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

FALL FINANCIAL WORKSHOP
Wednesday October 24, 2018
11:30am-2:00pm
SkySong Center
1301 N Scottsdale Road
Scottsdale, AZ 85257

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 workshop to allow all accounting and financial professionals an opportunity to learn and connect with their peers. Support your profession, stay current on tax and financial planning strategies, and make a small investment in your career by joining the members of the AFWA and IMA for our Fall Financial Workshop.

WORKSHOP SCHEDULE

11:30 a.m. – 12:00 p.m. Registration & Boxed Lunch

12:00 p.m. – 2:00 p.m.

Title: Advanced Tax & Financial Planning Strategies - Tips for Reducing Sizable Income Tax Liability for Business Owners and High Net Worth Clients
Speaker: Kelly Woo, CFP & Theresa Valade, CPA
Field of Study: Taxes
Level of Knowledge: Intermediate
Prerequisite: Basic Knowledge of Business and Individual Taxation
Instructional Delivery Method: Group Live
CPE Credit: 2 Hours
Learning Objectives and Program Content:

The 2017 filing season is now behind us and there are is less than 90 days left in 2018. The last thing businesses and High Net Worth individuals want to think about is taxes, BUT now is the time. 2018 will be a different year for many due to Trump tax reform. Now is the time to understand how these tax changes will affect you and your clients' bottom line.

Will you pay more in taxes?
Where can you save money?
What can you do between now and the end of the year to save on taxes?

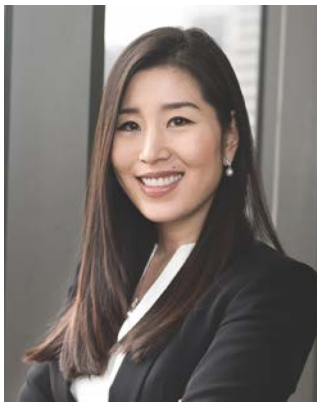
These are critical questions to ask. Tax and financial planning are critical tools businesses and individuals need to take advantage of as 2018 ends.

Join us for a discussion on tax reform, advanced tax and financial planning strategies for business owners to offset taxable income for 2018. We'll delve into various strategies that may zero-out taxable income or even qualify for IRS refunds.

We will also share investment options that are allowed inside advanced pension plans to deduct contributions, defer taxes on earnings and possibly withdraw without paying income taxes.

After this session, attendees will know what options are available to clients to reduce 2018 taxes and what steps to take before year end to take advantage of these options.

SPEAKER BIOGRAPHIES



Kelly Woo, CFP
Co-Founder and Principal of Profectus Financial & Insurance Services
Co-Founder and Principal of Profectus Wealth Management
www.profectusfinancial.com

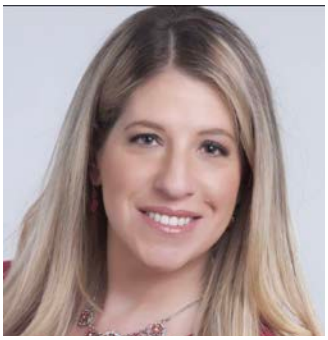
Kelly Woo is a Co-Founder and Principal at Profectus Financial. She has been in the financial services industry since 2006 and has been successful at consulting both business and individual clients with their retirement, investment and tax saving strategies.

Over the span of her career, Kelly has earned top marks in the financial world. She started her career as an award-winning personal loan consultant for Countrywide Financial and then to New York Life as one of the top financial services professionals with the company. Before co-founding Profectus Financial, she was a principle partner at RGL Group Financial, where she established her career in working with successful business owners, helping them to develop tax efficient pension plans. She has been a member of the Million Dollar Round Table association since her career as a financial services professional began and currently holds a TOP of the Table MDRT membership, which is the highest ranking in the association. She is also a CERTIFIED FINANCIAL PLANNER™. As a CFP®, Kelly has remained committed to growing her knowledge of advanced financial markets, staying ahead of the changing trends and regulations, and always striving to improve, learn and grow for the benefit of her clients. Recognizing that financial planning is complex, Kelly has developed strategic partnerships with other professionals such as attorneys, CPAs, and risk management advisors to provide the most holistic solution for her clients.

In addition to her many certificates and recognition, Kelly was featured in the March/April 2017 issue of MDRT magazine for her outstanding success in financial services. In the article, MDRT recounts Kelly's unique path from a loan officer to CFP, her journey through entrepreneurship, and her substantial command in advanced planning that earned her years of membership status with MDRT and Top of the Table. You can read Kelly's MDRT article at www.mdrt.org.

Kelly graduated from the University of California, San Diego in 2004 with a Bachelor of Arts in Communications. She currently holds over seven different financial licenses and designations. She speaks fluent English and Korean.

Theresa Valade, CPA
Founder of Concierge Consulting & Accounting PLLC



Theresa founded Concierge Consulting & Accounting, PLLC in 2018 under the vision to do accounting different. Theresa wanted to build a company where her clients more than just a once a year relationship. She strives to be a trusted advisor and with that vision Concierge Consulting and Accounting, PLLC was born.

Theresa has a passion for assisting her clients in all aspects of their businesses. She is an advocate of long-lasting business relationships versus once a year engagement. She takes a very personal approach to all her clients and focuses on the following core principles: people, products and services, processes, policies, and procedures. She dissects all aspects of her client's business to get them to operate at their maximum potential for success and longevity.

She is a trusted advisor for her clients in income taxes and believes in income tax education, planning and accurate return preparation and presentation. She is skilled in tax planning and income tax strategies. She has hundreds of small and medium sized companies and individual clients that she assists with income tax preparation, planning, business consulting and bookkeeping services.

One of her favorite parts of her job is representing clients in income tax audits. From assisting clients with IRS notices to working as the power of attorney on behalf of the taxpayer on audits lasting months or more, Theresa is happy to work with, educate and comfort the client throughout these processes. She uses these experiences as a training tool for her clients while she gains valuable insight into the operations, insight and thinking of the IRS.

Theresa has a passion for public speaking and has been a guest speaker at numerous professional and national organizations. Most recently she was featured on Dash Radio in Los Angeles, California, and was a guest on the Eliances Heroes of Business Radio Show. Her speaking engagements have covered a wide array of items including: the importance of internal controls, fraud prevention, nonprofit regulations, tax regulations and tax planning, tax reform, the ABC's of understanding the financial statements, and many more items.

Theresa has over 25 years of experience in tax, audit and consulting. She most recently was a partner with Moffitt & Company, P.C. Her areas of specialization were nonprofits, real estate, hospitality, franchises, mortgage banking and brokering, title insurance, escrow and franchises. She was the audit partner responsible for over 20 certified audits and represented two of the largest not-for-profits in the State of Arizona. Theresa has worked with public and private clients. She has assisted and worked on offering memorandums, 10K's and 10Q's. Her clientele is national and world-wide.

After graduating from college, Theresa was hired at the International CPA firm, Arthur Andersen, LLP in the Business Process Risk Consulting and external audit divisions. She was based out of the San Francisco and Phoenix offices where she specialized in internal controls and fraud awareness. Theresa was the in-charge auditor on a multi-billion-dollar healthcare engagement and was responsible for implementing "risk-based auditing" at 56 hospitals throughout the Western United States. She also taught monthly Internal Controls and Fraud Awareness classes.

Theresa is a member of the following professional organizations: American Institute of Certified Public Accountants, Arizona Society of Certified Public Accountants, Accounting and Finance Women's' Alliance, and Treasurer of the Scottsdale Alliance Network Group.

GENERAL INFORMATION

LOCATION: SkySong Center 1301 N Scottsdale Rd, Scottsdale, AZ 85257

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 workshop. 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.

WORKSHOP 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

Fall Financial Workshop Registration

Wednesday October 24, 2018
Registration Form

AFWA/IMA Member Registration	$30
Nonmember Registration	$35

Registration Deadline: October 21, 2018

Name	Company
Address	Title
	Email
	Phone

Select Box Lunch Option:

_____Bacon Turkey Bravo Sandwich
_____ Mediterranean Veggie Sandwich
_____ Fuji Apple Chicken Salad
_____ Asian Sesame Chicken Salad

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 Programs Director, Laura Mangan at chapter@mesaeastvalleyafwa.org or call 480-276-5926.

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