

Medium II Firm Networking Group Meeting Agenda

November 4 & 5, 2016 | Madison WI

Thursday, November 3, 2016

6:30 – 8:30 PM	Cocktail Reception - Sponsored by Ernst & Morris (Dave Okun-Ernst & Morris Representative)	LOCATION: KMA Bodilly Offices Bus from hotel at 6pm Bus back to hotel at 8:30pm
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Friday, November 4, 2016

Location: Meeting Place I

8:00 – 8:30	Breakfast	
8:30 – 10:00	Lean Six Sigma	Michael Wherry Boomer Consulting
10:00 – 10:15	Break	
10:15 – 12:00	Lean Six Sigma	Michael Wherry Boomer Consulting
12:00 – 1:00	Lunch (Location: Meeting Place II)	
1:00 – 3:00	Round Table Follow up Discussion on Lean Six Sigma Presentation	Sue McCormick
3:00 – 3:15	Break	
3:15 – 4:30	Sure Prep's Tax Document Automation & Full Preparation Services Overview	Octavian Tomos
4:30 - 5:00	Housekeeping, Next Meeting Date, Location, Topics	

Saturday, November 5, 2016

Location: Meeting Place I

8:00 – 8:30	Breakfast	
8:30 – 10:00	Wolters Kluwer presentation on CCH Axxess™	Keegan Denton, Dave Shalit, Jeff Schrantz, and Nate Brown
10:00 – 10:15	Break	
10:15 – 12:00	Round Table Solving Partner's Top Firm Issues	Sue McCormick
12:00 – 1:00	Lunch	
1:00 – 4:00	Round Table: Solving Partner's Top Firm Issues	Sue McCormick

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Saturday, November 5, 2016 (continued)

4:00 – 4:30 **Wrap Up/Meeting Day 2 Adjourns**

6:30 **Group Dinner**
Location: [Eno Vino](#)
601 Junction Rd.

**Bus will pick up from hotel at
6:15 (Bus back will leave at
8:15)**

Sunday, November 6, 2016

9:00 AM **Meet in hotel lobby for day of fun!**

**Recommended and organized
by Jason Kadow**