



2002 Small Firm Networking Group

Meeting Agenda

June 18-19, 2009

The Allerton Hotel – Chicago

***Wednesday, June 17, 2009:**

Cocktails & Appetizers Networking Reception. 6 - 8 p.m. in M Avenue Restaurant located in the Allerton Hotel.

Day 1 - Thursday, June 18, 2009 (Meeting Room: Olmsted 4th Floor)

<i>Time</i>	<i>Session</i>	<i>Speaker(s)</i>
8:00 – 8:30	Hot Breakfast	
8:30 – 8:45	Welcome & Agenda Review	Mike Shost, <i>Group Chair</i>
8:45 – 10:00	Self Introductions - <i>Name</i> - <i>Firm</i> - <i>Location</i> - <i>Number of FTEs</i> - <i>Highs & Lows of Tax Season</i>	Mike Shost, <i>Group Chair and each participant</i>
10:00 – 10:15	Break	
10:15 a.m. – 12:15 p.m.	Practice Management KPIs - <i>Management by Numbers</i> - <i>Accounting Practice Term Definitions</i> - <i>Realization (fees per staff, owner, etc)</i> - <i>Chargeability % (staff & owners)</i> - <i>Write-downs Analysis</i> - <i>Theories, discussion using members' stats</i>	Bill Pirolli, <i>Partner, DiSanto, Priest & Co.</i>
12:15 – 1:15	Lunch	Location: Mies van der Rohe - 4 th Floor
1:15 – 2:15	Sikich Firm Merger	Curt Kleckler, <i>Group Member</i>
2:15 – 3:00	Firm Spotlight	Harold Rothman, <i>Group Member</i>
3:00 – 3:15	Break	
3:15 – 4:00	Revised Peer Review Standards Discussion	Craig Gegorek and John Pittman, <i>Group Members</i> & Mitch Ligotino, <i>AICPA Project Manger</i>
4:00 – 5:00	Document Retention	Jim Marty & Tom Kosler, <i>Group Members</i>

Dinner

<i>Time</i>	<i>Location</i>	<i>Comments</i>
6:30	Brazzaz Brazilian Steakhouse 539 N. Dearborn Ave. Chicago, IL 60610 (312-564-5006)	Meet in hotel lobby at 6 pm. Walk or cab to restaurant.

- Over -

Day 2 - Friday, June 19, 2009 (Meeting Room: Olmsted 4th Floor)

<i>Time</i>	<i>Topic</i>	<i>Speaker(s)</i>
8:30 – 9:00	Hot Breakfast	
9:00 – 9:30	Future Meetings – Locations, Dates & Topics	Mitch Ligotino, <i>AICPA Project Manager</i>
9:30 – 11:30 (Break: 10:30 – 10:45)	Best Practices Breakout Sessions (& Break) Discussion Topics: - <i>IRS Audits & Collection Activity</i> - <i>Succession</i> - <i>Staffing</i> - <i>A&A/The Current Economic Conditions</i>	Facilitated by: TBD at meeting
11:30 a.m. – 12:00 p.m.	Best Practices Summary & Tips	Group A Group 1
	Group Wrap-up	Mike Shost, <i>Group Chair</i>

Notes/Announcements:

- **We'll need a spokesperson from each breakout session group to recap your sessions for the whole group when we reconvene at 11:30.**