



Accounting & Financial Women's Alliance
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The Association of
Accountants and
Financial Professional
in Business

2016 EMPOWERING TODAY'S ACCOUNTANT SEMINAR PROGRAM

Saturday August 27, 2016

Desert Willow Conference Center

4340 E Cotton Center Blvd Phoenix, AZ 85040

Today's accounting and financial professionals are more than just number crunchers. They are business leaders creating a prosperous future for their company as well as their clients. This critical function requires a combination of strong technical and professional skills along with integrity and a supportive network of peers. Professional accounting and finance associations benefit their individual members as well as the entire professional community. They provide great resources for professionals on technical issues, support for ethical dilemmas, best practices and networking opportunities.

Take advantage of this opportunity to support you lifelong learning and support local professional associations. The Accounting & Financial Women's Alliance Mesa East Valley Chapter and the AZ Valley of the Sun Chapter of the Institute of Management Accountants are presenting this seminar to allow all accounting and financial professionals an opportunity to learn and connect with their peers. Support your profession and make a small investment in your career by joining the members of the AFWA and IMA for the 10th Annual Empowering Today's Accountant Seminar.

SPECIAL THANKS TO OUR SPONSORS



CliftonLarsonAllen



SEMINAR AT A GLANCE

- 7:30-8:10** Registration, Refreshments and Announcements
- 8:10-9:00** Title: Effective Not for Profit Board Leadership
Session 1 Speaker: Sarah Zelhart
- 9:10-10:00** Title: Business Value - Creation and Realization
Session 2 Speaker: Michael Mobley
- 10:10-11:00** Title: Strategic Thinking 101
Session 3A Speaker: Stacy Johnson
- 10:10-11:00** Title: The CPA Exam – What You Need to Know
Session 3B Speaker: Lorise Reed
- 11:10-12:00** Title: I Owe Taxes, Now What?
Session 4A Speaker: Yesenia Barraza
- 11:10-12:00** Title: How to Become a Criminal Investigator with the IRS
Session 4B Speaker: Richard Robinson
- 12:00-1:00** Professional Networking Lunch
Student Career Planning Lunch
- 1:00-1:50** Title: Accounting Update part 1
Session 4A Speaker: Joyce Barden
- 1:00-1:50** Title: Personal Finance
Session 4B Speaker: Rhonda Culver
- 2:00-2:50** Title: Accounting Update part 2
Session 5A Speaker: Joyce Barden
- 2:00-2:50** Title: Become a Confident Speaker
Session 5B Speaker: Stephanie Hoffman
- 3:00-3:50** Title: Auditing Updates
Session 6A Speaker: Chad Kunze
- 3:00-3:50** Title: Team Building and Communications
Session 6B Speaker: Dr. John MacCatherine
- 3:50-4:10** Networking Break—Refreshments, Raffle
- 4:10-5:00** Title: Internal Controls
Session 7 Speaker: Robert Minnitti

SEMINAR SCHEDULE

7:30 a.m. – 8:00 a.m. Registration and Refreshments

8:10 a.m. – 9:00 a.m.

Title: Effective Not for Profit Board Leadership
Speaker: Sarah Zelhart
Field of Study: Professional Development
Level of Knowledge: Overview
CPE Credit: 1 Hours
Session Description:

9:10 a.m. – 10:00 a.m.

Title: Business Value - Creation and Realization
Speaker: Michael Mobley
Field of Study: Management Advisory Services
Level of Knowledge: Intermediate
CPE Credit: 1 Hour
Session Description: This presentation discusses the importance for entrepreneurs to lead and manage for value creation, rather than merely profit, or other singular criteria. The presentation also highlights the challenges to a business owner of obtaining the value of their business and how to overcome those challenges.

10:10 a.m. – 11:00 a.m.

Title: Strategic Thinking 101
Speaker: Stacy Johnson
Field of Study: Professional Development
Level of Knowledge: Basic
CPE Credit: 1 Hour
Session Description: Strategic thinking is a foundation of leadership in today's busy and complex world. We must act on information rapidly and synthesize it into action quickly. Whether it's navigating a Saturday afternoon with 3 kids with 3 commitments and just 1 driver or advising your organization on the best project to invest in, it's necessary to think and act strategically. This session will use hands-on experiential learning techniques. Attendees will assess their personal acumen for 6 areas of strategic thinking, practice using the techniques and develop methods for identifying and utilizing strategic thinking in their current and future life.

10:10 a.m. – 11:00 a.m. Student Track

Title: The CPA Exam – What You Need to Know
Speaker: Lorise Reed
Field of Study: Professional Development
Level of Knowledge: Basic

CPE Credit: 1 Hour

Session Description: For over 50 years, Becker has been the proven leader in CPA Exam Review, offering the most effective and efficient way to pass the exam the first time. Lorise will share important information on the exam and the Becker Review course.

11:10 a.m. – 12:00 a.m.

Title: I Owe Taxes, Now What?

Speaker: Yesenia Barraza

Field of Study: Taxes

Level of Knowledge: Overview

CPE Credit: 1 Hour

Session Description: A spokesperson for the U.S. Internal Revenue Service estimated that 8.2 million Americans owed over \$83 billion in back taxes, penalties and interest. If you or someone you know is dealing with this issue then this seminar is for you. Come learn about the IRS collection process, your options and solutions for dealing with tax debt.

11:10 a.m. – 12:00 a.m. Student Track

Title: How to Become a Criminal Investigator with the IRS

Speaker: Richard Robinson

Field of Study: Professional Development

Level of Knowledge: Overview

CPE Credit: 1 Hour

Session Description:

12:00 p.m. – 1:00 p.m. Professional Networking Luncheon

12:00p.m. – 1:00p.m. Student Career Planning Lunch sponsored by CliftonLarsonAllen

1:00 p.m. – 1:50 p.m.

Title: Accounting Update part 1

Speaker: Joyce Barden

Field of Study: Accounting

Level of Knowledge: Update

CPE Credit: 1 Hour

Session Description: An Accounting/SEC/COSO Update of “what is happening” in our world of Accounting to include: Recent Accounting/SEC/COSO Updates and what’s new from the AAA (American Accounting Association). This presentation will include updates recently provided by the Accounting Experts of the FASB, SEC, PCAOB, COSO, and IFRS, etc.

1:00 p.m. – 1:50 p.m.

Title: Personal Finance

Speaker: Rhonda Culver

Field of Study: Administrative Practice

Level of Knowledge: Basic

CPE Credit: 1 Hour
Session Description:

2:00 p.m. – 2:50 p.m.

Title: Accounting Update part 2

Speaker: Joyce Barden

Field of Study: Accounting

Level of Knowledge: Update

CPE Credit: 1 Hour

Session Description: An Accounting/SEC/COSO Update of “what is happening” in our world of Accounting to include: Recent Accounting/SEC/COSO Updates and what’s new from the AAA (American Accounting Association). This presentation will include updates recently provided by the Accounting Experts of the FASB, SEC, PCAOB, COSO, and IFRS, etc.

2:00 p.m. – 2:50 p.m.

Title: Become a Confident Speaker

Speaker: Stephanie Hoffman

Field of Study: Personal Development

Level of Knowledge: Overview

CPE Credit: 1 Hour

Session Description:

3:00 p.m. – 3:50 p.m.

Title: Auditing Updates

Speaker: Chad Kunze

Field of Study: Auditing

Level of Knowledge: Update

CPE Credit: 1 Hour

Session Description:

3:00 p.m. – 3:50 p.m.

Title: Team Building and Communications

Speaker: Dr. John MacCatherine

Field of Study: Communication

Level of Knowledge: Overview

CPE Credit: 1 Hour

Session Description: Through interactive exercises, this session will explore the process of team development, the role that communication plays in team function, and factors that can impact communication effectiveness.

3:50 p.m. – 4:10 p.m. Networking & Refreshment Break

4:10 p.m. – 5:00 p.m.

Title: Internal Controls

Speaker: Robert Minniti, CPA, CFE, Cr.FA, CVA, CFF, MAFF, CGMA, MBA

Field of Study: Auditing

Level of Knowledge: Basic

CPE Credit: 1 Hour

Session Description: This course is designed to provide a history of internal controls in the US as well as the requirements for having internal controls. We will discuss the COSO Framework for Internal control and how it applies to businesses. We will review the 2006 COSO Framework for SMEs and the 2013 updates to the framework. We will discuss various risks and types of internal controls. This course is appropriate for CPAs, CFEs, CFFs, MAFFs, CIAs, CMAs, CFOs, CEOs, business owners, business managers, internal auditors, external auditors, corporate accountants, government accountants and risk management personnel. Attendees will learn the basics of internal controls, understand the history and requirement for internal controls, and review the COSO Framework for Internal Controls.

SPEAKER BIOGRAPHIES

Michael Mobley

Michael Mobley is a Founder and Managing Partner of Impetus Solutions, LLC. Michael is a seasoned business executive with extensive experience in finance, planning, operations, marketing and executive coaching with both large corporations and small businesses. After ending his corporate career in 2001, Michael founded his first small business consulting practice based in Maryland, with a focus on strategy, planning, coaching and training. His clients included construction firms, IT companies, professional services consultants, retail firms, hospitality companies and not-for-profit organizations. He served as an adjunct professor of entrepreneurship at a Maryland community college and an adjunct professor of business in the MBA program of a Maryland university. He has also managed firms that provided venture capital and non-traditional loans to small businesses. Michael received his BA in Economics from Columbia University and his MBA in Finance, also from Columbia University.

Joyce Barden, CPA, CGMA, CBM, MBA

Joyce is a Senior Professor/Accounting Program Chair for DeVry University and Keller Graduate School in the College of Business and Management. Specialization is teaching Financial, Intermediate Accounting, Auditing, Internal Auditing and Fraud/Forensics courses. Recipient of the DeVry “PRIDE Faculty Award” and Distinguished Professor Awards. She has spent 20+ years in Controller and Internal Audit positions with AT&T, Honeywell and Sperry Corporation as well as previous public accounting experience. Licensed in the State of Arizona, Joyce is a member of the American Institute of CPA’s (AICPA), Arizona Society of CPA’s (ASCPA), Association of Certified Fraud Examiners (ACFE) and Arizona Association of Certified Fraud Examiners (AZCFE), American Accounting Association (AAA), American Society of Women Accountants (ASWA), Association of Certified Business Professionals (ACBM) and has served for two years on the Board of Directors of the Arizona Society of CPA’s. She has also served on the Board of Directors for the Arizona Business Education Advisory Council for the past 20+ years. Former graduate of Keller Graduate School of Management and is a Becker Alum. Her passion is teaching and assisting students/graduates in obtaining accounting career opportunities.

Lorise Reed

Lorise Reed is the Senior Account Manager for Becker covering Arizona, New Mexico and the Four Corners area. She has worked for Becker for over 20 years and in her position works with university accounting programs and CPA firms in getting important information to students and CPA candidates about the exam and the application process.

Richard Robinson, CPA

Richard Robinson has been with the Internal Revenue Service – Criminal Investigation Division for the past 10+ years as a Special Agent. Prior to that he started his career in Public Accounting for 3 years. Richard is a graduate of DeVry University’s Accounting Program in 2001 and he received his MBA from Keller Graduate School of Management in 2005.

Yesenia Barraza, CPA, M.Tax

Yesenia Barraza is a Certified Public Accountant and the founder YB Company LLC a firm in Central Phoenix that provides exceptional tax, accounting and consulting services to businesses and individuals. Ms. Barraza has been recognized as a recipient of the “40 Hispanic Leaders Under 40 Award” by AZ Hispanic Chamber of Commerce. She received the Student Hall of Fame Award from the WP Carey School of Business at Arizona State University where she earned a Masters in Taxation. Yesenia is a member of the Arizona Society of CPAs and the President of Dobson Ranch Toastmasters. She also serves on the ASU National Alumni Council and is a Board Member of the Girl Scouts Arizona Cactus Pine Council. Ms. Barraza is a frequent volunteer and speaker at various organizations including the Better Business Bureau & Local First Arizona. She has a passion to increase financial knowledge in the community, loves to read, exercise, travel, and golf.

Robert Minniti, CPA, CFE, Cr.FA, CVA, CFF, MAFF, CGMA

Bob Minniti is the President and Owner of Minniti CPA, LLC. Bob is a Certified Public Accountant, Certified Forensic Accountant, Certified Fraud Examiner, Certified Valuation Analyst, Certified in Financial Forensics and is a Diplomate of the American Board of Forensic Accounting. Bob is also a licensed real estate broker in the State of Arizona. Bob is currently pursuing a doctoral degree in business administration at Walden University. Bob received his MBA degree and Graduate Certificate in Accounting from DeVry University’s Keller Graduate School of Management, and received his Bachelor of Science in Business Administration degree from the University of Phoenix. Bob is a professor teaching graduate level courses in accounting, fraud examination, fraud criminology, ethics, forensic accounting, external audit, internal audit, tax, and real estate finance at DeVry University, and the University of Phoenix. He is a writer and public speaker. He has experience in forensic accounting, fraud examinations, financial audits, internal audits, compliance audits, real estate valuations, business valuations, real estate financing, internal control development, business continuation planning, taxes, risk management, financial forecasting and Sarbanes-Oxley compliance work. Bob is an instructor teaching continuing professional education classes for the Arizona Society of Certified Public Accountants and the American Institute of Certified Public Accountants. Bob is a board member on the Executive Advisory Board of the American Board of Forensic Accounting. Bob is also on the Board of the North Phoenix Chamber of Commerce.

Stephanie Hoffman is currently Vice President of Public Relations for Aetna Phoenix Toastmasters in Phoenix and Treasurer & Immediate Past President for Leaders Plus Toastmasters in Mesa. She is the Assistant Area Director for the Zuni 2 Area and a Curriculum Committee Member & Facilitator/trainer for The Toastmasters Leadership Institute, which provides continuous education for club officers across the state of Arizona, where she specializes in teaching Effective & Motivational Evaluation. Stephanie previously held the office of Vice President of Education (2013-2014) for the Bank of America Toastmasters club in Chandler and holds the Toastmasters International designations of Advanced Leader Bronze and Advanced Communicator Bronze. She has earned a BS in Finance, a BA in German and an MBA from ASU, W.P. Carey School of Business. She has 12 years’ experience in mortgage lending and currently works as a Sr. Financial Analyst in new business & special projects at Aetna Medicaid.

Dr. John MacCatherine

Dr. MacCatherine is an industry veteran with over twenty years of consulting and management experience, sixteen of which was dedicated to professional services leadership roles within Microsoft’s Enterprise Consulting Services division. Over the past ten years, Dr. MacCatherine has developed expertise related to full-lifecycle talent management, including talent acquisition,

performance management, and career development for teams of professional consultants across the United States. In addition to his professional experience, Dr. MacCatherine holds a Master's degree in Industrial/Organizational Psychology and a PhD in Organization and Management. Dr. MacCatherine is also certified as a Senior Professional in Human Resources (SPHR) and a Project Management Professional (PMP). Currently, Dr. MacCatherine is the Faculty Chair for the College of Business and Management at DeVry University/Keller Graduate School of Management and a full-time Professor teaching graduate and undergraduate courses in management, human resource management, and project management.

Stacy Johnson is the Americas eMarketing Manager in the Field Marketing Organization at Keysight Technologies, formerly Agilent Technologies' Electronic Measurement Group. Stacy leads a team that specializes in using the power of the internet as a business marketing tool while accelerating lead capture for multiple sales channels. The programs from Stacy's team touch thousands of prospects and contacts per month generating potential business. Hands on roles in application engineering, process engineering, and product marketing have provided great experience leading up to this role. Stacy is a wife and mother of three boys and a dog. She enjoys playing soccer, spending time with her Zeta Tau Alpha sisters and volunteering for the Go Red! for Women cause. Stacy started volunteering with Go Red! and the American Heart Association due to a family history of heart disease. In recent years that passion has evolved to include fitness coaching with an alignment to Team Beachbody as an Independent Coach helping people lead healthier and more fulfilling lives. Stacy holds a BS and MS in mechanical engineering from the Rochester Institute of Technology and a Master Certificate in Project Management from George Washington University.

GENERAL INFORMATION

CPE CREDIT

The Accounting & Financial Women's Alliance is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

A CPE form is included in your attendee materials. Please complete both copies and have the certificate signed. Return the pink copy of your form to the registration desk before leaving the seminar. Keep the white copy for your records. A program evaluation is also provided in your registration packet. Please take the time to complete the form as your feedback is very important to us and assists us with planning future events. Please return your evaluation form to the Registration Desk.

All sessions are group live and have no prerequisite or advanced preparation required.

SEMINAR CONTACTS:

Laura Mangan at lauralynne@earthlink.net or 480-276-5926

CHAPTER WEBSITES:

AFWA Mesa East Valley Chapter: www.mesaeastvalleyafwa.org

IMA AZ Valley of the Sun Chapter: www.imavalleyofthesun.org

AFWA History & Mission

The Accounting & Financial Women's Alliance (formerly the American Society of Women Accountants) was formed in 1938 to increase the opportunities for women in all fields of accounting and finance. The first chapter was chartered in Indianapolis, Indiana. Members and their companies benefit from practical resources and programs that strengthen their professional growth. Accounting & Financial Women's Alliance members tap into an extensive knowledge base of accounting and finance professionals with technical expertise to provide solutions for the most complex issues. The majority of our members have attained professional certifications such as CPA, CMA, CIA, and CFP. The mission of the Accounting & Financial Women's Alliance is to enable women in all accounting and related fields to achieve their full personal, professional and economic potential and to contribute to the future development of their profession. www.afwa.org

IMA History & Mission:

With a network of about 60,000 professionals, the Institute of Management Accountants (IMA) provides a dynamic forum for management accounting and financial professionals to develop and advance their careers through its Certified Management Accountant (CMA[®]) program, cutting-edge professional research and practice development education, networking, and the advocacy of the highest ethical and professional practices. IMA is dedicated to rebalancing the accountancy profession by educating society regarding the business building role of management accountants and finance professionals working inside organizations. The mission of IMA is to empower accountants and financial professionals to become "trusted business advisors" playing a driving role in their organizations' business success and advancing their careers. www.imanet.org

**2016 Empowering Today's Accountant Seminar
Desert Willow Conference Center - Phoenix, AZ
Saturday August 27, 2016
Registration Form**



AZ Valley
of the Sun
Chapter

	Regular Registration	Early Registration
AFWA / IMA Member Registration:	\$150	\$125
Other Association Registration:	\$200	\$175
Regular Registration:	\$250	\$225
Student Registration:	\$25	\$25

Early Registration Deadline: July 15, 2016

Final Registration Deadline: August 20, 2016

Name

Company

Address

Title

Email

Phone

Please include email address. Confirmation emails will be sent prior to event. Space is limited.

Please make checks payable to AFWA and mail with completed registration form to:

AFWA P.O. Box 41294 Mesa, AZ 85274

AFWA Tax ID # 86-0545075

If you are unable to attend, you may send a colleague in your place. Refunds will only be issued for reservations canceled prior to the final registration due date. For more information regarding administrative policies, please contact AFWA Mesa East Valley Chapter Seminar Chair, Laura Mangan at chapter@mesaeastvalleyafwa.org or call 480-276-5926.

Online registration and credit card payment option available at www.mesaeastvalleyafwa.org/seminars.