

Large Firm Networking Group Meeting

May 5-6, 2011 ♦ New York

AGENDA

Thursday, May 5

8:00 am	Breakfast	Meeting Room
8:30 am	Introductions – Member Updates, Tax Season Debrief	Mark Walker (Chair)/All
9:45 am	Break	
10:00 am	Digital Best Practices – Key IT topics for your tax, audit, client service and administrative departments	Roman Kepczyk - Xcentric
Noon	Lunch	Dining Room
1:00 pm	Group Discussion: <ul style="list-style-type: none"> • Your Firm’s marketing strategy and sharing of ideas • Pricing of compliance work in a hyper competitive environment • Client acceptance issues • CRM software in your business 	Steve Handrick - Moderator
2:00 pm	Break	
2:15 pm	Group Discussion: <ul style="list-style-type: none"> • Continuation of marketing discussion 	Steve Handrick - Moderator
3:00 pm	AICPA Update	Barry Melancon
5:00 pm	Day 1 of Meeting Adjourns	
7:00 pm	Dinner: Tao Asian Bistro 42 E. 58 th St. (Between Park & Madison Avenues) New York, NY 10022 212-888-2288	

Friday, May 6

8:00 am	Breakfast	Meeting Room
8:30 am	M&A - Key Elements to a Successful Merger	Joel Sinkin - Accounting Transition Advisors
10:00 am	Break	
10:15 am	Financials Survey Discussion	All
Noon	Lunch	Dining Room
1:00 pm	Meeting Adjourns	