

CPA Firm Technology Symposium Solutions to Keep You Current and Competitive Course Description

This symposium is an exciting and informative overview of technology solutions for CPA firms. Leading vendors in the CPA technology industry will be moderated by professional speakers with over 25 years of experience. In a non sales-oriented environment, this is your chance to hear about and see the latest solutions and strategies to be competitive and thrive. Even if you are happy with your current solution, you will be surprised at how new features in other products or automation of new areas can help you run your firm more profitably. Improve client retention and satisfaction. You will take away ideas that you can apply in your firm immediately as well as ideas to help you plan for the future.

The course will provide an overview of the key CPA firm technologies available as well as some futuristic insights. Solution providers will discuss their products in moderated 20-40 minute segments to keep the content moving rapidly and accurately. Examples of vendors and products represented will include: CCH, Thomson Tax & Accounting, Intuit, Acct1st, Doc-It, CaseWare, Drake, SurePrep, XCM, CYMA, Capital Confirmation, TaxWorks, Office Tools Pro, SageWorks, Sage, ADP, and Avalara. With the open forum discussion style of presentation, you will also learn what your peers are saying about different solutions for your firm.

For details please visit:
www.k2e.com/cpa

Course Highlights

- ◆ End user survey and live discussion about solutions
- ◆ Online course support at www.cpafirmtech.com
- ◆ CPA firm hardware from notebooks, desktops, servers, to PDAs, and more
- ◆ Latest trends and solutions to improve performance and productivity
- ◆ Security for CPA firms from A-Z including notebooks in the field
- ◆ Document storage, document management, and the difference. It really does matter!
- ◆ Software solutions and recommendations in all categories. Practice management, tax, audit, estate planning, write-up, payroll, financial reporting & analysis, fixed assets, and much, much more
- ◆ Live demonstrations of key industry applications by knowledgeable presenters from top companies in the CPA technology industry

Course Information

- ◆ **CPE credit:** Recommended for 8 hours Business Management and Organization
- ◆ **Instructional delivery method:** Group-live demo and discussion using color computer projection - NOT a hands-on course
- ◆ **Prerequisites:** None
- ◆ **Program level:** Intermediate
- ◆ **Advance preparation:** None
- ◆ **Designed for:** Accountants in public practice
- ◆ **Who should attend:** Any accountant in public practice. Especially managing partners and technology managers in accounting firms.