

# 2007 Small Firm Networking Group Meeting Agenda

November 9-11, 2016 | Albuquerque, NM

Wednesday, November 9

Location: Sage

Time	Location	
1:00 – 1:15	<b>Welcome</b>	John Graham, Chair
1:15 – 3:00	<b>“Confession/Repentance” –Mistakes made, consequences and prevention/detection measures taken</b>	Roger Nagel/All
3:00 – 3:15	<b>Break</b>	
3:30 – 4:30	<b>Retirement issues roundtable</b>	John Graham/All
5:00 – 6:30	<b>Reception</b> Location: HQue ( <i>in hotel</i> )	

Thursday, November 10

Location: Sage

Time	Session	Speaker/Facilitator
8:00 – 8:30	Breakfast ( <i>Location: in meeting room</i> )	
8:30 – 8:45	Welcome	John Graham, chair
8:45 – 10:00	<b>Firm Updates</b>	All
10:00 – 10:15	Break	
10:15 – 12:00	<b>Firm Updates (continued)</b>	All
12:00 – 1:00	Lunch ( <i>Location: HQue</i> )	
1:00 – 2:00	<b>Moving to the Cloud</b>	Casey Lynch
2:00 – 3:00	<b>International Tax 101</b>	Sam Kittle/John Graham
3:00 – 3:15	Break	
3:15 – 3:45	<b>Year-end Planning with your “A” Clients</b>	John Graham
3:45 – 5:00	<b>“Lovin on Em” – What’s working for us, what’s not, testimonies on extraordinary actions for clients and staff retention.</b>	Roger Nagel/All
5:00	Meeting Day 1 Adjourns	
6:00	Group Dinner ( <i>Location: Albuquerque International Balloon Museum</i> )	Bus will leave from hotel at 5:45

Over >

**Friday, November 11**

**Location: Sage**

<b>Time</b>	<b>Session</b>
8:00 – 8:30	Breakfast ( <i>Location: in meeting room</i> )
8:30 – 9:30	<b>Upcoming Tax/Audit Season – Tax Law and Other Changes</b> <b>David Potts/All</b>
9:30 – 10:00	<b>PCPS Website Resources</b> <b>Lisa Simpson, PCPS</b>
10:00 – 10:15	Break
10:15 – 11:00	<b>New Niche Services – Providing Accounting Support to Small Businesses and Nontraditional Customers</b> <b>Jeff Fitch/All</b>
11:00 – 12:00	<b>Using the Manufacturing Deduction to Obtain New Clients</b> <b>Steve Bankler</b>
12:00 – 1:00	Lunch ( <i>Location: in meeting room</i> )
1:00 – 1:35	<b>IRS Software – Easily accessing client records</b> <b>Casey Lynch/Ted Fricke</b>
1:35 – 2:05	<b>Member Help Session-bring a problem and leave with a solution</b> <b>All</b>
2:05 – 3:00	<b>Parking Lot Items</b> <b>John Graham, chair</b>
3:00 – 4:00	<b>Housekeeping</b> <b>John Graham, chair</b> ( <i>discuss future meeting dates/locations/agenda items</i> )
4:00	Meeting Adjourns



<https://Twitter.com/AICPA>

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