

# AKCPA 2017 Annual Meeting

*Swimming Upstream in  
Seward, Alaska*



Harbor 360 Hotel  
1412 4th Avenue  
On The Waterfront  
May 31st - June 2nd, 2017

May 31st Optional CPE Session

AON Risk Control Seminar / Accountants Liability: Positioning Your Firm for Success / 4 Hours

May 31st CPE Session

Town Hall with Kimberly-Ellison Taylor, AICPA Chairman / 2 Hours

June 1st CPE Sessions

Trusted Client Adviser Workshop / 4 Hours

Ethical Considerations for CPAs / 4 Hours

June 2nd Annual Meeting

**AKCPA**  
ALASKA SOCIETY OF CPAs

**NEXT** ALASKA  
GEN CPAs

**AON**  
Empower Results®

Dear Members of the Alaska Society of CPAs:

The AKCPA 2017 Annual Meeting will be held May 31<sup>st</sup> – June 2<sup>nd</sup> in beautiful Seward, Alaska at the Harbor 360 Hotel.

AON will present an optional 4-Hour class in the morning on Wednesday, May 31<sup>st</sup>, Accountants Liability: Positioning Your Firm For Success. Participants completing this seminar training will receive 4 CPE and qualify for a 7.5% AICPA professional liability insurance credit for 3 years. Registration fees for this class are separate from the Annual Meeting registration fee.

Annual Meeting festivities begin at noon with lunch followed by Kimberly N. Ellison-Taylor, CPA, CGMA, Chairman of the AICPAs' Board of Directors, who will present an AICPA Issues Update & Town Hall Meeting (2 CPE). You will not want to miss the Opening Reception at the Seward Brewing Company hosted by NextGen and followed by a trip to Two Lakes Gazebo / Fire Pit featuring gourmet s'mores and other refreshments generously sponsored by AON.

Thursday begins with breakfast and a half day session of Trusted Client Adviser Workshop (4 CPE) led by Melody Feniks, CPA, CGMA. Lunch is served followed by Ethical Considerations for CPAs (4 CPE) presented by Amy K. Cooper, CPA, CGMA and Denise Singery, CPA. Thursday evening, we board the Star of the Northwest for a 3-Hour dinner cruise on Resurrection Bay!

The meeting will conclude on Friday morning with breakfast and the Annual Business Meeting. 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 event. As always, we have some fun surprises planned and look forward to seeing you at all of these events. We are excited to introduce the new Board and Committee Chairs.

This Annual Meeting will be "hugely tremendous"!

Sincerely,



Rebecca L. Martin, President

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## **Schedule of Events**

**\*\*Casual attire is perfectly appropriate!\*\***

### **Wednesday, May 31<sup>st</sup>, 2017**

**8:30 am to 12:00 pm**

Accountants Liability: Positioning Your Firm For Success

AON / Arthur V. Pearson

**Optional 4-Hours CPE (Separate Registration Fee)**

*\*Breakfast Served\**

**12:00 pm**

Buffet Lunch Served

**1:00 pm to 3:00 pm**

AICPA Issues Update & Town Hall Meeting (2-Hours CPE)

Kimberly N. Ellison-Taylor, Chairman of the AICPA's Board of Directors

**5:00 pm to 7:00 pm**

Opening Reception at Seward Brewing Company

Appetizers, Door Prizes & More!

Hosted By AKCPA NextGen

*\*Transportation Provided\**

**7:00 pm to 9:00 pm**

First Lakes Gazebo / Fire Pit

Featuring Gourmet S'Mores & Fire Pit Refreshments!

Sponsored By AON

*\*Transportation Provided\**

### **Thursday, June 1<sup>st</sup>, 2017**

**8:00 am to 12:00 pm**

Trusted Client Adviser Workshop (4-Hours CPE)

Melody Feniks, CPA, CGMA

*\*Breakfast Served\**

**12:00 pm**

Buffet Lunch Served

**1:00 pm to 5:00 pm**

Ethical Considerations For CPAs (4-Hours CPE)

Amy K. Cooper, CPA, CGMA and Denise Singery, CPA

**6:00 pm to 9:00 pm**

Resurrection Bay Dinner Cruise on The Star of the Northwest

### **Friday, June 2<sup>nd</sup>, 2017**

**8:00 am** – Breakfast Buffet

**8:15 am** – Annual Business Meeting

**11:30 am** – Adjourn

**2017 AKCPA Annual Meeting  
Harbor 360 Hotel / Seward, Alaska  
May 31<sup>st</sup> – June 2<sup>nd</sup>, 2017**



**Register by May 10<sup>th</sup> for only \$445**

**(\$50 Discount Taken At Checkout)**

**Register after May 10<sup>th</sup> for \$495**

**Includes 10-Hours of CPE**

**AICPA Issues Update & Town Hall Meeting (2-Hours CPE)**

**Presented By: Kimberly N. Ellison-Taylor, Chairman of the AICPAs' Board of Directors**

**Trusted Client Adviser Workshop (4-Hours CPE)**

**Presented By: Melody Feniks, CPA, CGMA**

**Ethical Considerations For CPAs (4-Hours CPE)**

**Amy K. Cooper, CPA, CGMA and Denise Singery, CPA**

**\*This course satisfies 4-Hour Ethics requirement\***

**Annual Meeting Online Registration:**

**[http://www.akcpa.org/cpe/catalog/053117-2017 annual meeting ethics trusted adviser workshop](http://www.akcpa.org/cpe/catalog/053117-2017%20annual%20meeting%20ethics%20trusted%20adviser%20workshop)**

**Wednesday, May 31<sup>st</sup> Optional 4-Hour CPE Session Available**

**Accountants Liability: Positioning Your Firm For Success**

**AON / Arthur V. Pearson**

**(Not Included in the Annual Meeting Registration Fees)**

**Register by May 10<sup>th</sup> for only \$125**

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

**Register after May 10<sup>th</sup> for \$150**

**Optional May 31<sup>st</sup> CPE Session Online Registration:**

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

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



**AKCPA 2017 Annual Meeting Registration**

Harbor 360 Hotel Special  
 AKCPA Annual Meeting Room Rates  
 Standard Room \$189 plus taxes  
 Harbor View Room \$219 plus taxes

**RESERVE YOUR ROOM NOW TO  
 GUARANTEE AVAILABILITY...SPACE IS LIMITED!**

Book your reservations by calling:  
 907-865-6224

**You must mention the Alaska Society of CPAs to receive group rate**

Seward Lodging Located Near Harbor 360 Hotel:

Harborview Inn (approximately 4 blocks from Harbor 360 Hotel)

Alaska Society of CPAs rate: \$99 + taxes up to double occupancy (\$10 each additional person)

Contact Mary at 907-224-3217 to make your reservations or online at <http://www.sewardhotel.com/>

**If you make reservations online indicate in the NOTE section that you are with the  
 Alaska Society of CPAs and your reservation rate will be adjusted.**

Breeze Inn (Seward harbor area)  
<http://www.breezeinn.com/>

**Registration Fees**

**Season Pass / Season Tickets Not Valid For This Event**

- AKCPA Members Only**
- Early Registration by May 10<sup>th</sup> \*\*\*\*\* \$445
- Full Registration after May 10<sup>th</sup> \*\*\*\*\* \$495
- Includes 10-Hours CPE, Meals & All Annual Meeting Events
- \*Does Not Include May 31<sup>st</sup> Optional CPE Session\*
- Guest** \*\*\*\*\* \$250
- \*Includes Meals, Opening Reception & Dinner Cruise\*
- Non Member** \*\*\*\*\* \$445
- June 1<sup>st</sup> 8-Hours CPE Only
- Non Member Full Registration** \*\*\*\*\* \$650
- \*Does Not Include May 31<sup>st</sup> Optional CPE Session\*
- May 31<sup>st</sup> Optional 4-Hours CPE Morning Session**
- AON / Accountants Liability: Positioning Your Firm For Success
- AKCPA Members register before May 10th** \*\*\*\*\* \$125
- AKCPA Members register after May 10th** \*\*\*\*\* \$150
- Non Members** \*\*\*\*\* \$225
- Dinner Cruise Only** \*\*\*\*\* \$100

**Register Online:**

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

**AKCPA 2017 Annual Meeting Mail-In Registration Form:**

**Name:**

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**Guest Name:**

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**Street Address:**

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**City:**

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**State:**

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**Zip Code:**

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**Phone:**

---

**Email:**

---

**Credit Card #:**

---

**Expiration Date:**

---

**CVV Code:**

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

\$

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**Check Enclosed:**

\$

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**Please Return To:**



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## Accountants Liability: Positioning Your Firm for Success (AON)



Empower Results®

**May 31, 2017 / Morning Optional CPE Session**

**Harbor 360 Hotel**

**1412 4<sup>th</sup> Avenue**

**Seward, 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.

How do you view professional liability risk management? An administrative burden? A draw on firm resources? What if you viewed risk management in a different light? Strong risk management practices can help establish a solid foundation for your firm and position it for growth and business success.

Participants completing this seminar training will receive 4 CPE and qualify for a 7.5% AICPA professional liability insurance credit for 3 years.

### **Learning Objectives:**

In this course, participants will learn about key professional liability risk management practices that, when implemented, can help mitigate the risk of an accounting malpractice claim and may also help improve business performance.

By the end of this course, participants will be able to:

- understand the building blocks of professional liability risk management and how to strengthen them in order to improve performance
- analyze claim data by area of practice and understand the implications for the firm
- discuss risk exposures by area of practice and how to better manage them to improve service delivery

**Designed For:** Accounting professionals

**CPE Credits:** 4, Regulatory

**Level of Knowledge:** Overview

**Prerequisite:** None

**Acronym:** AON

**Discussion Leader:** Arthur V. Pearson

**REGISTER ONLINE NOW:**

[http://www.akcpa.org/cpe/catalog/53117A-aon\\_accountants\\_liability\\_positioning\\_your\\_firm\\_for\\_success](http://www.akcpa.org/cpe/catalog/53117A-aon_accountants_liability_positioning_your_firm_for_success)

## **Annual Meeting / 10-Hours CPE (AM-CPE)**

**AICPA Issues Update & Town Hall Meeting (2-Hours CPE)**

**Trusted Client Adviser Workshop (4-Hours CPE)**

**Ethical Considerations For CPAs (4-Hours CPE)**

**May 31<sup>st</sup> / Afternoon Session – June 2<sup>nd</sup>, 2017**

**Harbor 360 Hotel**

**1412 4<sup>th</sup> Avenue**

**Seward, AK**

**AKCPA Member Fee / Includes 10-Hours CPE, Meals & All Annual Meeting Events:**

\$445 until May 10<sup>th</sup> (Login to your AKCPA Account to see discounted fee)

\$495 after May 10<sup>th</sup>

**Non Member Fee / Includes ONLY June 1<sup>st</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.

### **AICPA Issues Update & Town Hall Meeting**

#### **May 31, 2017 / Afternoon Session**

Kimberly N. Ellison-Taylor, CPA, CGMA, is Chairman of the American Institute of CPAs' Board of Directors.

Ellison-Taylor has a lengthy history of volunteering for the profession, including serving as a member of the AICPA Business and Industry Executive Committee as well as the AICPA Board of Directors where she served as a member of the Audit and Finance committees. Ellison-Taylor also worked with the Benevolent Fund, and has served as a Council representative.



She is a past Chair of the Maryland Association of CPAs, and has served on many of its committees, including the New Young Professional Network and Tomorrow's CPA.

Ellison-Taylor is currently the Global Accounting Strategy Director for the Financial and Professional Services Industries for Oracle America, a leader in cloud solutions and enterprise technology. In this capacity, she provides insight to help drive innovation in this important domain, particularly as the computing paradigm shifts to Cloud and SaaS.

Previously, she served as the Global Practice team leader for Health and Human Services, working with teams worldwide where she developed and executed strategies on Cloud, Big Data, Security, Fraud Prevention/Detection, Customer Experience, and Modernization. Prior to Oracle, Kimberly worked in leadership roles at numerous other major companies and organizations, including the NASA Goddard Space Flight Center; Motorola; KPMG; and Prince George's County Government, where she served as Chief Information Technology Officer.

Ellison-Taylor received her bachelor's degree from the University of Maryland, Baltimore County; an Accounting Certificate from the Community College of Baltimore County, an MBA from Loyola University and Master's of Science in Information Technology and a Chief Information Officer Certificate from Carnegie Mellon University.

She currently resides in Maryland with her husband and two sons.

## **Trusted Client Adviser Workshop (AM-CPE)**

### **June 1, 2017 / Morning Session**

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:**

No matter your level in the firm, you can become a strategic partner to your clients and translate day-to-day client challenges into consulting opportunities. This workshop provides a process and supporting tools to assist you in engaging in meaningful client dialogue, transforming client service and growing your practice.

This workshop is a combination of live presentation, video, workbook and role plays. Facilitated by practitioners currently using the process in their own firms, the workshop will provide practical guidance and real-life examples on how to implement this service model.

#### **Learning Objectives:**

When you complete this course you will be able to:

- Understand the changing professional landscape and the need for increased client service.
- Knowledgeably and confidently articulate your ideas and present yourself to clients.
- Engage in client need assessment discussions and get to the source of what keeps your clients awake at night.
- Think beyond core accounting services and consider holistic, strategic and proactive advice and ideas.
- Enhance your firm's atmosphere and cohesion.

#### **Topics Discussed:**

- Current professional trends
- Understanding, articulating and pricing value
- Engaging in thought provoking conversations utilizing specific listening and questioning techniques
- Preparing for and conducting an initial client consultation and client proposal meeting

**Designed For:** Sole practitioners, CPAs, and partners in small to midsize firms and staff looking to take on more leadership roles.

**CPE Credits:** 4, Business Management and Organization

**Level of Knowledge:** Intermediate

**Prerequisite:** Knowledge and experience with providing client services

**Acronym:** AM-CPE

**Discussion Leader:** Melody Feniks, CPA, CGMA

## **Ethical Considerations For CPAs (AM-CPE)**

*\*This course satisfies 4-Hour Ethics requirement\**

### **June 1, 2017 / Afternoon Session**

CPAs today face greater challenges than ever to maintain the high ethical standards of their profession. This course provides a framework within which to consider the ethical challenges facing CPAs and focuses on ethical requirements that CPAs must adhere to in their everyday practice, including practical examples of potential ethical dilemmas that practitioners may encounter.

#### **Major Topics:**

- The CPA's role in today's economy
- The similarities and differences between individual and business ethics
- The link between ethics, integrity and scruples
- The basic attributes of ethics and professional conduct
- The history of the CPA profession and the CPA's requirement to adhere to ethics policies and codes of conduct
- The AICPA's Code of Professional Conduct and a CPA's responsibility to the public, clients, and colleagues
- The common rules and statues faced daily in the CPA profession.

Case studies may also be utilized to present potential ethical dilemmas CPAs may face during their careers.

#### **Learning Objectives:**

- Understand the attributes of ethics and professional conduct
- Identify ethical issues that occur every day in the work environment
- Understand those deliberative, emotional, and social skills that enable a CPA to put their knowledge of the rules into practice in ways that are applicable to any situation

**Designed For:** All CPAs

**Level of Knowledge:** Intermediate

**CPE Credits:** 4, Behavioral Ethics

**Prerequisite:** Experience in financial reporting

**Acronym:** AM-CPE

**Discussion Leader:** Amy K. Cooper, CPA, CGMA and Denise Singery, CPA

**REGISTER ONLINE NOW:**

[http://www.akcpa.org/cpe/catalog/053117-2017\\_annual\\_meeting\\_ethics\\_trusted\\_adviser\\_workshop](http://www.akcpa.org/cpe/catalog/053117-2017_annual_meeting_ethics_trusted_adviser_workshop)