

2007 Small Firm Networking Group Meeting Agenda

All Small Firm Groups Joint Meeting – November 9-11, 2011 – San Diego, CA

Hilton San Diego Gaslamp Quarter

Day 1: Wednesday, November 9, 2011

<i>Time</i>	<i>Room</i>	<i>Session / Location</i>	<i>Speaker(s)</i>
11:30 – 12:30	Terrace Center	Meet & Greet Lunch - joint	
12:30 – 1:00	Santa Rosa	Welcome – joint	Heidi Brundage, <i>Senior Technical Manager - PCPS</i>
1:00 – 2:30	Santa Rosa	Small Firm Update – joint	Jim Metzler, <i>AICPA VP - Small Firm Interest</i> ; Natasha Schamberger, <i>AICPA Senior Technical Manager - Small Firm Interests</i>
2:30 – 3:30	Santa Rosa	CPA Horizons 2025	Jim Metzler
3:30 – 3:45	Terrace Foyer	Break	
3:45 – 5:15	Marina A Marina B Pacific	Joint Breakout Sessions: 1. Staffing 2. Technology 3. Time Management and Delegation	

Dinner (By individual group)

<i>Time</i>	<i>Location</i>	<i>Comments</i>
6:30 pm	Osetra (619) 239-1800 904 5th Avenue San Diego, CA 92101	Meet in lobby at 6:15 pm

Day 2: Thursday, November 10, 2011

<i>Time</i>	<i>Room</i>	<i>Session</i>	<i>Speaker(s)</i>
8:00 – 8:30	Terrace Foyer	Breakfast – joint	
8:30 – 10:00	Santa Rosa	Succession Workshop for the Small Firm – joint	Joel Sinkin, <i>Accounting Transition Advisors</i>
10:00 – 10:15	Terrace Foyer	Break	
10:15 – 12:15	Santa Rosa	Succession Workshop for the Small Firm cont'd – joint	Joel Sinkin
12:15 – 1:15	Terrace Center	*Lunch	
1:15 – 1:45	Marina A	*Member Recap – Update on Past Six Months; Tax Season Prep Discussions	All
1:45 – 3:00	Marina A	*Marketing – Networking / Selling Expansions / New Lines of Business	Facilitated by Group Chair, Dave Nagy

3:00 – 3:15	Terrace Foyer	*Break	
3:15 – 4:45	Marina A	*The Blitz – Firm Management Topics / Best Practices	Facilitated by Ted Fricke
4:45 – 5:15	Marina A	*Firm Spotlight	Presenter: Phil Strosahl

Dinner (Joint)

<i>Time</i>	<i>Location</i>	<i>Comments</i>
6:30 pm	Chianti Restaurant (619) 235-8144 644 5th Avenue Gaslamp Quarter Downtown San Diego, CA 92101	Meet in lobby at 6:15 pm

Day 3: Friday, November 11, 2011

<i>Time</i>	<i>Room</i>	<i>Topic</i>	<i>Speaker(s)</i>
8:00 – 8:30	Terrace Foyer	Breakfast	
8:30 – 10:00	Marina A	*Small Town Hall	Jim Metzler
10:00 – 10:15	Terrace Foyer	*Break	
10:15 – 11:30	Marina A	*Flex Roundtable – Blitz Tabled Topics Revisited	Facilitator TBD
11:30 – 12:00	Marina A	*Future Meetings – Locations, Dates & Topics	Facilitated by Group Chair, Dave Nagy

**Times for these sessions will vary among the three groups.*