



**Join us and Celebrate AKCPA
60th Anniversary!**

**2014 AKCPA Annual Meeting
May 28 – May 30, 2014**

**Talkeetna Alaskan Lodge
Talkeetna, Alaska**



**Register for only \$395 by May 1st
Recommended 11 hours of CPE**

**Optional Session (4 hours CPE)
AON Risk Control Seminar
(not included in the registration fees)**

SIGN UP NOW!!



Dear Members of the Alaska Society of CPAs:

Join us in Talkeetna, Alaska, to celebrate our 60th Anniversary. Wednesday, May 28th will kick off the celebration with an optional session sponsored by AON Insurance. They will be presenting **Accountants Liability – Raise your Risk IQ** on Wednesday morning. The registration fee for the optional session is not included with the annual meeting. Please register directly with AON at **1-800- 221-3023** or using the **link** <https://forms.cpai.com/risk-management/seminarschedule.jsf>

Wednesday afternoon, Bill Balhoff, Chairman of the AICPA will lead a Town Hall meeting and discuss the AICPA priorities, initiatives, activities, major programs, advocacy and volunteerism. A reception, sponsored by AON, on Wednesday evening will start our “Walk Down Memory Lane”.

A full day of CPE lead by Donny Shimamoto, CPA and founder of Intraprise TechKnowlogies will be on Thursday. Donny’s main focus is on organizational development and advisory services for the middle market. Donny helps many organizations by bridging accounting and IT to strengthen organizational governance and risk management, improve business processes through IT and increase the effectiveness of decision-making through business intelligence and evidence-based management. Thursday evening will continue our 60th celebration with a banquet and Bill Balhoff as the guest speaker.

We encourage you to take advantage of this opportunity to contribute to your professional organization and let your voice be heard. All Society members are encouraged to attend and participate.

There will be plenty of time to meet and mingle throughout the meeting. We have some fun surprises planned. We look forward to seeing you at these events and are excited to introduce the new board and committee chairs. Please plan on joining us for a successful and fun annual meeting.

Sincerely,

Amy Cooper, President

Schedule of Events

**Wednesday
May 28, 2014**

9:00 am to 12:30 pm
AON
Risk Control Seminar
Optional CPE 4 hours

12:45 pm to 1:15 pm
Lunch

1:30 pm to 4:00 pm
Town Hall with Bill Balhoff, AICPA Chairman

4:30 pm to 7:00 pm
Opening Reception
“Walk Down Memory Lane”
Sponsored by AON

Dinner on your own

**Thursday
May 29, 2014**

8:00 am
Breakfast
8:30 am to 4:00 pm
Technology Sessions
CPE (includes lunch)

6:30 pm
Cocktail Reception
7:00 pm
Banquet and Awards

**Friday
May 30, 2013**

7:45 am to 8:15 am
Breakfast Buffet

8:30 am
Annual Business Meeting

11:00 am
Adjourn

Wednesday, May 28, 2014 9:00 am to 12:30 pm



Accountants Liability – Raise your Risk IQ

The objectives are :

- Raise awareness of behaviors that create professional liability risk exposure
- Provide practical ways to address exposure
- Utilize examples to illustrate how easily claims can occur

Please register directly with AON at 1-800-221-3023.

Wednesday, May 28, 2014 1:30 pm to 4:00 pm
AICPA Town Hall Meeting



Speaker: William “Bill” E. Balhoff is Chairman of the American Institute of CPAs for 2013-2014.

Balhoff has an extensive history of service to the CPA profession. From 2003-2004 and from 2008-2009 he served as a Member at Large of AICPA’s governing Council and from 2005-2007, he served as a member of the AICPA’s Board of Directors. Bill has been heavily involved in the AICPA’s Private Companies Practice Section (PCPS), having chaired the Executive Committee from 2001-2004 and the Strategic Assessment Task Force from 2002-2004. He has also served as a member of the Major Firms Group, Private-Held Company Financial Statements Task Force and Finance Committee, and on the AICPA Peer Review Board.

Balhoff is a past President of the Baton Rouge Chapter of the Louisiana Society of Certified Public Accountants and has served on their Board of Directors. He is a former Chair of the International Accounting Standards Board’s Assessment Special Task Force.

Balhoff is the Managing Director and CEO for Postlethwaite & Netterville, APAC. He joined P&N in 1976 and became a director in 1986. Bill has 36 years of experience in technical audit, accounting, and consulting activities. He frequently speaks on topics including professional standards and managing practices.

Bill graduated with a B.S. in Accounting from Louisiana State University.

**Thursday, May 29, 2014 CPE Sessions
Recommended for 8 total CPE Credits**

IT Strategy & Technology Update for Non-Techies (200 minutes)

Description: Technology is constantly changing and evolving. How do I determine how and where to invest my IT budget to not have something that's going to be obsolete next year? When is the right time to make certain IT purchases? What impact will the new technologies or even just new versions of software have on how I work, and when should I switch or upgrade? Do I stay on premise, move to the cloud, or work in a hybrid/half-cloud environment? This session will provide you with a business (not technical) framework that includes decision factors and guidelines, as well as updates on the current developments and trends that impact technology-related decisions.

Key Takeaways & Insights:

- Learn to utilize an IT decision-making (IT governance) framework to guide your IT staff or service providers.
- Look at current developments in Microsoft's and other key technologies and how they may impact your IT plan and budget.
- How to analyze your "cloud options" and decide which ones are the best fit for you and incorporate them into your organization's strategy.
- Understand the risks of cloud computing and different approaches to mitigating them.
- Switching the IT paradigm from cost to investment and tying to organizational strategy.

8 Keys to Success for Technology Adoption (75 minutes)

Description: Is your firm looking to improve realization rates and staff productivity? Strategically leveraging technology to improve the efficiency and effectiveness of the services you provide are key. However, many firms experience difficulty in realizing the full value that technology can provide. This session explores the lessons learned from a variety of firms that were both successful and unsuccessful in utilizing technology to automate their work processes. Learn about the eight keys that should help guide firms as they strive to maximize the return from their technology investments.

Key Takeaways & Insights:

- Learn how high performing firms perceive technology
- Learn how to develop an IT Strategy
- Learn about the 8 keys to ensure successful technology adoption

Social Media for Accountants (50 minutes)

Description: Many of us are being told that Social Media is a "must adopt" technology in the business world. Many of you probably use it on a personal level to keep in touch with family and friends, and share pictures. And many of you also may want nothing to do with Social Media. However Social Media has reached a maturity point where for some people it has replaced newspapers and, especially in the accounting world, one can often get word of new developments faster via social media than other sources. Attend this presentation to learn a strategy for using social media as an accounting resource.

Key Takeaways & Insights:

- Social media basic concepts
- The implications of social media for professional and business use
- How to use Social Media as an Accountant's Resource
- Using Twitter as a trusted news feed
- How to ask questions via LinkedIn Groups

CPA Firm Horizons: Are you setting or rising in the horizon? (50 minutes) + state society strategy exercise (25 min group)

Description: The CPA firm of the (not too distant) future looks different than today's CPA firm. Tax preparation is not a core CPA service. Audits will be more automated and technology utilization is a must rather than nice-to-have. Increased specialization and collaboration among specialists will be necessary to service clients. Scared yet? Get yourself ready for this change through a glimpse of how the CPA profession is expected to evolve as we review the results of the AICPA's CPA Horizons 2025 research study and key insights from thought leaders in the profession. Walk away with insights into what you need to do to ready your firm to be CPA firm of the future.

Key Takeaways & Insights:

- Learn how the CPA profession is expected to evolve over the next decade
- Understand the major trends impacting the profession and your firm's strategy
- Obtain insight into the skills and knowledge you will need to build in your staff to maintain your firm's relevance and win & retain clients in a competitive market

Discussion Leader

Donny Shimamoto, CPA.CITP, CGMA, is the founder and managing director of IntrapriseTechKnowlogies LLC, a CPA consultancy focused on organizational development and advisory services for the middle market. An active CPA, Certified Information Technology Professional (CITP), and Chartered Global Management Accountant (CGMA), Donny is a recognized national expert in IT management and international author/speaker on business intelligence initiatives. Donny helps many organizations by bridging accounting and IT to strengthen organizational governance and risk management, improve business processes through IT, and increase the effectiveness of decision-making through business intelligence and evidence-based management.

Donny is a current member of the AICPA Council, chairman of its IT Executive Committee, and former member of its Assurance Services Executive Committee. He has worked on several international collaborations between the AICPA and CIMA related to business intelligence and is also a frequent speaker on how management accountants can help add-value to their organizations. Donny was recognized as a Top Thought Leader in Public Accounting by CPA Practice Advisor in 2012 & 2013, received the 2009-2010 President’s Award from the Hawaii Society of CPAs, was named to CPA Technology Advisor’s 40 Under 40 list in 2007 & 2009, and was also a Hawaii Top High Tech Leader in 2004. Most recently, Donny received the AICPA's first Maximo Mukalebai Award for service to the CPA profession. Donny was part of the inaugural class of the AICPA’s Leadership Academy program and was also a member of the CPA Horizons 2015 Advisory Panel, where he served as an active voice for upcoming and emerging professionals.

Please return to: AKCPA 341 West Tudor Rd. #105 Anchorage, AK 99503 or email akcpa@ak.net

Hotel Accommodations – Identify yourself as part of the Alaska Society of CPAs to receive the group rate starting at \$165.75 plus tax. **Reservations must be made by May 14, 2014. Book your reservations by calling 1-866-845-6338**

Registration Fees

- Early Registration by May 1st – AKCPA Members Only.....\$395**
Does not include Optional Session
- Full Registration after May 1st – AKCPA Members Only..... \$450**
Does not include Optional Session
- Full Registration Non Member \$550**
Does not include Optional Session
- Guest..... \$200**
Includes meals only
- Business meeting only no charge**
- Optional Session – Not included with registration fee**
Register directly with AON Insurance at 1-800-221-3023
<https://forms.cpai.com/risk-management/seminarschedule.isf>

Registration Form

Name _____

Guest _____

Address _____

City _____ State _____ Zip _____

Phone _____

Email _____

Credit Card # _____

Expiration Date _____ CVV code _____

Please charge my account for \$ _____.

Check Enclosed \$ _____.