

# 2016

## Annual Meeting

June 2nd - 3rd, 2016  
Anchorage, AK

Sheraton Anchorage Hotel & Spa  
401 East 6th Avenue



—ALASKA SOCIETY OF CPAs—

June 1st Optional CPE Sessions  
Cybersecurity & Fraud - Risks, Threats & Solutions / 4 Hours  
QuickBooks Tips & Techniques / 4 Hours

June 2nd CPE Session  
K2's Practical Technologies for Today's Busy Professional / 8 Hours

June 3rd Annual Meeting



Dear Members of the Alaska Society of CPAs:

The AKCPA 2016 Annual Meeting will be held in Anchorage at the Sheraton Anchorage Hotel & Spa. We are offering an additional day of CPE on Wednesday, June 1<sup>st</sup> featuring K2 Enterprises', Tommy Stephens. There are 2, 4-Hour classes to choose from on Wednesday. Cybersecurity & Fraud: Risks, Threats & Solutions will be offered in the morning and QuickBooks Tips & Techniques in the afternoon. These sessions are part of the regular CPE calendar and all CPE policies apply. Registration fees are separate from the Annual Meeting registration fee.

Join us Wednesday evening for a Meet & Greet with AKCPA NextGen. I have been told this is an event that you do not want to miss. There will be appetizers, door prizes and more at the opening reception. Dinner on Wednesday evening is on your own.

Thursday includes a full day of Practical Technologies for Today's Busy Professional led by K2 Enterprises', Tommy Stephens. Thursday evening, we will board a luxury motor coach and enjoy a tour of Anchorage with surprise destinations. Join us for this fun progressive dinner back by popular demand!

The meeting will conclude with the AKCPA Annual Business Meeting on Friday morning. All members, including Associate and Student members are welcome and encouraged to attend. There is no fee for attending the Business Meeting portion of the Annual Meeting.

There will be plenty of time to meet and mingle throughout the meeting. We have some fun surprises planned and look forward to seeing you at all these events. We are excited to introduce the new Board and Committee Chairs.

You have my personal guarantee that this will be the best Annual Meeting ever!

Sincerely,

A handwritten signature in blue ink that reads "Josh McIntyre".

Josh McIntyre, President

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## **Schedule of Events**

### **Wednesday, June 1<sup>st</sup>, 2016**

**8:00 am to 11:30 am**

Cybersecurity & Fraud: Risks, Threats & Solutions

K2 Enterprises / Tommy Stephens

**Optional 4-Hours CPE (Part of the Regular CPE Calendar)**

*\*Continental Breakfast Served\**

**11:30 am**

Buffet Lunch Served for CPE Participants

**12:15 pm to 3:45 pm**

QuickBooks Tips & Techniques

K2 Enterprises / Tommy Stephens

**Optional 4-Hours CPE (Part of the Regular CPE Calendar)**

**4:30 pm**

Opening Reception Meet & Greet

Hosted By AKCPA NextGen

Appetizers, Door Prizes, Bowling & More at Center Bowl

3717 Minnesota Drive

Dinner On Your Own

### **Thursday, June 2<sup>nd</sup>, 2016**

**8:00 am to 3:45 pm**

Practical Technologies for Today's Busy Professional

K2 Enterprise's Tommy Stephens

**8-Hours CPE**

*\*Continental Breakfast & Buffet Lunch Served\**

**4:00 pm to 9:00 pm**

Luxury Motor Coach Tour & Dinner

(Exciting Surprise Anchorage Destinations)

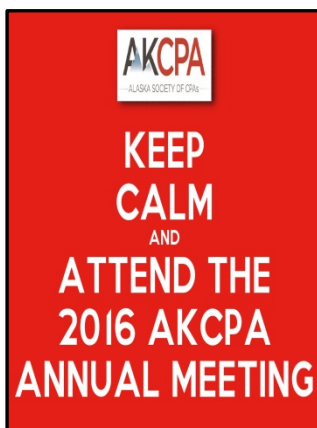
### **Friday, June 3<sup>rd</sup>, 2016**

**8:00 am** – Breakfast Buffet

**8:30 am** – Annual Business Meeting

**11:00 am** – Adjourn

**2016 AKCPA Annual Meeting  
Sheraton Anchorage Hotel & Spa  
June 2<sup>nd</sup> – 3<sup>rd</sup>, 2016**



**Register by May 11<sup>th</sup> for only \$395  
(\$50 Discount Taken At Checkout)  
Register after May 11<sup>th</sup> for \$445**

**Includes 8-Hours of CPE**

**K2's Practical Technologies for Today's Busy Professional**

**Presented By: K2 Enterprises / Tommy Stephens**

**Annual Meeting Online Registration:**

**[http://www.akcpa.org/cpe/catalog/060216-2016 annual meeting k2s practical technologies](http://www.akcpa.org/cpe/catalog/060216-2016%20annual%20meeting%20k2s%20practical%20technologies)**

**Wednesday, June 1<sup>st</sup> Optional CPE Sessions Available  
(Not Included in the Annual Meeting Registration Fees)**

**June 1<sup>st</sup>, 2016**

**Morning Session / 4-Hours CPE: Cybersecurity & Fraud: Risks, Threats & Solutions**

**Afternoon Session / 4-Hours CPE: QuickBooks Tips & Techniques**

**Presented By: K2 Enterprises / Tommy Stephens**

**Register by May 11<sup>th</sup> for only \$125 each class**

**(\$25 Discount Taken At Checkout)**

**Register after May 11<sup>th</sup> for \$150**

**Optional June 1<sup>st</sup> CPE Sessions Online Registration:**

**<http://www.akcpa.org/cpe/catalog>**

**Or Register By Mailing In The Attached Form!**

## AKCPA 2016 Annual Meeting Registration



Sheraton Anchorage Hotel & Spa Special  
AKCPA Annual Meeting Room Rate  
\$159 plus tax

**Make your reservation by May 20<sup>th</sup> to receive this rate!**

Book your reservations online or by calling:

[Alaska Society of CPAs](http://www.akcpa.org)

(OR copy and paste the following link into a web browser)

<https://www.starwoodmeeting.com/events/start.action?id=1602265683&key=1A39926D>

888-627-8046 or direct 907-276-8700

### Registration Fees

<input type="checkbox"/>	<b>AKCPA Members Only</b>		
	Early Registration by May 11 <sup>th</sup>	*****	\$395
	Full Registration after May 11 <sup>th</sup>	*****	\$445
	Includes 8-Hours CPE on June 2 <sup>nd</sup> & Annual Meeting		
	*Does Not Include June 1 <sup>st</sup> Optional CPE Sessions*		
<input type="checkbox"/>	<b>Guest</b>	*****	\$200
	*Includes Meals Only*		
<input type="checkbox"/>	<b>Non Member</b>	*****	\$445
	June 2 <sup>nd</sup> 8-Hours CPE Only		
<input type="checkbox"/>	<b>Non Member Full Registration</b>	*****	\$550
	*Does Not Include June 1 <sup>st</sup> Optional CPE Sessions*		
<input type="checkbox"/>	<b>June 1<sup>st</sup> Optional 4-Hours CPE</b>		
	<b>Morning Session</b>		
	Cybersecurity & Fraud – <i>Risks, Threats &amp; Solutions</i>		
	<b>AKCPA Members</b>	*****	\$150
	<b>Non Members</b>	*****	\$225
<input type="checkbox"/>	<b>June 1<sup>st</sup> Optional 4-Hours CPE</b>		
	<b>Afternoon Session</b>		
	QuickBooks Tips & Techniques		
	<b>AKCPA Members</b>	*****	\$150
	<b>Non Members</b>	*****	\$225
<input type="checkbox"/>	<b>Progressive Dinner Only</b>	*****	\$95

Register Online:

<http://www.akcpa.org/cpe/catalog>

**AKCPA 2016 Annual Meeting Mail-In Registration Form:**

**Name:**

**Guest Name:**

**Street Address:**

**City:**

**State:**

**Zip Code:**

**Phone:**

**Email:**

**Credit Card #:**

**Expiration Date:**

**CVV Code:**

**Please Charge My Credit Card This Amount:**

\$

**Check Enclosed:**

\$

**Please Return To:**



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## **Cybersecurity & Fraud – *Risks, Threats, and Solutions* (ITC)**

**June 1, 2016 / Morning Session**

**Sheraton Anchorage Hotel & Spa – Kuskokwim Ballroom  
401 East 6<sup>th</sup> Avenue  
Anchorage, AK**

### **LATE REGISTRATION POLICY**

For registrations received less than 21 days from the course date will be charged a late fee of \$50 for each 8 hour course and \$25 for each 4 hour course.

Cybersecurity and the frauds resulting from security breaches are, and should be, on everyone's radar. Whether you control security choices or not, you can raise your awareness and ask the right questions to begin reducing risks by participating in this session.

### **Major Topics:**

In this session, you will learn how changes in firewalls, anti-virus, encryption, and other technologies can help you to reduce the risk that your mission-critical data will become compromised. You will also learn about five common-sense steps that you can implement right away to all-but-eliminate security risk on your computer. Additionally, because cloud and mobile tools expand the footprint of your cybersecurity and fraud risk, you will learn what you need to do immediately to assess and manage the risk associated with these technologies. Finally, with identity theft growing at unprecedented levels, you will learn critical tips for avoiding identity theft.

In sum, if you are concerned about security – and who isn't? – participating in this session may be the best decision you make this year.

### **Learning Objectives:**

- Assess the relevant security risks in your organization;
- Identify specific tools and techniques to protect sensitive data;
- Define phishing and explain how it is used to gain access to systems and data;
- List five methods to improve security on a personal computer;
- Build an action plan to safeguard personal and organizational data from potential threats; and
- Implement data security best practices for personal and organizational information.

**Designed For:** Business professionals seeking to secure sensitive data

**CPE Credits:** 4, Specialized Knowledge and Applications

**Level of Knowledge:** Intermediate

**Prerequisite:** Basic understanding of computer operations

**Acronym:** ITC

**Discussion Leader:** Thomas G. Stephens, Jr., CPA.CITP, CGMA

**REGISTER ONLINE NOW:**

[http://www.akcpa.org/cpe/catalog/060116-cybersecurity\\_fraud\\_risks\\_threats\\_and\\_solutions](http://www.akcpa.org/cpe/catalog/060116-cybersecurity_fraud_risks_threats_and_solutions)

## QuickBooks Tips & Techniques (AQB)

June 1, 2016 / Afternoon Session

**Sheraton Anchorage Hotel & Spa – Kuskokwim Ballroom**  
**401 East 6<sup>th</sup> Avenue**  
**Anchorage, AK**

### LATE REGISTRATION POLICY

For registrations received less than 21 days from the course date will be charged a late fee of \$50 for each 8 hour course and \$25 for each 4 hour course.

With approximately 4 million small businesses now running QuickBooks and another 1.5 million running QuickBooks Online (QBO), accounting professionals associated with small businesses must become more familiar than ever with the best features available in QuickBooks Pro, Premier, Enterprise Solutions, and QuickBooks Online. Failing to do so leaves tremendous amounts of productivity on the table and likely results in implementing too many time-consuming and error-prone manual processes.

### Major Topics:

Participate in this session to learn about some of the best features QuickBooks has to offer to improve your productivity. Inventory management features, audit trails, importing and exporting data, bank feeds, and linking data from QuickBooks into Excel are just a few of the topics covered in this fast-paced program. Additionally, you will learn best practices for creating financial statements and cleaning up a set of books maintained in QuickBooks. If you are not using QuickBooks/QBO to its fullest or are a bit curious about the advanced features available, then you should make plans to participate in this session to learn more about what QuickBooks can do for small businesses.

### Learning Objectives:

- Manage inventory effectively, including choosing between costing options;
- Import and export data to/from QuickBooks/QBO;
- Implement features in QuickBooks to enhance internal controls;
- Utilize the Client Data Review feature to clean up a set of books;
- Implement bank feeds to streamline recording and reconciling transactions;
- Create ODBC connections to link accounting data into Excel for reporting and analysis; and
- Customize QuickBooks/QBO-based reports and set-up automatic report distribution schedules.

**Designed For:** Accounting and financial professionals who want to learn about advanced features and techniques associated with QuickBooks

**CPE Credits:** 4, Specialized Knowledge and Applications

**Level of Knowledge:** Intermediate

**Prerequisite:** Fundamental knowledge of QuickBooks

**Acronym:** AQB

**Discussion Leader:** Thomas G. Stephens, Jr., CPA.CITP, CGMA

**REGISTER ONLINE NOW:**

[http://www.akcpa.org/cpe/catalog/60116P-quickbooks\\_tips\\_techniques](http://www.akcpa.org/cpe/catalog/60116P-quickbooks_tips_techniques)



## **Annual Meeting & K2's Practical Technologies for Today's Busy Professional (AM-CPE)**

**June 2, 2016**

**Sheraton Anchorage Hotel & Spa – Kuskokwim Ballroom  
401 East 6<sup>th</sup> Avenue / Anchorage, AK**

**AKCPA Member Fee / Includes CPE, All Activities & Annual Meeting:**  
\$395 until May 1<sup>st</sup> (Login to your AKCPA Account to see discounted fee)  
\$445 after May 1<sup>st</sup>

**Non Member Fee / Includes ONLY June 2<sup>nd</sup> CPE:**  
\$445

For registrations received less than 21 days from the course date will be charged a late fee of \$50 for each 8 hour course and \$25 for each 4 hour course.

How good are you with the technology you use daily? What new technology tools are available that could save you time and make you more effective? Technology continues to accelerate rapidly, and the need to keep pace is important. If you are not an information technology (IT) expert, but need a technology update to maintain and improve your skills so that you can serve your companies and/or clients more efficiently and effectively, then this course is for you!

### **Major Topics:**

In this fast-paced, update-style course, you will survey today's IT environment, learning about computer hardware, software (including Office 2016, QuickBooks, and other accounting applications), Windows 10, and peripheral devices. You will also learn about significant trends in information technology and how to take advantage of the opportunities presented by these trends. Examples include the latest Excel features, working with PDF files, and security and privacy issues. Additionally, you will learn how to improve the overall performance of your IT investment, thereby increasing your return on investment.

Throughout this program, you will learn from real-time demonstrations of practical applications of the latest tools which can provide you with knowledge you need to harness the power of technology, both now and in the future. Register now for this "don't miss" opportunity to get the skills needed to enhance the value of your IT investment.

### **Learning Objectives:**

- Identify key hardware and software enhancements and updates that are relevant to accountants, including operating systems, desktop productivity suites, accounting software, and document management systems
- Implement key features in Microsoft Office applications, including accountant-centric features in Excel, Word, and Outlook
- Apply key features found in various accounting applications, including QuickBooks and QuickBooks Online
- List and apply key features found in Adobe Acrobat for working with PDFs, including commenting, reorganizing PDFs, securing PDFs, and creating and working with PDF forms
- Identify key security and privacy issues facing accountants, including practical tools and techniques for mitigating risk, such as data encryption, password management, biometrics, and portals

**Designed For:** Accounting and financial professionals seeking to improve their knowledge of technology and the return on their investment in technology

**CPE Credits:** 8, Specialized Knowledge and Applications

**Level of Knowledge:** Update

**Prerequisite:** None

**Acronym:** AM-CPE

**Discussion Leader:** Thomas G. Stephens, Jr., CPA.CITP, CGMA

**REGISTER ONLINE NOW:**

[http://www.akcpa.org/cpe/catalog/060216-2016\\_annual\\_meeting\\_k2s\\_practical\\_technologies](http://www.akcpa.org/cpe/catalog/060216-2016_annual_meeting_k2s_practical_technologies)



**Thomas G. Stephens, Jr., CPA.CITP, CGMA**  
**Shareholder, K2 Enterprises**  
**Woodstock, Georgia**

Thomas G. Stephens, Jr., received a Bachelor of Science in Business Administration degree (Major in Accounting) from Auburn University in 1985. Upon graduation, Mr. Stephens began working for an Atlanta-based public accounting firm. After earning his designation as a Certified Public Accountant, Mr. Stephens worked for BellSouth Corporation in Atlanta as an Internal Auditor. After two years as an auditor, he was promoted to Staff Manager and then Operations Manager of the Internal Audit Group. In 1991, he transferred to the Comptrollers' department of BellSouth and served as Manager of the Cost Accounting organization. While working full-time at BellSouth Corporation, Mr. Stephens also attended graduate school, earning a Masters of Science (Major in Finance) from Georgia State University in 1992.

Mr. Stephens left BellSouth in 1994 and opened his public accounting practice in the metropolitan Atlanta area. In his practice, Mr. Stephens provided accounting, tax, and consulting services to individuals and a wide variety of small and emerging businesses. As part of his practice, he developed a successful consulting practice providing installation and support services of small business accounting software. Additionally, he began authoring and presenting continuing professional education courses to accounting and finance professionals. In 2003, Mr. Stephens affiliated with K2 Enterprises and in 2007 he joined the firm as a partner. To date, he has lectured nationally on subjects such as internal controls for small businesses, technology strategies, computer hardware and software applications, tax strategies and compliance, and financial accounting standards and applications. Over the past nineteen years, Mr. Stephens has presented in excess of 1,900 educational sessions to over 58,000 participants nationwide.

Presently, Mr. Stephens resides in Woodstock, Georgia where, in addition to his association with K2 Enterprises, he provides consulting services to small businesses and CPA firms. In addition to an active professional career, Mr. Stephens enjoys an active personal life as well. He and Michelle -- his wife of thirty years -- have two children. His hobbies include snow skiing, fishing, and running. Additionally, Mr. Stephens maintains professional memberships with the American Institute of Certified Public Accountants and the Georgia Society of Certified Public Accountants and is a past member of the Institute of Internal Auditors.