Conference week and save an additional 10% off your registration! Call 800.231.1860 to take advantage of this special package pricing.

Attend all four conferences and earn 40 CPE Credits for only \$1,499 when you sign up by September 28!



PPC AND AUDITWATCH CONFERENCE— SMALL FIRM FORUM **NEW!**

8 CPE credits | Accounting, Auditing, Tax,
Business Management & Organization | Intermediate |
~~\$395~~ **\$355 Early Bird**
October 24 | Las Vegas, NV | Caesars Palace



PPC AND AUDITWATCH CONFERENCE ON TECHNOLOGY SOLUTIONS FOR INCREASED AUDIT EFFICIENCY

8 CPE credits | Auditing, Marketing, Specialized Knowledge
& Applications, Business Management & Organization |
Intermediate | ~~\$395~~ **\$355 Early Bird**
October 25 | Las Vegas, NV | Caesars Palace



PPC AND AUDITWATCH CONFERENCE ON AUDIT QUALITY AND EFFICIENCY

16 CPE credits | Auditing, Auditing (Governmental), Business
Management & Organization, Human Resources, Regulatory
Ethics | Intermediate | ~~\$789~~ **\$710 Early Bird**
October 26 – 27 | Las Vegas, NV | Caesars Palace



PPC AND AUDITWATCH CONFERENCE ON KEY ACCOUNTING AND AUDITING DEVELOPMENTS

8 CPE credits | Auditing, Accounting | Intermediate |
~~\$395~~ **\$355 Early Bird**
October 28 | Las Vegas, NV | Caesars Palace



Information you need...at locations you'll love!

NEW! PPC AND AUDITWATCH CONFERENCE— SMALL FIRM FORUM

Small CPA firms deal with unique issues and challenges; leveraging their flexibility and personal attention while dealing with resource constraints. This conference is focused on topics in the areas of practice management, consulting, audit, and tax—with an emphasis on productivity and a forum for sharing ideas.

CONFERENCE DATE AND LOCATION

October 24, 2011 | Las Vegas, NV

CONFERENCE SPEAKERS

Speakers for this event will include Pete Bieghler, CPA; Chris Province, CPA and other nationally recognized experts.



Peter Bieghler, CPA
AuditWatch Instructor
and Consultant,
Thomson Reuters



Chris Province, CPA
TaxWatch Instructor,
Thomson Reuters

Registration Fee:

Main Conference: \$395 **Only \$355 through September 28!**

10% Early Discount Available if Registered 30 days Prior to Event

Registration fee includes all sessions, conference materials, continental breakfasts, refreshment breaks, and luncheon.

CPE INFORMATION

CPE Credit:

Main Conference: 8 Credits

Field of Study & Program Level:

Main Conference: Accounting, Auditing, Tax, Business Management & Organization | Intermediate

CONFERENCE SCHEDULE

Program Times: 8:00 am – 5:00 pm

For a full conference agenda, visit cl.thomsonreuters.com/P.

25% DISCOUNT! Savings available on PPC and AuditWatch Conferences as part of the NEW Checkpoint Learning Premier CPE Package; visit cl.thomsonreuters.com for information.

HOTEL INFORMATION

Caesars Palace, 866.227.5944

\$159 per single/double room pending availability. *Call today! Be sure to use group code SCTHO1 when reserving your hotel room.*

Reserve your room early as discount room rates fill quickly!

CONFERENCE OBJECTIVES

This conference is designed to present issues and topics in a way that focuses on the needs of CPAs in smaller firms.

Who should attend? Small firm professionals who deliver tax and/or audit services.

TO REGISTER

See registration form on page 13 or call 800.231.1860. Visit cl.thomsonreuters.com/P to register online.

New on the Checkpoint Learning Platform

LIVE EVENT INTEGRATION

PPC and AuditWatch live event customers can now get ALL their CPE tracking streamed directly into their personalized Checkpoint Learning dashboard—for free.

There is no cost to sign up! Registration simply allows you to purchase the courses and register for the events you choose, and to have a single source for viewing and printing your CPE certificates and history.

Checkpoint Learning is the new home for PPC AND AuditWatch conferences on the internet!

Checkpoint Learning streamlines the process of converting the in-depth learning of PPC and AuditWatch conferences into CPE credits. Certificates are delivered automatically online, and credits earned are automatically compared with CPE requirements to tell you what you have left to do. Plus, get a discount on conferences if you subscribe to the Checkpoint Learning Premier Package.

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PPC AND AUDITWATCH CONFERENCE—SMALL FIRM FORUM SESSIONS

7:00 - 8:00 **Registration**
Continental Breakfast

8:00 - 8:50 **Opening General Session**
Leveraging the Small Firm Advantage

From client service to staff opportunities, small firms are simply different than large firms. This session is focused on helping you identify, match, and sell these advantages to clients, recruits, and others.

8:50 - 9:00 **Change Break**

9:00 - 9:50 **Concurrent Sessions A**

A1 ***Tax Productivity Tips and Tools***

How do you create capacity while getting it done and getting it right? Join us for a discussion of how to improve your tax practice productivity through a focus on engagement management, client management, workflow, and tools.

A2 ***Small Business Accounting and Auditing Update***

Accounting and auditing standards are changing as fast as ever. This session will filter through all the technical “noise” and present the issues and changes most likely to affect practitioners servicing small and medium size, non-public companies.

9:50 - 10:10 **Refreshment Break**

10:10 - 11:00 **Concurrent Sessions B**

B1 ***Efficient Small Company Audits: Fitting the PPC Forms to Your Clients***

This session explores the specific challenges auditors face when auditing small clients and how to address them. Discussion topics include streamlining the risk assessment and internal controls processes, balancing materiality and client competency, and using forms and practice aids more efficiently.

B2 ***Small Business Tax Update***

In this session, our tax experts present the tax law changes and issues affecting your small business clients. Highlights will include a discussion of the Small Business Jobs Act of 2010 and other significant developments.

11:00 - 11:10 **Change Break**

11:10 - 12:00 **Concurrent Sessions C**

C1 ***Performing More Efficient Reviews***

This session provides a review of key requirements for performing financial statement reviews; including a comparison of compilation, review and audit requirements. Efficiency opportunities are identified and illustrated through a review of typical review procedures from actual review engagements.

C2 ***Individual Tax Update***

Stay up to date on the tax law changes affecting individuals. Topics will include the 2010 Tax Relief Act and other developments.

12:00 - 1:00 **Lunch**

1:00 - 1:50 **Concurrent Sessions D**

D1 ***Where's the Help? Recruiting, Retention and Non-Traditional Staffing***

CPA firms are always dealing with the challenge of getting the right help at the right time. This session is focused on helping small firms to identify the right fit in recruiting and hiring staff, work with existing staff to meet their goals and improve retention, and explore other staffing options.

D2 ***Top Consulting Issues for 2011 and Beyond***

Our experts will discuss the issues that you should be talking to your clients about. The session includes an overview of the issues, the typical needs of clients, and suggestions for turning the issue into a product.

1:50 - 2:00 **Change Break**

2:00 - 2:50 **Concurrent Sessions E**

E1 ***Revenue and Cost Management***

This session is conducted as a facilitated group discussion, with learning coming from presenter tips and group best-practice sharing. Topics include growth and market-niche strategies, billing and collecting, and cost management.

E2 ***Dealing with the IRS***

Whether it's helping a client deal with a problem or navigating your own way through the increasing oversight of tax preparers, understanding the IRS is critical. This session presents tips and strategies for dealing with the IRS as a preparer and professional advisor.

2:50 - 3:10 **Refreshment Break**

3:10 - 4:00 **Concurrent Sessions F**

F1 ***Planning for the Future: Strategies for Growth and Succession***

What will you be doing in ten years? Topics in this session address key elements to consider as part of your future plan and strategy. Whether you're being groomed to take over or planning for retirement, your future depends on where the firm is positioned today and what it will look like tomorrow.

F2 ***Accounting and Write-Up Services: Tips and Pitfalls***

Is your accounting and write-up work a professional service line or something you give away as part of something else? In this session, we review the requirements and standards related to accounting and write-up services and discuss the business, technical, and ethical pitfalls you need to avoid.

4:00 - 4:10 **Change Break**

4:10 - 5:00 **Closing General Session**

Expanding Your Reach and Resources

The professional world is more connected than ever, so small doesn't have to mean limited. In this session, we explore opportunities and strategies to overcome resource constraints and expand the range of services and opportunities you offer.

NEW! PPC AND AUDITWATCH CONFERENCE ON TECHNOLOGY SOLUTIONS FOR INCREASED AUDIT EFFICIENCY

Technology is always changing, so what changes should you make? This conference focuses on technology trends and on getting the most out of your current tools and resources. Each session is designed to present technology topics for the non-expert, keeping you up to date on the big picture and focused on the things that can actually help.

CONFERENCE DATE AND LOCATION

October 25, 2011 | Las Vegas, NV

CONFERENCE SPEAKERS

Speakers for this event will include Ericka Racca, CPA, CIA; Suzy Pearse, CPA and other subject experts.



Ericka Racca, CPA, CIA
AuditWatch Faculty
Thomson Reuters



Suzy Pearse, CPA
AuditWatch Faculty
Thomson Reuters

Registration Fee:

Main Conference: \$395 **Only \$355 through September 28!**

10% Early Discount Available if Registered 30 days Prior to Event

Registration fee includes all sessions, conference materials, continental breakfasts, refreshment breaks, and luncheon.

CPE INFORMATION

CPE Credit:

Main Conference: 8 Credits

Field of Study & Program Level:

Main Conference: Auditing, Marketing, Specialized Knowledge & Applications, Business Management & Organization | Intermediate

CONFERENCE SCHEDULE

Program Times: 8:00 am – 5:00 pm

For a full conference agenda, visit cl.thomsonreuters.com/P.

25% DISCOUNT! Savings available on PPC and AuditWatch Conferences as part of the NEW Checkpoint Learning Premier CPE Package; visit cl.thomsonreuters.com for information.

HOTEL INFORMATION

Caesars Palace, 866.227.5944

\$159 per single/double room pending availability. **Call today! Be sure to use group code SCTHO1 when reserving your hotel room.**

Reserve your room early as discount room rates fill quickly!

CONFERENCE OBJECTIVES

This conference is for practitioners who need to know more about how to efficiently use electronic audit and tax tools and for those looking to maximize their return on investment in SMART, Checkpoint and other Thomson Reuters products.

Who should attend? Practitioners who have tax and/or audit practice responsibility.

TO REGISTER

See registration form on page 13 or call 800.231.1860. Visit cl.thomsonreuters.com/P to register online.

New on the Checkpoint Learning Platform

LIVE EVENT INTEGRATION

PPC and AuditWatch live event customers can now get ALL their CPE tracking streamed directly into their personalized Checkpoint Learning dashboard—for free.

There is no cost to sign up! Registration simply allows you to purchase the courses and register for the events you choose, and to have a single source for viewing and printing your CPE certificates and history.

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cl.thomsonreuters.com

PPC AND AUDITWATCH CONFERENCE ON TECHNOLOGY SOLUTIONS FOR INCREASED AUDIT EFFICIENCY SESSIONS

7:00 - 8:00 **Registration**
Continental Breakfast

8:00 - 8:50 **Opening General Session**
Coming Attractions: Current Trends in Technology and Productivity Tools

Mobile Computing, Cloud Computing, Software as a Service, Social Media, and more. You've been hearing the terms for a while now, but what does it mean for you? Don't miss this sneak preview of the services and technology enhancements that are changing the way we do business. Rated "E" for Everyone.

9:00 - 9:50 **Concurrent Sessions A**

A1 **Making the Most of Social Media, your Website, and Other Tools**

Is technology an ally or an enemy? Is social media a marketing aid or a productivity thief? Learn how to use everyday technologies to grow your practice and improve productivity.

A2 **SMART Practice Aids: Risk Assessment**

This session goes beyond product training and includes tips and best practices from auditors who understand the practical challenges of real audit engagements. The session includes live demonstration of the software in applying the concepts discussed.

9:50 - 10:10 **Refreshment Break**

10:10 - 11:00 **Concurrent Sessions B**

B1 **From Cloud to SaaS to Box: Understanding the Expanding Universe of Tax and Accounting Products**

Building on the opening session, this session evaluates some of the tax and accounting products available to your firm from new and traditional sources. Learn about what you need now, what you might need later, and what you should avoid.

B2 **SMART Practice Aids: Internal Controls**

This session is designed to help auditors improve their use of SMART Practice Aids: Internal Controls. Topics include using the software to apply a top-down approach to internal controls evaluation and testing. The session includes live demonstration of how to apply the concepts discussed.

11:00 - 11:10 **Change Break**

11:10 - 12:00 **Concurrent Sessions C**

C1 **Managing the Costs of Technology**

To upgrade or not to upgrade...that really is the question! From recruiting to client service, technology is an advantage with a cost. How much should you be spending and what should you be spending it on? This session presents an analysis of the critical choices and tips for getting the most out of your technology budget and resources.

C2 **SMART Practice Aids: Disclosure and Fieldwork**

This session is an introduction to SMART Practice Aids: Disclosure and SMART Practice Aids: Fieldwork; including tips for getting the most out of these products. The session includes live demonstration of the software.

12:00 - 1:00 **Lunch**

1:00 - 1:50 **Concurrent Sessions D**

D1 **Creating a Paperless Tax Practice**

Changing a core business process can be daunting. This session discusses the advantages of a paperless practice, the practical challenges of converting your existing process, and implementation plan essentials. Topics also include a discussion of the hardware, software, and other workflow tools you will need to make it all happen.

D2 **Powerful and Easy Excel and Data Extraction Tests**

This session will showcase data extraction techniques that require little or no training to perform. The session will focus on functions within ACL, IDEA, and Excel, allowing participants to experience a platform they are familiar with. You will walk away with practical ideas that you can put to work right away.

1:50 - 2:00 **Change Break**

2:00 - 2:50 **Concurrent Sessions E**

E1 **The Best Resources You Already Have (or Can Easily Get): A Presentation and Discussion of Really Useful Stuff**

There are so many productivity tools to buy, but are you using the ones you already have? Explore the hidden efficiency gems built into the products you already have, and learn about others you can use or download for free. This session also includes a discussion of favorite productivity tools and methods used by participants.

E2 **IT Controls Workshop: What Non-Experts Need to Know About IT Controls at Very Small Audit Clients**

You don't have to be a mechanic to drive a car and you don't have to be an IT expert to perform an audit (but there are a few things you really should know). This two-part session will focus on IT control fundamentals, with an emphasis on what auditors need to know about IT controls in audits of very small companies. The objective of this session is to help you understand what you have to do, what you don't have to do, and what to do with a problem once you find it.

2:50 - 3:10 **Concurrent Sessions E**

3:10 - 4:00 **Concurrent Sessions F**

F1 **Online Research Tips and Strategies**

When it comes to on-line research, knowing where to look is sometimes half the battle. This session includes a discussion of useful websites, better search strategies, and tips for getting the most out of Checkpoint.

F2 **IT Controls Workshop: What Non-Experts Need to Know About IT Controls at Very Small Audit Clients (Continued from E2)**

4:00 - 4:10 **Change Break**

4:10 - 5:00 **Closing General Session**
Privacy and Encryption

Data security is more important than ever. Don't wait until it's too late to find out what you should already be doing to protect your firm and your client's information. This session explores the ins and outs of privacy and encryption; from regulation to available tools.

BACK BY POPULAR DEMAND! PPC AND AUDITWATCH CONFERENCE ON AUDIT QUALITY AND EFFICIENCY

Competition and fee pressure, changing tools and changing rules, new standards and new hires—for these and other reasons, focusing on quality and efficiency is more important than ever. Join us for a conference focused on how to do things more efficiently and how to do them better. Sessions at this conference include topics important to everybody and tips customized to your firm. In registering for this conference, you will also have the option to enroll in an add-on customized individual firm session with an AuditWatch Productivity Consultant who will demonstrate implementation of the productivity concepts on one of your actual audit or review engagements.

CONFERENCE DATE AND LOCATION

October 26 – 27, 2011 | Las Vegas, NV

CONFERENCE SPEAKERS

KEYNOTE SPEAKER: Former AICPA ASB Chairman Harold Monk, CPA.
Additional speakers for this event will include AuditWatch Consultants Shawn O'Brien, CPA; and Jex Varner, CPA.



Harold Monk, CPA
Former Chairman, AICPA
Auditing Standards Board



Shawn O'Brien, CPA
AuditWatch Faculty
Thomson Reuters



Jex Varner, CPA
AuditWatch Faculty
Thomson Reuters

Registration Fee:

Main Conference: \$789 **Only \$710 through September 28!**

10% Early Discount Available if Registered 30 days Prior to Event

Registration fee includes all sessions, conference materials, continental breakfasts, refreshment breaks, luncheon and reception.

CPE INFORMATION

CPE Credit:

Main Conference: 16 Credits

Field of Study & Program Level:

Main Conference: Auditing, Auditing (Governmental), Business Management & Organization, Human Resources, Regulatory Ethics | Intermediate

25% DISCOUNT! Savings available on PPC and AuditWatch Conferences as part of the NEW Checkpoint Learning Premier CPE Package; visit cl.thomsonreuters.com for information.

CONFERENCE SCHEDULE

Day One

Program Times: 8:00 am – 4:50 pm
Networking Reception: 6:00 pm – 7:00 pm

Day Two

Program Times: 8:00 am – 4:20 pm

For a full conference agenda, visit cl.thomsonreuters.com/P.

HOTEL INFORMATION

Caesars Palace, 866.227.5944

\$159 per single/double room pending availability. *Call today! Be sure to use group code SCTHO1 when reserving your hotel room.*

Reserve your room early as discount room rates fill quickly!

CONFERENCE OBJECTIVES

This conference will provide you with the latest updates and techniques to help ensure that your firm is performing audits effectively and efficiently.

Who should attend? Professionals with audit responsibility.

NEW! CUSTOMIZED FIRM SESSIONS

(Optional Workshop)

For an additional registration fee of \$999, you can enroll in a 75-minute session with an AuditWatch Productivity Consultant to help you identify opportunities for improvement on one of your audit or review engagements. The consultant will review the file before the conference and lead a discussion of specific changes you could consider on that engagement, on similar engagements, and to your approach in general. The session is open to any members of your firm in attendance at the conference.

Topics likely to be addressed include any or all of the following:

- Improving Audit Quality
- Identifying Efficiency Opportunities
- Evaluating Use of the PPC forms
- Making Reviews Look Like Reviews

This session is recommended for firms with 20 or fewer auditors. We will work with you to help you choose the right engagement to evaluate during in the session. Add-on workshops are available before, during or after the conference.

PPC AND AUDITWATCH CONFERENCE ON AUDIT QUALITY AND EFFICIENCY SESSIONS

DAY 1

7:00 - 8:00 **Registration**
Continental Breakfast

8:00 - 9:00 **Opening General Session**
Evaluating and Changing Firm Culture

Improving productivity takes more than a notebook full of good ideas. Real improvement takes a commitment from the whole firm and each engagement team to look at the audit differently and to challenge their assumptions. This session explores the elements of firm culture necessary for productivity improvement.

9:00 - 9:05 **Change Break**

9:05 - 9:55 **Concurrent Sessions A**

A1 **Getting More Out of Planning**

If you have to do it anyway, make it count! Great planning is more than a 15-minute brainstorming meeting between the salad and the chicken wings. This session focuses on the objectives and form of great audit planning; including a suggested agenda for getting the most out of your time.

A2 **Spotting Opportunities: What Engagement Leaders Need to Know About Data Extraction and Other E-Tools**

To get what you want you have to know what you want. This session is designed to introduce audit leaders to a variety of audit procedures that can be done more effectively or efficiently using data extraction software and more common spreadsheet functions. This non-technical session is focused on helping you to spot opportunities to perform common audit procedures better on your own engagements.

A3 **Understanding and Avoiding Common Peer Review Findings**

In this session, we will summarize findings from the latest peer review reports. We will explain the issues most commonly discussed in these reports and provide suggestions for avoiding these deficiencies. This session will focus on providing practical advice that your firm can apply to improve your audits and better serve your clients.

9:55 - 10:15 **Refreshment Break**

10:15 - 11:55 **Concurrent Sessions B**

B1 **Internal Controls Workshop: Focusing on What Matters—Part 1**

Internal controls are a part of every audit. In this session we will review best practices for identifying, evaluating, and testing internal controls. Topics in this two-part session include identifying key controls, the top-down approach, performing effective walkthroughs, the cost-benefit of testing controls, rotation plans, and the effect of internal controls on substantive testing. *If you choose this session, it's recommended that you attend both parts as they build upon each other.*

B2 **PPC 101: Making the Forms Work for You**

Do you have questions about how to modify the PPC approach to best suit your engagements? In this session we will review the most frequently asked questions related to the PPC forms and methodology; including which forms you should use, which forms you can skip, and using key forms better.

B3 **Quality Control and Ethics Workshop: An in-depth look at the rules and issues – Part 1**

This session covers the standards, codes of conduct, and ethics rulings important to maintaining a high-quality and compliant assurance practice. The session is structured as a two-part workshop driven by examples, group discussion, Q&A, and practical considerations. *If you choose this session, it's recommended that you attend both parts as they build upon each other.*

11:55 - 1:00 **Lunch**

1:00 - 2:40 **Concurrent Sessions C**

C1 **Internal Controls Workshop: Focusing on What Matters—Part 2**

Internal controls are a part of every audit. In this session we will review best practices for identifying, evaluating, and testing internal controls. Topics in this two-part session include identifying key controls, the top-down approach, performing effective walkthroughs, the cost-benefit of testing controls, rotation plans, and the effect of internal controls on substantive testing. *If you choose this session, it's recommended that you attend both parts as they build upon each other.*

C2 **Tips for Improving Feedback as a Staff Development Tool**

In the audit world, most training is on-the-job-training. This session reinforces the importance of timely and focused feedback; including important steps to making the feedback more effective, professional, and comfortable.

C3 **Quality Control and Ethics Workshop: An In-Depth Look at the Rules and Issues – Part 2**

This session covers the standards, codes of conduct, and ethics rulings important to maintaining a high-quality and compliant assurance practice. The session is structured as a two-part workshop driven by examples, group discussion, Q&A, and practical considerations. *If you choose this session, it's recommended that you attend both parts as they build upon each other.*

2:40 - 2:50 **Change Break**

2:50 - 3:40 **Concurrent Sessions D**

D1 **Practitioners Forum: Roundtable Discussions of Current Issues and Practices—Small Firms**

Our consultants will moderate different round table discussions (organized by firm size) to identify common challenges, share best practices, and learn from others' experiences. This session is a facilitated discussion where the ideas come from both participants and instructors.

PPC AND AUDITWATCH CONFERENCE ON AUDIT QUALITY AND EFFICIENCY SESSIONS (CONT.)

D2 **Practitioners Forum: Roundtable Discussions of Current Issues and Practices—Medium Firms**

D3 **Practitioners Forum: Roundtable Discussions of Current Issues and Practices—Large Firms**

3:40 - 4:00 **Refreshment Break**

4:00 - 4:50 **General Session**
Getting the Most from Your Staff: Understanding and Bridging the Generation Gaps

Each generation of auditors comes with its own skills, background, attitudes, and ambitions. In this session we will discuss key differences between the way newer staff and the partners hiring them see the profession and their jobs; including ideas for leveraging new staff strengths and overcoming differences in expectations.

DAY 2

7:00 - 8:00 **Continental Breakfast**

8:00 - 9:00 **General Session**
Responding to the Current Fraud Landscape

We can learn a lot about fraud by looking closer at how frauds have happened in the past. This session will paint a picture of the current fraud landscape by summarizing the lessons learned in recent studies, surveys, and fraud cases.

9:00 - 9:05 **Change Break**

9:05 - 10:45 **Concurrent Sessions E**

E1 **Efficiency Considerations in Small Company Audits**

Smaller companies have their own audit risks and challenges. This session will delve into the specific problems auditors face when auditing small clients and how to address them. Discussion topics will include streamlining the risk assessment and internal control process, modifying documentation, using forms and practice aids more efficiently and more effectively.

E2 **Documentation Tips and Pitfalls**

A key to audit efficiency is knowing what you need and what you don't. This session explores common deficiencies and inefficiencies in documentation illustrated through examples from actual audit engagements.

E3 **Single Audit Efficiencies**

It's called a single audit, but usually feels like a double audit. Recent standards and guidance have focused on improving single audit quality. This session is focused on helping you identify potential efficiency improvements without sacrificing quality or effectiveness.

10:45 - 11:00 **Refreshment Break**

11:00 - 12:40 **Concurrent Sessions F**

F1 **Audit Approach Workshop: Tips and Strategies to Improve Procedures from Analytics to Sampling—Part 1**

Audit quality and efficiency depend on having the right audit approach in each area. Topics in this session include determining the most efficient test to perform, improving analytical procedures, avoiding sampling pitfalls, and more. This two-part, workshop-style session includes examples, exercises, and group discussion to delve a little deeper into these topics. *If you choose this session, it's recommended that you attend both parts as they build upon each other.*

F2 **Running the Firm: A Discussion of Practice Issues from Recruiting and Retention to Billing and Collecting**

Profitability is affected by more than the hours in the budget. Join us for a discussion of tips and best practices from outside the engagement file. This instructor-led discussion is focused on responding to common practice management issues with tips, advice, and best practices.

F3 **Improving Yellow Book Audits: Avoiding Pitfalls and Improving Productivity**

Getting it right is the first step to improving productivity. This session focuses on common productivity pitfalls and best practices in governmental, not-for-profit, and single-audits. Topics are related to avoiding common deficiencies and applying efficiency best practices to these specialized audits.

12:40 - 1:40 **Lunch**

1:40 - 3:20 **Concurrent Sessions G**

G1 **Audit Approach Workshop: Tips and Strategies to Improve Procedures from Analytics to Sampling—Part 2**

Audit quality and efficiency depend on having the right audit approach in each area. Topics in this session include determining the most efficient test to perform, improving analytical procedures, avoiding sampling pitfalls, and more. This two-part, workshop-style session includes examples, exercises, and group discussion to delve a little deeper into these topics. *If you choose this session, it's recommended that you attend both parts as they build upon each other.*

G2 **Efficiency Considerations in Small Company Audits (Repeated from E1)**

G3 **Single Audit Efficiencies (Repeated from E3)**

3:20 - 3:30 **Change Break**

3:30 - 4:20 **General Session**
Lights Out! Planning to Finish the Job

A lot of time is lost when "almost done" turns into "not done yet". This session explains the benefits of developing and committing to an audit completion plan; including the engagement and client management factors crucial to achieving that plan.

PPC AND AUDITWATCH CONFERENCE ON KEY ACCOUNTING AND AUDITING DEVELOPMENTS

Accounting and auditing standards are changing as fast as ever. The FASB/IASB joint projects and convergence efforts have resulted in a flood of pronouncements and exposure drafts affecting a wide spectrum of companies and industries. This conference is designed to filter through the mass of changes and to present the issues and changes with an emphasis on what you need to know right now.

CONFERENCE DATE AND LOCATION

October 28, 2011 | Las Vegas, NV

CONFERENCE SPEAKERS

Speakers for this event will include Susan Longo, CPA; Wayne Kerr, CPA, and other nationally recognized experts.



Susan Longo, CPA
PPC CPE In-House
Instructor



Wayne Kerr, CPA
AuditWatch Instructor
Senior Consultant,
Thomson Reuters

Registration Fee:

Main Conference: \$395 **Only \$355 through September 28!**

10% Early Discount Available if Registered 30 days Prior to Event

Registration fee includes all sessions, conference materials, continental breakfasts, refreshment breaks, and luncheon.

CPE INFORMATION

CPE Credit:

Main Conference: 8 Credits

Field of Study & Program Level:

Main Conference: Auditing, Accounting | Intermediate

CONFERENCE SCHEDULE

Program Times: 8:00 am – 5:00 pm

For a full conference agenda, visit cl.thomsonreuters.com/P.

25% DISCOUNT! Savings available on PPC and AuditWatch Conferences as part of the NEW Checkpoint Learning Premier CPE Package; visit cl.thomsonreuters.com for information.

HOTEL INFORMATION

Caesars Palace, 866.227.5944

\$159 per single/double room pending availability. *Call today! Be sure to use group code SCTHO1 when reserving your hotel room.*

Reserve your room early as discount room rates fill quickly!

CONFERENCE OBJECTIVES

This conference is designed for audit professionals who need to stay up-to-date with a broad array of technical accounting and auditing standards.

Who should attend? Practitioners who have accounting and audit practice responsibility.

TO REGISTER

See registration form on page 13 or call 800.231.1860. Visit cl.thomsonreuters.com/P to register online.

New on the Checkpoint Learning Platform

LIVE EVENT INTEGRATION

PPC and AuditWatch live event customers can now get ALL their CPE tracking streamed directly into their personalized Checkpoint Learning dashboard—for free.

There is no cost to sign up! Registration simply allows you to purchase the courses and register for the events you choose, and to have a single source for viewing and printing your CPE certificates and history.

Checkpoint Learning is the new home for PPC AND AuditWatch conferences on the internet!

Checkpoint Learning streamlines the process of converting the in-depth learning of PPC and AuditWatch conferences into CPE credits. Certificates are delivered automatically online, and credits earned are automatically compared with CPE requirements to tell you what you have left to do. Plus, get a discount on conferences if you subscribe to the Checkpoint Learning Premier Package.

cl.thomsonreuters.com

PPC AND AUDITWATCH CONFERENCE ON KEY ACCOUNTING AND AUDITING DEVELOPMENTS SESSIONS

7:00 - 8:00 **Registration**
Continental Breakfast

8:00 - 9:00 **Opening General Session**
Current FASB Activities: An Accounting Update

This session will provide you with an overview of new, and newly effective, accounting pronouncements. This session is focused on helping auditors understand the likely applicability and impact of new standards on their clients.

9:00 - 9:10 **Change Break**

9:10 - 10:00 **Concurrent Sessions A**

A1 **Revenue Recognition: Understanding the New and Proposed Rules**

Revenue recognition is always a key consideration for auditors. The FASB recently issued an exposure draft that would modify revenue recognition in significant ways. This session includes an update on the status of proposals, an explanation of new rules, and a discussion of implementation challenges related to new or proposed revenue recognition accounting rules.

A2 **IFRS Briefing**

Convergence with International Financial Reporting Standards (IFRS) has already had a significant impact on standard-setters and the rest of the profession. Topics in this session include a briefing on the current status of adoption, the impact and of convergence, standard-setter remaining agendas, and questions about the effect on the profession.

10:00 - 10:20 **Refreshment Break**

10:20 - 12:00 **Concurrent Sessions B**

B1 **On the Books: The New Lease Accounting Rules**

Few exposure drafts have generated as much discussion as the FASB's proposed ASU on Leases. With sweeping changes to lessee and lessor accounting, this standard is expected to have a wide impact across businesses and industries. This session is focused on the new accounting treatment for leases, but will also include discussion of implementation issues and challenges.

B2 **Latest Findings from Regulators: DOL, OMB, GOA, HUD, and PCAOB**

Reviewing their findings is a great way to understand the issues regulators are focused on and identify risks in your own practice. This session covers a wide range of topics from a broad spectrum of practice areas, with a focus on helping you identify trends, recognize issues, improve quality and stay out of trouble.

12:00 - 1:00 **Lunch**

1:00 - 1:50 **Concurrent Sessions C**

C1 **Compilation and Review: Update and Issues**

This session will update you on the developments related to compilations and reviews; including an analysis of common deficiencies and peer review findings.

C2 **Financial Instruments and Fair Value: Practice Issues and New Standards**

In the past few years, fair value measures and disclosures have become major issues in auditing and financial reporting, with a near constant stream of new rules and proposals. Topics in this session include a recap of significant recently-issued standards, a discussion of accounting and auditing practice issues, and a preview of things to come.

1:50 - 2:00 **Change Break**

2:00 - 3:40 **Concurrent Sessions D**

D1 **On the Books: The New Lease Accounting Rules (Repeated from B1)**

D2 **Future Issues for the Profession: What's Coming and What It Means**

The profession is changing as fast as ever. This session is a discussion and analysis of the issues stemming from exposure drafts, the FASB agenda, private company financial reporting, IFRS, regulation and more.

3:40 - 4:00 **Refreshment Break**

4:00 - 4:50 **Closing General Session**

Auditing Standards Update: New Standards and the Impact of Clarity

Topics in this session include a review of recently issued auditing standards and an evaluation of the ASB's clarity project. The session includes a summary and analysis of differences between the clarified and original auditing standards.

MEGA-CONFERENCE WEEK REGISTRATION

Please use this form to register via mail or fax:

MAIL: P.O. Box 966
Fort Worth, TX 76101

FAX: 817.877.3694
PHONE: 800.231.1860

For more information on PPC Conferences: cl.thomsonreuters.com/P

Name _____

Firm Name _____

Address _____ Suite _____

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Business Telephone _____ Email _____

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Please register me for the following PPC and AuditWatch Conferences:

- | | | | |
|--|--------|------------------|-------------------------------|
| <input type="checkbox"/> Small Firm Forum Conference Registration Only | \$395 | Registration Fee | Early Bird: \$355* |
| <input type="checkbox"/> Technology Solutions Conference Registration Only | \$395 | | Early Bird: \$355* |
| <input type="checkbox"/> Audit Quality & Efficiency Conference Registration Only | \$789 | | Early Bird: \$710* |
| <input type="checkbox"/> Key A&A Developments Conference Registration Only | \$395 | | Early Bird: \$355* |
| <input type="checkbox"/> Mega-Conference Week (2 Day Bundle) | \$790 | | Special Price: \$639† |
| <input type="checkbox"/> Mega-Conference Week (3 Day Bundle) | \$1185 | | Special Price: \$959† |
| <input type="checkbox"/> Mega-Conference Week (4 Day Bundle) | \$1580 | | Special Price: \$1279† |
| <input type="checkbox"/> Mega-Conference Week: Oct. 24–28 (All 4 Conferences) | \$1974 | | Special Price: \$1499† |

*Reflects 10% Early Bird Discount if registered by September 28.

†Reflects an additional 10% Package Discount applied to Early Bird Price.

TOTAL AMOUNT ENCLOSED \$ _____

Full payment must accompany registration form. Please make checks payable to Thomson Reuters.

Please bill the following credit card: American Express® MasterCard
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Credit Card No. _____ Exp. Date _____

Signature _____

In accordance with the Americans with Disabilities Act, do you have any special needs?

No Yes (if yes, you will be contacted)

SMALL FIRM FORUM CONFERENCE

Please register me for the following sessions:

- | | | |
|------------------|--|--|
| SESSION A | <input type="checkbox"/> A1 Tax Tips and Tools | <input type="checkbox"/> A2 A&A Update |
| SESSION B | <input type="checkbox"/> B1 Small Company Audits | <input type="checkbox"/> B2 Small Business Tax Update |
| SESSION C | <input type="checkbox"/> C1 More Efficient Reviews | <input type="checkbox"/> C2 Individual Tax Update |
| SESSION D | <input type="checkbox"/> D1 Recruiting, Retention | <input type="checkbox"/> D2 Top Consulting Issues for 2011 |
| SESSION E | <input type="checkbox"/> E1 Revenue/Cost Mgmt | <input type="checkbox"/> E2 Dealing with the IRS |
| SESSION F | <input type="checkbox"/> F1 Growth and Succession | <input type="checkbox"/> F2 Accounting and Write-Up Services |

TECHNOLOGY SOLUTIONS CONFERENCE

Please register me for the following sessions:

- | | | |
|------------------|--|--|
| SESSION A | <input type="checkbox"/> A1 Social Media, Website | <input type="checkbox"/> A2 SMART Practice Aids: Risk Assessment |
| SESSION B | <input type="checkbox"/> B1 Cloud to SaaS to Box | <input type="checkbox"/> B2 SMART Practice Aids: Internal Controls |
| SESSION C | <input type="checkbox"/> C1 Costs of Technology | <input type="checkbox"/> C2 SMART Practice Aids: Disclosure |
| SESSION D | <input type="checkbox"/> D1 Paperless Tax Practice | <input type="checkbox"/> D2 Excel and Data Extraction Tests |
| SESSION E | <input type="checkbox"/> E1 Best Resources | <input type="checkbox"/> E2 IT Controls Workshop Part 1 |
| SESSION F | <input type="checkbox"/> F1 Online Research Tips | <input type="checkbox"/> F2 IT Controls Workshop Part 2 |

AUDITING QUALITY & EFFICIENCY CONFERENCE

Please register me for the following sessions:

- | | | |
|------------------|--|--|
| SESSION A | <input type="checkbox"/> A1 More Out of Planning | <input type="checkbox"/> A2 Data Extraction and Other E-Tools |
| | <input type="checkbox"/> A3 Understanding/Avoiding Common Peer Review Findings | |
| SESSION B | <input type="checkbox"/> B1 Internal Controls: Part 1 | <input type="checkbox"/> B2 PPC 101 |
| | <input type="checkbox"/> B3 Quality Control/Ethics: Part 1 | |
| SESSION C | <input type="checkbox"/> C1 Internal Controls: Part 2 | <input type="checkbox"/> C2 Feedback as a Staff Development Tool |
| | <input type="checkbox"/> C3 Quality Control/Ethics: Part 2 | |
| SESSION D | <input type="checkbox"/> D1 Practitioners Forum: Small Firms | |
| | <input type="checkbox"/> D2 Medium Firms | <input type="checkbox"/> D3 Large Firms |
| SESSION E | <input type="checkbox"/> E1 Efficiency Considerations | <input type="checkbox"/> E2 Documentation Tips and Pitfalls |
| | <input type="checkbox"/> E3 Single Audit Efficiencies | |
| SESSION F | <input type="checkbox"/> F1 Audit Approach: Part 1 | <input type="checkbox"/> F2 Running the Firm: Practice Issues |
| | <input type="checkbox"/> F3 Improving Yellow Book Audits | |
| SESSION G | <input type="checkbox"/> G1 Audit Approach: Part 2 | <input type="checkbox"/> G2 Efficiency Considerations |
| | <input type="checkbox"/> G3 Single Audit Efficiencies | |

ACCOUNTING & AUDITING DEVELOPMENTS CONFERENCE

Please register me for the following sessions:

- | | | |
|------------------|--|--|
| SESSION A | <input type="checkbox"/> A1 Revenue Recognition | <input type="checkbox"/> A2 IFRS Briefing |
| SESSION B | <input type="checkbox"/> B1 Accounting Rules | <input type="checkbox"/> B2 Latest Findings from Regulators |
| SESSION C | <input type="checkbox"/> C1 Compilation and Review | <input type="checkbox"/> C2 Financial Instruments and Fair Value |
| SESSION D | <input type="checkbox"/> D1 Accounting Rules | <input type="checkbox"/> D2 Future Issues for the Profession |

NEW! VIRTUAL CONFERENCES

Our virtual conferences break traditional barriers by giving you live, up to the minute updates on key topics from nationally recognized experts from the comfort of your own office!. Each of our five virtual conferences offers multiple tracks and a variety of speakers—so you can customize your web-based, live-training experience. Just like our on-site conferences, you will have the opportunity to choose the sessions that you're most interested in.

WHAT IS A "VIRTUAL CONFERENCE?"

A "virtual conference" is a web-based training event. We use Web-Ex™, an internet-based tool through which you can view expert content. Each conference features a **live streaming video** feed of our experts, so that you can not only hear them, but also look on as they bring you the most up-to-date information. Our virtual conferences are **interactive!** You will have an opportunity to submit questions live to our experts and get their answers in real-time, making the session as applicable to your practice as it possibly can be!

VIRTUAL CONFERENCE FEATURES

- Attend from anywhere with *no travel costs*
- Up-to-date, relevant training
- Well-known experts
- Live, streaming video
- Interactive

VIRTUAL CONFERENCE INFORMATION

Level: Update

Advanced Prep: None

Visit cl.thomsonreuters.com for more information including start times, course descriptions, learning objectives and course prerequisites.

Pricing:

Price per participant/per conference:

\$229 one day / \$379 two days

FAQs:

- Length: Virtual conferences are one or two days long. Eight CPE Credits per day.
- Time: 8:00-5:00 CST • Register: Visit website to register.
- Registration closes at 5:00 PM CST the day before the scheduled event.
- CPE delivery mode: Group internet-based.
- Platform: Webinars are presented on WebEx™, an internet-based tool through which you can view expert content and live-streaming video. As you watch, you can hear, see and interact with the speaker.

Audio broadcast available:

Log on to the audio broadcast site and you will automatically hear our presentation through your computer. A toll free dial-in is also available.



PPC AND AUDITWATCH VIRTUAL ACCOUNTING AND AUDITING SUMMIT AND IFRS FORUM **NEW!**

8 or 16 CPE credits | Accounting, Accounting (Governmental), Auditing, Auditing (Governmental) | Intermediate
\$229 one day / \$379 two days per participant, per conference
December 6 – 7, 2011



PPC AND AUDITWATCH VIRTUAL CONFERENCE ON GROWTH AND PROFITABILITY **NEW!**

8 CPE credits | Auditing, Business Management & Organization, Marketing | Intermediate
\$229 one day per participant, per conference
September 22, 2011



PPC AND AUDITWATCH SMALL BUSINESS ADVISOR VIRTUAL CONFERENCE **NEW!**

8 CPE credits | Taxes, Management Advisory Services, Business Management & Organization | Intermediate
\$229 one day per participant, per conference
July 29, 2011



PPC VIRTUAL USER CONFERENCE **NEW!**

8 CPE credits | Taxes, Management Advisory Services, Business Management & Organization | Intermediate
\$229 one day per participant, per conference
November 8, 2011



PPC AND AUDITWATCH VIRTUAL CONFERENCE ON TAX PLANNING AND CONSULTING **NEW!**

16 CPE credits | Taxes | Intermediate
\$379 per participant, per conference
August 4 – 5, 2011

PPC AND AUDITWATCH VIRTUAL ACCOUNTING AND AUDITING SUMMIT AND IFRS FORUM

Accounting and auditing guidance today is changing at a rapid pace. You need more than a standard A&A update to keep up-to-date with the evolving environment. This two-day virtual conference goes beyond the standard training by giving you 1) quick overviews of all the important developments, and 2) deeper dives into the current hot topics. The agenda below is flexible and will evolve as needed to ensure that we deliver the most up-to-date information in this conference.

Our virtual conferences offer multiple tracks and a variety of speakers—so you can customize your web-based, live-training experience. Each conference is delivered via an interactive web-based tool that includes streaming live video!

Our Accounting and Auditing Summit and IFRS Forum is a two-day conference. You can also choose to attend only one day, if you prefer.

CONFERENCE DATE AND TIME

December 6 – 7, 2011 | 8:00 am – 5:00 pm CST

CONFERENCE SPEAKERS

Speakers for this event will include Susan Longo, CPA; Wayne Kerr, CPA; and Troy Manning, CPA.

Registration Fee:

\$229 one day / \$379 two days per participant, per conference

10% Early Discount Available if Registered 30 days Prior to Event

CPE INFORMATION

CPE Credit:

Main Conference: 8 or 16 Credits

Field of Study & Program Level:

Accounting, Accounting (Governmental), Auditing, Auditing (Governmental)

TO REGISTER

For more information, descriptions of each session and to register go to:
cl.thomsonreuters.com

GENERAL SESSIONS (EVERYONE ATTENDS):

- **The State of the Profession :** Analyzing the impact of the profession's recent history on CPA firms
- **Private Company Financial Reporting:** The status, issues and arguments
- **Auditing in the Era of Estimates:** Dealing with the tidal wave of new standards producing soft numbers

CONCURRENT SESSIONS (YOU CHOOSE YOUR SESSIONS):

Executive Briefings Track: Individual sessions dedicated to providing an overview of the important activities by standard setters and regulatory agencies.

- FASB Briefing
- ASB Briefing
- SEC and PCAOB Briefing
- GASB Briefing
- OMB and GAO Briefing
- IRS Briefing

IFRS Track: Individual sessions dedicated to providing an overview of the current status of IFRS integration issues in the U.S. Like other hot topic sessions, these will reflect the very latest information at the time of the conference; including in-depth analysis of any SEC decisions and announcements about IFRS adoption for public companies and our analysis of the fall-out for private companies

- IFRS Briefing
- Financial Reporting Global Snapshot
- IFRS vs. US GAAP
- Understanding and Analyzing IFRS Financial Statements

Fraud Workshop: Latest surveys, trends, and tips

Improving Yellow Book Audits Topics: Individual sessions focused on the common pitfalls, current issues, and best practices in each practice area.

- Local Government and Not-For Profit Entity Focus
- Single Audit Focus

New Standards—Deep Dives: Individual sessions providing deeper analysis of significant new standards. Like other hot topic sessions, these will reflect the very latest information and planning issues at the time of the conference. Topics currently based on exposure documents will be updated and may be expanded if they are finalized before the conference.

- Lease Accounting
- Understanding the New Revenue Recognition Rules
- Addressing Common Problems and Recent Changes in Auditing Fair Value and Financial Instruments

Common Deficiencies Noted By Regulators—Nongovernmental: Analysis of peer review and other common regulatory findings

Common Deficiencies Noted By Regulators—Governmental: Analysis of peer review and other common regulatory findings

PPC AND AUDITWATCH VIRTUAL CONFERENCE ON GROWTH AND PROFITABILITY

This virtual conference focuses on the tools and topics critical to improving your firm's growth and profitability with topics in the areas of leadership, efficiency, selling and strategy.

Our virtual conferences offer multiple tracks and a variety of speakers—so you can customize your web-based, live-training experience. Each conference is delivered via an interactive web-based tool that includes streaming live video!

CONFERENCE DATE AND TIME

September 22, 2011 | 8:00 am – 5:00 pm CST

CONFERENCE SPEAKERS

Speakers for this event include Jex Varner, CPA.



Jex Varner, CPA
AuditWatch Faculty
Thomson Reuters

REGISTRATION FEE:

\$229 per participant, per conference

10% Early Discount Available if Registered 30 days Prior to Event

CPE INFORMATION

CPE Credit:

Main Conference: 8 Credits

Field of Study & Program Level:

Auditing, Business Management & Organization, Marketing, Personal Development

TO REGISTER

For more information, descriptions of each session and to register go to:
cl.thomsonreuters.com

GENERAL SESSIONS (EVERYONE ATTENDS):

- **Strategies to Grow Your Practice:** Top ideas to take your firm to the next level

CONCURRENT SESSIONS (YOU CHOOSE YOUR SESSIONS):

- **Essential Leadership:** Critical leadership traits and actions contrasted with common leadership pitfalls
- **Presenting Your Proposal—and Yourself:** Tips and techniques for getting the most out of your time in front of clients and prospects
- **Closing the Deal:** Essential steps in getting from interested prospect to signed engagement letter
- **Avoiding the Most Common Audit Inefficiencies:** The most common inefficiencies our consultants encounter in working with firms
- **Efficiency Focus:** Auditing Small Businesses: Tips for streamlining audit procedures in smaller company audits
- **Beyond Realization:** Important metrics in measuring audit efficiency
- **Cross Selling:** Working the prospects you already have
- **Scope Creep:** Staying in control of out-of-control clients
- **Developing and Retaining Quality Staff:** Strategies and techniques for finding and keeping the best people.
- **CPA and Firm Merger Strategies:** Learn keys to success and pitfalls to avoid from our expert.
- **Setting and Negotiating Fees:** How to negotiate with confidence and set fees that work for your practice

PPC AND AUDITWATCH SMALL BUSINESS ADVISOR VIRTUAL CONFERENCE

This virtual conference focuses on your needs as an advisor to small businesses, addressing topics related to accounting, tax, and consulting.

Our virtual conferences offer multiple tracks and a variety of speakers—so you can customize your web-based, live-training experience. Each conference is delivered via an interactive web-based tool that includes streaming live video!

CONFERENCE DATE AND TIME

July 29, 2011 | 8:00 am – 5:00 pm CST

CONFERENCE SPEAKERS

Speakers for this event include Chris Province, CPA.



Chris Province, CPA
TaxWatch Instructor,
Thomson Reuters

REGISTRATION FEE:

\$229 per participant, per conference

10% Early Discount Available if Registered 30 days Prior to Event

CPE INFORMATION

CPE Credit:

Main Conference: 8 Credits

Field of Study & Program Level:

Taxes, Management Advisory Services, Business Management & Organization

TO REGISTER

For more information, descriptions of each session and to register go to:
cl.thomsonreuters.com

GENERAL SESSIONS (EVERYONE ATTENDS):

- **Small Business Profile:** Recognizing the unique needs and expectations of small business owners
- **Assisting Troubled Companies:** Advising your clients during turbulent economic times

CONCURRENT SESSIONS (YOU CHOOSE YOUR SESSIONS):

- **Full Service Checklist:** A Review of the Top Small Business Consulting Opportunities
- **Blurry Lines:** Navigating the boundary between independence and needy assurance clients
- **Internal Controls for Small Businesses:** Giving better, more practical advice
- **Dealing with the IRS: A Primer:** A primer from A to Z; providing an overview of what you need to know to help your clients respond to audits, inquiries, and other IRS matters.
- **Start-Up Businesses:** Advising on everything from choosing the right legal entity to choosing the right employees
- **Raising Capital in Tough Times:** Obtaining capital from banks, investors, SBA and more
- **The Outsourced CFO:** Defining, controlling, and getting paid for your role
- **Addressing Common Issues in Closely Held and Family Businesses:** A checklist and tips for advising clients on taxation and other matters
- **Facilitating Planning and Strategy Sessions:** Filling the role of objective facilitator in helping your clients get the most from their planning sessions
- **Cash is King:** A discussion about managing cash flow
- **Succession Planning:** Best practices for exit strategies and planning for the future

PPC VIRTUAL USER CONFERENCE

This virtual conference focuses on your needs as a user of PPC assurance products; providing user tips and updates to keep you current and to help you get the most out of the products you use.

Our virtual conferences offer multiple tracks and a variety of speakers—so you can customize your web-based, live-training experience. Each conference is delivered via an interactive web-based tool that includes streaming live video!

CONFERENCE DATE AND TIME

November 8, 2011 | 8:00 am – 5:00 pm CST

CONFERENCE SPEAKERS

Speakers for this event will include Suzy Pearse, CPA and Wayne Kerr, CPA.



Suzy Pearse, CPA
AuditWatch Instructor
Consultant
Thomson Reuters



Wayne Kerr, CPA
AuditWatch Instructor
Senior Consultant,
Thomson Reuters

REGISTRATION FEE:

\$229 per participant, per conference

10% Early Discount Available if Registered 30 days Prior to Event

CPE INFORMATION

CPE Credit:

Main Conference: 8 Credits

Field of Study & Program Level:

Auditing, Auditing (Governmental), Taxes, Specialized Knowledge & Applications

TO REGISTER

For more information, descriptions of each session and to register go to:
cl.thomsonreuters.com

PRE-CONFERENCE:

- **Transitioning to the PPC Methodology:** Tips and advice for firms changing to the PPC audit methodology.

GENERAL SESSIONS (EVERYONE ATTENDS):

- **Strategic Briefing:** Analyzing the impact of recent standard setting activities on your practice.
- **Editors' Corner:** Responding to Common Questions from Users

CONCURRENT SESSIONS (YOU CHOOSE YOUR SESSIONS):

PPC 101: Getting the most from your audit approach

Strategic Briefing: Analyzing the impact of recent FASB and ASB activities on your practice.

SMART Series: Individual sessions focused on using PPC's SMART suite of products more efficiently.

- Risk Assessment
- Internal Controls
- Fieldwork and Disclosure
- Single Audit

2011 Guide Updates: Individual sessions updating you on the important updates to PPC's audit guides.

- Compilation and Review
- Employee Benefit Plans
- Construction and Commercial
- Yellow Book and Single Audits

The Audit Efficiency Checklist: A review of the essential components of audit productivity

Tax Update for Auditors: What you need to know about what's going on down the hall

PPC AND AUDITWATCH VIRTUAL CONFERENCE ON TAX PLANNING AND CONSULTING

This two-day virtual conference goes beyond the standard tax update to provide you with the information you need to consult with your high-income individual and small business corporate clients.

Our virtual conferences offer multiple tracks and a variety of speakers—so you can customize your web-based, live-training experience. Each conference is delivered via an interactive web-based tool that includes streaming live video!

CONFERENCE DATE AND TIME

August 4 – 5, 2011 | 8:00 am – 5:00 pm CST

CONFERENCE SPEAKERS

Speakers for this event will include Chris Province, CPA and John Stevko, CPA.



Chris Province, CPA
TaxWatch Instructor,
Thomson Reuters



John Stevko, CPA
Gear Up Instructor,
Thomson Reuters

REGISTRATION FEE:

\$379 per participant, per conference

10% Early Discount Available if Registered 30 days Prior to Event

CPE INFORMATION

CPE Credit:

Main Conference: 16 Credits

Field of Study & Program Level:

Taxes

TO REGISTER

For more information, descriptions of each session and to register go to:
cl.thomsonreuters.com

GENERAL SESSIONS (EVERYONE ATTENDS):

- **Staying Out of Trouble:** Understanding adverse judgments against firms in tax shelter and other cases
- **Strategies to Grow Your Tax Practice**
- **Multi-State Practice Issues**

CONCURRENT SESSIONS (YOU CHOOSE YOUR SESSIONS):

The Tax Consultation Checklist: An overview of the services you could be offering

Retirement and Estate Planning

Cancellation of Debt Issues / Assisting Troubled Businesses

Advising Closely-Held and Family-Owned Businesses

Choice of Entity for Uncertain Times: Comparing sole proprietorships, partnerships, LLCs, QSUBs, single-member LLCs, LLPs, S corps, and C corps

Tax Update Series: A series of individual sessions focused on critical developments in each of the following practice areas.

- Individual (50 minutes)
- Business Entities (50 minutes)
- Estate & Gift (50 minutes)

Home Ownership- A to Z

Basis, AAA, and Distributions

Real Estate and Passive Activity Losses

Elder Care Planning

Asset Protection

Compensation Planning

IRS Trends and Update

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