



Accounting & Financial Women's Alliance
CONNECT • ADVANCE • LEAD



The Association of
Accountants and
Financial Professional
in Business

2018 EMPOWERING TODAY'S ACCOUNTANT SEMINAR PROGRAM

Friday May 18, 2018

Sheraton Mesa Hotel at Wrigleyville West
860 N Riverview, Mesa, AZ 85201

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 12th Annual Empowering Today's Accountant Seminar.

SPECIAL THANKS TO OUR SPONSORS



SEMINAR AT A GLANCE

- 7:30-8:10** Registration, Breakfast and Announcements
- 8:10-9:00** Title: Branding for Accountants
Session 1 Speaker: Danetha Doe
- 9:10-10:00** Title: Technical Accounting Standards Update
Session 2 Speaker: Scott Wallace
- 10:10-11:00** Title: Get on Board! - An Inside Look at the Fiduciary Role of Nonprofit Board Members
Session 3 Speaker: Jill Shaw
- 11:10-12:00** Title: Preparing for a Healthier Future
Session 4 Speaker: George Rambow
- 12:00-12:50** Networking Lunch
- 12:50-1:40** Title: Developing Your Leadership Skills
Session 5 Speaker: Beth Golightly
- 1:50-2:40** Title: Benefit Plan Audits from both the Employer and Auditor Perspective
Session 6 Speaker: Karlye Broten
- 2:40-3:10** Refreshment, Networking & Foundation Fundraising Break
- 3:10-4:00** Title: Accountants Skills Needed for Innovation, Governance and Managing Change
Session 7 Speaker: Steve Mason
- 4:10-5:00** Title: Sales Tax Hot Topics
Session 8 Speaker: Monika Miles

SEMINAR SCHEDULE

7:30 a.m. – 8:00 a.m. Registration & Continental Breakfast

8:10 a.m. – 9:00 a.m.

Title: Branding for Accountants

Speaker: Danetha Doe

Field of Study: Communications & Marketing

Level of Knowledge: Basic

CPE Credit: 1 Hour

Learning Objectives and Program Content: In this interactive presentation, Danetha will go over how technology is impacting the role of accountants and share the #1 skill you need to develop to remain ahead of the curve: branding. You will learn how to articulate your unique strengths to attract ideal clients and communicate your value within your firm. At the end of this presentation, you will walk away with the exact steps to position yourself as a thought leader.

9:10 a.m. – 10:00 a.m.

Title: Technical Accounting Standards Update

Speaker: Scott Wallace, CPA

Field of Study: Accounting

Level of Knowledge:

CPE Credit: 1 Hour

Learning Objectives and Program Content: This session will focus on recent accounting standards updates including Lease accounting and Revenue Recognition – guidance, planning and impact on financial ratios and credit markets.

10:10 a.m. – 11:00 a.m.

Title: Get on Board! - An Inside Look at the Fiduciary Role of Nonprofit Board Members

Speaker: Jill Shall, CPA

Field of Study: Specialized Knowledge

Level of Knowledge: Basic

CPE Credit: 1 Hour

Learning Objectives and Program Content: As finance professionals we are often asked to join governing boards of nonprofit organizations. During this session, we will discuss the fiduciary responsibilities of board members and how you can help ensure that the nonprofit organizations you serve remain on the right path.

11:10 a.m. – 12:00 p.m.

Title: Preparing for a Healthier Future

Speaker: George E. Rambow III, CRPS

Field of Study: Specialized Knowledge

Level of Knowledge: Basic

CPE Credit: 1 Hour

Learning Objectives and Program Content: Learn the importance of long term care insurance as part of your personal financial planning.

12:00 p.m. – 12:50 p.m. Networking Luncheon

12:50 p.m. – 1:40 p.m.

Title: Developing Your Leadership Skills
Speaker: Beth Golightly
Field of Study: Professional Development
Level of Knowledge: Basic
CPE Credit: 1 Hour

Learning Objectives and Program Content: Regardless of where you are professionally, it's never too late or early to develop your leadership abilities. With the right approach, you can improve your effectiveness on the job and enhance your career prospects. This presentation provides strategies for inspiring and motivating employees to achieve their potential as well as other skills essential for becoming a successful leader.

1:50 p.m. – 2:40 p.m.

Title: Benefit Plan Audits from both the Employer and Auditor Perspective
Speaker: Karlye Broten, CPA, RPA
Field of Study: Audit
Level of Knowledge: Basic
CPE Credit: 1 Hour

Learning Objectives and Program Content: Protect yourself, your company and your clients by staying current on ERISA compliance issues. This session will cover audit requirement/ key elements, stages in an audit and timeline, and best practices for employers/plan sponsors.

2:40 p.m. – 3:10 p.m. - Refreshment Break

3:10 p.m. – 4:00 p.m.

Title: Accountants Skills Needed for Innovation, Governance and Managing Change
Speaker: Steve Mason, CMA
Field of Study: Business Management & Organization
Level of Knowledge: Basic
CPE Credit: 1 Hour

Learning Objectives and Program Content: Based on IMA Strategic Finance articles for applying accounting skills and governance to innovation and creative problem solving. This session will cover specific skills that we have and how they are employed to support collaborative change management and innovation. Advance Preparation: Read Strategic Finance articles to be emailed prior to event.

4:10 p.m. – 5:00 p.m.

Title: Sales Tax Hot Topics
Speaker: Monika Miles, CPA
Field of Study: Tax
Level of Knowledge: Basic
CPE Credit: 1 Hour

Learning Objectives and Program Content: This session will cover the basics of sales tax and recent updates including click through and economic Nexus; pending US Supreme Court case – what it means for multi-state sellers; marketplace retailers and fulfillment services; and new reporting requirements.

SPEAKER BIOGRAPHIES

Danetha Doe: After building a successful financial consulting business from her laptop, Danetha now leads trainings at CPA firms and universities to share her insights with other accounting professionals. Danetha has spoken at Grant Thornton, Sensiba San Filippo, Financial Executives International, Ohio Society of CPAs Conference, DePauw University, San Jose State University and many others.

Scott Wallace, CPA serves as Principal for Wallace, Plese + Dreher and has over 30 years of experience as a certified public accountant. Scott specializes in litigation support services in Chandler, Scottsdale, Phoenix, and throughout Arizona. Serving as a consultant and expert witness to individuals and Arizona businesses, his experience includes more than 30 matters in state and federal courts. He has also served as an expert witness in the United States Bankruptcy Court for the District of Arizona. As a court-appointed expert, attorneys rely on Scott's extensive knowledge of financial statements and customary business and accounting practices for building legal strategy. Teaming with attorneys, he provides assistance during discovery and preparation for depositions. In matters before the court, he simplistically presents complex financial transactions, audits, budgets, and monetary impacts to the judge and jurors.

Jill Shaw, CPA is a partner with the CPA firm Heinfeld Meech. She currently manages audit services for nonprofits, municipalities, school districts, and other local governments in Arizona. In her role as a partner Jill provides guidance and training on accounting and auditing issues including accounting pronouncements and auditing standards. She is the coordinator of the firm's lunch and learn program which provides ongoing trainings regarding a variety of finance related topics for nonprofits as well as a frequent presenter for the Alliance of Arizona Nonprofits.

George E Rambow III, CRPS is a financial advisor with Edward Jones. Working closely with you, your CPA, attorney and other professionals, we can help determine the most appropriate financial strategy for you and your family. We also help with your retirement savings so you have more options when you retire, regardless of what you decide to do. Originally from Elkhart, IN, George joined Edward Jones as a financial advisor in 2012 opening the firm's fifth branch office in Tempe, AZ. George has a diverse professional background, serving in sales and management positions in the advertising, manufacturing, private capital, and fine arts industries. George attended Indiana University in Bloomington, IN, graduating in 1998 with a bachelor's degree in kinesiology. Active in the community, George is the president of the North Tempe Boys & Girls Club Branch Board of Directors, a member of the Tempe-Kyrene Business Advisory Council, and member of the Mesa Performing Arts Center Board. At Edward Jones, we're focused on you. The firm has thousands of people and advanced technology supporting our office so that we can help you reach your long-term financial goals.

Beth Golightly is a Senior Staffing Executive within the Accountemps - Salaried Professional Service (SPS) representing the east valley of the Phoenix metro area. Salaried Professional Service allows Accountemps to retain highly skilled accounting and finance professionals who are interested in a full-time consulting career – while providing our clients with time- and money-saving staffing solutions.

Karlye Broten, CPA, RPA is currently Manager in the Phoenix Employee Benefit Plan group for CliftonLarsonAllen LLP. She earned her Bachelor's degree in Accounting from The College of St. Scholastica. Karlye earned both her Certified Public Accountant and Retirement Plans Associate credentials.

Stephen C Mason, CMA is Chief Financial Officer for Old World Communities, LLC. Steve earned his Bachelor's Degree in Accounting and Business Management from Arizona State University. Steve is a chief financial manager balanced between financial control/reporting and resourcing business field operations. His leadership style is that of a teacher/mentor who leads from the front always with “hands-on” skills.

Monika Miles, CPA founded Miles Consulting Group in 2002. The firm focuses on multi-state tax consulting. Prior to forming the firm, Monika worked for over 11 years in Big 4 Public Accounting. She graduated from the University of Texas at El Paso with a BBA in Accounting/Finance and has a Masters in Taxation from San Jose State University. Her professional affiliations include AICPA, Vistage, NAWBO-Silicon Valley and the Accounting & Financial Women's Alliance, where she served as National President 2011-2012.

GENERAL INFORMATION

FACILITIES: Sheraton Mesa Hotel at Wrigleyville West is located at 860 N Riverview, Mesa, AZ 85201 next to the Cubs Spring Training Facility at the Mesa Riverview Park area. The seminar sessions will be held in Canyon D with lunch served in Canyon A.

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.nasbaregistry.org.

A CPE Certificate of Completion form is included in your attendee materials. Please complete both copies and have the certificate signed. Return one 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 evaluation 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 unless noted in the session description.

SEMINAR CONTACTS:

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

CHAPTER WEBSITES:

AFWA Mesa East Valley Chapter: mesaeastvalleyafwa.org

IMA AZ Valley of the Sun Chapter: azvots.imanet.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 finance fields to achieve their full potential and to contribute to 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