Training Guide for Accounting Professionals

Tracks for Accounting Professionals

- QuickBooks Desktop Deep Dive (Pre-Event)
- QuickBooks ProAdvisor Certification Exam Preparation
- Practice Growth and Development
- In-Depth Training on QuickBooks Online
- In-Depth Training on Intuit Professional Tax Solutions
- Presentations by Industry Thought Leaders

Monday, October 20th

Pre-Event: QuickBooks Desktop Deep Dive

QuickBooks ProAdvisor Certification exam preparation

(Monday All Day + Tuesday Morning)

This extensive, multi-session course begins at 8:00 AM on Monday morning, October 20th and ends at 11:40 AM on Tuesday, October 21. The course is designed to prepare you to take the QuickBooks ProAdvisor Certification Exam as well as to equip you to support your clients who use QuickBooks desktop. The subject matter is broad...and comprehensive, covering the fundamentals of QuickBooks, the new features of QuickBooks, and the unique features available in QuickBooks Accountant.

Topics and QuickBooks features addressed during this multi-session course include:

Choosing the right QuickBooks solution for your clients	Understanding QuickBooks terminology	Understanding QuickBooks payroll options and the best fit for your clients	Working with the Chart of Accounts
Working with Items	Setting up a new QuickBooks File and entering opening balances	Working with QuickBooks lists	Customizing QuickBooks user and company-level preferences
Managing sales and receivables	Sales tax fundamentals	Managing purchases and disbursements	QuickBooks banking and bank reconciliation
Job Costing	Setting up and using QuickBooks payroll	Customizing and organizing reports, reporting by class and using special reports for accounting professionals	Integrating QuickBooks with Microsoft Word and Excel
Using Client Data Review	Using Batch Enter Transactions	Managing Year End Tasks	Working with QuickBooks Year End Reports

Instructor: MB Raimondi, CPA.CITP
Prerequisites: A basic level knowledge of QuickBooks Pro
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 13.5 Credits
Field of Study: Specialized Knowledge and Applications

Note: All accounting professionals are eligible to take this course, but only members of the ProAdvisor Program are eligible to take the associated certification exam.

Note: This course is designed to prepare attendees to pass the QuickBooks ProAdvisor Certification Exam, but participation in this course does not guarantee the attendee will pass the exam.

Note: This course does not include testing. Attendees can access the QuickBooks ProAdvisor Certification Exam in the online ProAdvisor certification center.

Monday, October 20th

Pre-Event: QuickBooks Desktop Deep Dive

Advanced QuickBooks ProAdvisor Certification exam preparation

(Monday All Day)

This highly advanced, multi-session course prepares ProAdvisors to take the Advanced ProAdvisor Certification Exam.

Topics and QuickBooks features addressed during this multi-session course include:

Managing QuickBooks versions and editions	Understanding and working with various QuickBooks file types	Starting clients over with new QuickBooks files	Using QuickBooks data file management utilities
Inputting summary sales receipts (e.g., for retail clients)	Inputting payroll transactions processed through third party payroll services	Managing client retainers	Managing barter transactions
Best practices for entering journal entries in QuickBooks	Advanced job costing processes	Troubleshooting QuickBooks lists	Troubleshooting the Undeposited Funds account
Troubleshooting inaccurate or incomplete data file setup	Troubleshooting inventory and cost of goods sold	Troubleshooting sales tax	Troubleshooting bank reconciliations
Troubleshooting inconsistencies in beginning balances	Making the most of the QuickBooks audit trail report	Troubleshooting accounts receivable and accounts payable issues on the Balance Sheet	Advanced report customization

Instructor: Dawn Brolin, CPA
Prerequisites: A solid understanding of the fundamentals of QuickBooks desktop
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 9.5 Credits
Field of Study: Specialized Knowledge and Applications

Note: All accounting professionals are eligible to take this course, but only members of the ProAdvisor Program with certification in the three most recent versions of QuickBooks desktop are eligible to take the associated certification exam.

Note: This course is designed to prepare attendees to pass the Advanced QuickBooks ProAdvisor Certification Exam, but participation in this course does not guarantee the attendee will pass the exam.

Note: This course does not include testing. Attendees can access the Advanced QuickBooks ProAdvisor Certification Exam in the online ProAdvisor certification center.

Monday, October 20th

Pre-Event: QuickBooks Desktop Deep Dive

Making the most of the QuickBooks/Excel integration (8:00-9:40 AM)

This course teaches you how to leverage the built-in QuickBooks/Excel Integration to access QuickBooks data for analytics and other advanced reporting options.

In this in-depth technical training course you will learn how to:

- Export common QuickBooks reports to Excel with various preference settings
- Use enhanced export options to create refreshable Excel spreadsheets
- Import report data into Excel using the QuickBooks ODBC driver
- Use advanced report options in Excel to perform analysis services for your clients

Instructor: Mario Nowogrodzki, CPA.CITP
Prerequisites: A basic level understanding of QuickBooks reports and Microsoft Excel
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

QuickBooks for contractors (8:00-9:40 AM)

In this course, learn how to use QuickBooks for your contractor clients. Topics covered include proper industry-specific setup, best ways to enter transactions, and how to quickly get the job reports your clients need, while still preserving the basic financials you need at year end.

In this in-depth technical training course you will learn how to:

- Set up QuickBooks for your contractor clients
- Process common transactions for your contractor clients
- Use QuickBooks Online for your contractor clients
- Track Retainage, WIP, committed costs, and costs to complete
- Create job cost reports and other advanced reporting specific to the construction industry

Instructor: Gregg Bossen, CPA
Prerequisites: An Understanding of the Fundamental Use of QuickBooks Desktop
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Monday, October 20th

Pre-Event: QuickBooks Desktop Deep Dive

Mastering QuickBooks in-product reports (10:00-11:40 AM)

QuickBooks provides a wide range of formatting and customization options around the default, in-product reports. Many features go undiscovered until you really dig deep into the software and combine multiple report filter and display options. Learn how to more efficiently create, use, and customize the wide range of reports available in QuickBooks.

In this in-depth technical training course you will learn how to:

- Customize the standard reports in QuickBooks using various filters and display settings
- Avoid common report customization mistakes, misinterpretations and assumptions
- Best practices for memorizing and organizing custom reports
- Share report templates and download reports created by other QuickBooks users

Instructor: Gale Kirsopp
Prerequisites: A basic level understanding of QuickBooks reports
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

QuickBooks for non-profits (10:00-11:40 AM)

We'll show you the best methods for tracking and reporting the unique activities of non-profit organizations such as 501(c)(3) charities, membership associations, schools and churches. You'll also learn how to properly set up the books and enter common transactions for a typical non-profit, as well as how to fulfill internal and external reporting requirements.

In this in-depth technical training course you will learn:

- Best practices for setting up QuickBooks for non-profit organizations
- How to track programs and funds
- How to track restricted grants
- How to meet the special reporting requirements of non-profit organizations
- How to enter QuickBooks-friendly year end adjustments for non-profit organizations

Instructor: Gregg Bossen, CPA
Prerequisites: An Understanding of the Fundamental Use of QuickBooks Desktop
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Monday, October 20th

Pre-Event: QuickBooks Desktop Deep Dive

QuickBooks at year-end (12:00-1:40 PM)

This course focuses on QuickBooks Premier Accountant, which is designed to make the often tedious year-end processes easier to manage. The software includes tools that streamline the preparation of adjusting journal entries, allow you to work in your client's QuickBooks files remotely, and enable you to work directly with your client on year-end accounting processes & financial reporting.

After attending this in-depth technical course you will be able to:

- Streamline year end processes for your clients who use QuickBooks
- Provide more timely and detailed financial reporting to your clients at year end…and throughout the year as well
- Increase lines of communication between you and your clients regarding their financial position and performance

Instructor: Karen Siewert
Prerequisites: An Understanding of the Fundamental Use of QuickBooks Desktop
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Mastering QuickBooks inventory in Pro and Premier (12:00-1:40 PM)

Learn the features and functionality of QuickBooks inventory in Pro and Premier, and best practices for setting up inventory and processing transactions.

In this in-depth technical training course you will learn how to:

- Set up QuickBooks Inventory Items
- Work with Purchase Orders and Item Receipts
- Use unit of measure conversions
- Learn best practices for tracking inventory with clients who need job cost reports
- Understand QuickBooks average cost valuation
- Troubleshoot inventory – detect & correct common errors
- Understand Inventory Adjustments and enter adjustments for your clients
- Work with QuickBooks inventory reports

Instructor: Ilene Eisen, CPA.CITP
Prerequisites: An Understanding of the Fundamental Use of QuickBooks Desktop
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Monday, October 20th

Pre-Event: QuickBooks Desktop Deep Dive

Mastering inventory in QuickBooks Enterprise Solutions (2:00-3:40 PM)

This course covers inventory management specific to QuickBooks Enterprise Solutions including the add-on application called Advanced Inventory. The course provides best practices for setting up inventory and processing transactions using Enterprise Solutions and Advanced Inventory

This course covers the following topics:

- Multi-Location Tracking
- Lot Tracking
- Enhanced Inventory Receiving
- Variable Bills of Materials
- Serial Number Tracking
- FIFO Inventory Valuation
- Shipping Manager
- Inventory Reports unique to QB Enterprise Solutions & Advanced Inventory

Instructor: Mario Nowogrodzki, CPA.CITP
Prerequisites: An Understanding of QuickBooks Inventory Tracking in Pro and Premier
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

QuickBooks at tax time (2:00-3:40 PM)

Your clients' QuickBooks data is seldom clean enough or complete enough for you to use when preparing your clients' income tax returns. This session covers the top 10 mistakes clients make in QuickBooks and how to quickly correct those mistakes, allowing you to confidently use the QuickBooks trial balance to prepare your clients' returns. You will also learn proactive steps you can take with your clients to keep their data accurate throughout the year – to streamline both income tax return preparation and periodic financial statement preparation.

After attending this in-depth QuickBooks session you will be able to:

- Increase efficiency when preparing income tax returns for clients who use QuickBooks
- Train your clients to prepare their files for the income tax return
- Have more confidence in the numbers you use to prepare your clients' returns

Instructor: Gregg Bossen, CPA
Prerequisites: None
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Monday, October 20th

Pre-Event: QuickBooks Desktop Deep Dive

Top 10 QuickBooks tips and tricks (4:00-5:30 PM)

Every year, Intuit infuses QuickBooks with a wide range of new features. However, it is not realistic to expect Intuit to meet 100% of your clients' business-specific and industry-specific needs with each new version. So...as QuickBooks consultants you have to think creatively - to provide your clients with tips, tricks and custom processes. This in-depth technical presentation covers essential QuickBooks Tips, Tricks and Custom Processes to help you stretch QuickBooks to meet your client's business-specific needs.

After attending this in-depth technical course you will be able to:

- Solve many of your clients' unique business-specific and industry-specific accounting needs
- Streamline your clients' workflow
- Delay or prevent the need for your clients to use third party solutions
- Empower your clients to more effectively manage their businesses using QuickBooks

Instructor: Joe Woodard
Prerequisites: An Understanding of the Fundamental Use of QuickBooks Desktop
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 1.5 Credits
Field of Study: Specialized Knowledge and Applications

Mastering Lacerte: Top time saving features & what's new
(4:00-5:30 PM)

For experienced Lacerte users, this course teaches you how to put the power of Lacerte to work for you beyond the basics. Spend 90 minutes with the Lacerte Product Manager learning the in's & out's of Lacerte's most popular time savings features and the tips & tricks hand picked from some of Intuit's longest term Lacerte customers. Plus get a preview from Intuit on what's coming down the pipeline for Tax Year 2014.

Attend this exciting course on Lacerte tax preparation software to:

- Gain confidence on how to use some of Lacerte's more advanced features
- Understand what's coming for TY14 ad how the new features will benefit your practice
- Have an opportunity to ask your own questions to the Lacerte Product Manager

Instructor: Mary Kroenung, Product Manager, Lacerte
Prerequisites: An Understanding of the Fundamental Use of Lacerte Tax Preparation Software
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 1.5 Credits
Field of Study: Specialized Knowledge and Applications

Tuesday, October 21st

Pre-Event: QuickBooks Desktop Deep Dive

QuickBooks data file management: Increasing performance and file stability (8:00-9:40 AM)

Learn some of the behind-the-scenes of QuickBooks data files, the ins and outs of file size considerations, tricks on how to speed up QuickBooks, how certain uses of QuickBooks affect performance, and best practices for troubleshooting problem files.

After attending this in-depth technical course you will be able to:

- Increase file performance for large QuickBooks files and files with multiple QuickBooks users
- Troubleshoot common data integrity and stability issues

Instructor: Mario Nowogrodzki, CPA.CITP
Prerequisites: An Understanding of the Fundamental Use of QuickBooks Desktop
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

What's new in QuickBooks 2015 (8:00-9:40 AM)

This course covers the new features in QuickBooks 2015 Pro and Premier as well as Premier Accountant 2015.

This course equips you to better support your clients who use QuickBooks 2015, and gives you the critical information you need to advise your clients about upgrading from older versions of QuickBooks.

After attending this course, you will be able to:

- Understand the new and improved features in QuickBooks 2015
- Identify new features that will help you work more efficiently with your clients
- Evaluate and recommend the right QuickBooks product to your clients

Instructor: Joe Woodard
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Tuesday, October 21st

Pre-Event: QuickBooks Desktop Deep Dive

Converting QuickBooks to QuickBooks Online (10:00-11:40 AM)

QuickBooks Online includes powerful conversion tools, especially for clients who are migrating from QuickBooks Desktop. However, as trusted advisors and accounting professionals, it is best for you to guide your clients through the conversion process to ensure the client is converting accurate, current accounting data to QuickBooks Online. This session gives you tips and best practices for converting to QuickBooks Online.

After attending this course you will be able to:

- Assist your clients with the conversion from QuickBooks Desktop to QuickBooks Online
- Understand options for converting from accounting solutions other than QuickBooks
- Validate your clients' post-conversion data in QuickBooks Online to verify that the converted accounting transactions are complete and accurate.

Instructors: Joe Woodard and Woody Adams
Prerequisites: An Understanding of the Fundamental Use of QuickBooks and QuickBooks Online
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Consulting strategies for the Intuit-centric accounting professional (10:00-11:40 AM)

Many accounting professionals look at their client's QuickBooks data only within the context of tax preparation and year end accounting services. Others, like Robin Hall, have taken a step farther down the path, embracing proactive QuickBooks consulting as a year-round revenue stream. Join Robin for this game changing practice development session that will challenge you to be more proactive with your clients who use QuickBooks.

In this practice development course you will learn:

- The unique challenges and opportunities around supporting QuickBooks software
- Proven strategies for small business software implementation and deployment
- How to leverage Intuit's ecosystem of integrated solutions to expand the services you offer your clients
- How to use QuickBooks consulting as a "top of funnel" strategy to grow your practice

Instructor: Robin Hall
Prerequisites: None
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Tuesday, October 21st

Pre-Event: QuickBooks Desktop Deep Dive

Transitioning to a client-centric practice (10:00-11:40 AM)

To become trusted advisors, accounting practices must focus primarily on generating client success. This primary goal should influence both the culture of accounting firms and every interaction accountants have with their clients.

Attend this high impact practice development session to:

- Develop a firm-wide mindset focused on client success.
- Discover the key obstructions to client success and how you as a trusted advisor can guide your clients through common but difficult growth and business development barriers.
- Infuse your client engagements with forward-looking performance indicators and business measurements that empower you to steer your clients, rather than simply measure your clients' past activities.

Instructor: Edi Osborne
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

QuickBooks Desktop Pre-Event Ends

Note: The QuickBooks Desktop Deep Dive Pre-Event ends at 11:40 on Tuesday morning. All sessions from Noon on Tuesday through Noon on Thursday are part of QuickBooks Connect and do not require a separate registration.

Note: We will provide lunch for the registrants of the QuickBooks Desktop Deep Dive Pre-Event so you can attend the sessions beginning at noon without interruption.

Tuesday, October 21st

QuickBooks Connect Begins

Special Kickoff Event:

with Joe Woodard and Doug Sleeter

12:00-1:40 PM

"A paradigm shift:
The impact of data automation on
the accounting industry"

Our industry is at the beginning of a major paradigm shift, where many accounting firms are once again prioritizing client accounting services. Some firms are offering real time bookkeeping services. Others are even managing all of their client's back office processes — a service called Business Process Outsourcing (BPO). During this cutting edge presentation, Joe describes this change in direction, the strategic benefits involved, and the technologies that are driving the shift, especially those technologies that streamline workflow and automate data entry.

"Small business cloud migration:
how to transition your clients
without creating a tornado"

Accountants today must be able to manage the migration of multiple connected systems in the cloud. Being able to see the data from anywhere allows accountants to be more efficient and provide better client services 24/7. For firms transitioning clients to the cloud, moving these systems and data can be a difficult process which cannot be accomplished in a piecemeal fashion. Doug Sleeter will share important knowledge which will shed light on this process, as well as reveal ground breaking data on how the cloud migration is affecting all small business models.

Includes a fireside chat with Joe and Doug with audience Q&A.

Presenters Joe Woodard and Doug Sleeter	**Field of Study:** Specialized Knowledge and Applications
Prerequisites: None	**Recommended CPE:** 2 Credits
Program Level: Basic	**Delivery Method:** Group Live

Tuesday, October 21st

QuickBooks Connect Breakout Sessions

QuickBooks Online Advanced ProAdvisor Certification exam preparation (2:00-7:30)

This special multi-session course (presented for the first time during QuickBooks Connect) prepares ProAdvisors to take the all new QuickBooks Online Advanced Certification Exam. The new QuickBooks Online Advanced Certification designation helps ProAdvisors further differentiate themselves as QuickBooks Online experts to their current and prospective small business clients. This course is a blend of scenario-based situations and complex problem solving using QuickBooks Online.

After attending this powerful new course on QuickBooks Online you will be able to:

- Manage complex conversions to QuickBooks Online
- Handle in-depth customization of QuickBooks Online
- Train your clients on the use of advanced features in QuickBooks Online
- Troubleshoot common data entry errors clients make when using QuickBooks Online
- Provide Advisory Services to those clients needing additional support

Instructor: Michelle Long
Program Level: Advanced
Prerequisites: QuickBooks Online Certification
Delivery Method: Group Live
Recommended CPE: 6 credits
Field of Study: Specialized Knowledge and Applications

Note: All accounting professionals are eligible to take this course, but only members of the ProAdvisor Program or Cloud ProAdvisor Program who are certified in QuickBooks Online are eligible to take the associated certification exam.

Note: This course is designed to prepare ProAdvisors to pass the QuickBooks Online Advanced Certification Exam, but participation in this course does not guarantee the attendee will pass the exam.

Note: This course does not include testing. Attendees can access the QuickBooks Online Certification Exam in the online ProAdvisor certification center.

Note: Attendees of this course will receive advanced access to the QuickBooks Online Advanced ProAdvisor Certification Exam—prior to the exam being offered to the rest of the ProAdvisor and Cloud ProAdvisor Programs.

Tuesday, October 21st

QuickBooks Connect Breakout Sessions

QuickBooks Online Certification exam preparation (2:00-5:30 PM)

This special multi-session course prepares ProAdvisors to take the QuickBooks Online Certification Exam and equips ProAdvisors to support their clients who use QuickBooks Online. The subject matter is broad...and comprehensive, covering the fundamentals of QuickBooks Online and the unique features available in QuickBooks Online Accountant.

Topics and QuickBooks features addressed during this course include:

Recognizing the advantages of using QuickBooks Online	Setting Up QuickBooks Online	Identifying tools and resources for accounting professionals	Performing common workflows using QuickBooks Online
Using the Accountant Home feature	Recording sales and revenue transactions	Recording expense and purchase transactions	Using the reporting feature in QuickBooks Online
Identifying best practices for troubleshooting client errors	Using Accountant Tools to troubleshooting errors	Identifying and activating QuickBooks payments	Setting up and using payroll in QuickBooks Online
Identifying the steps to explore, purchase and access QuickBooks Online Apps	Leveraging unique billing options for you as an accounting professional	Connecting your QuickBooks Online Accountant subscription to your client's subscriptions	Managing the client account list

Instructor: Laura Redmond
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 3.5 Credits
Field of Study: Specialized Knowledge and Applications

Note: All accounting professionals are eligible to take this course, but only members of the ProAdvisor Program or Cloud ProAdvisor Program are eligible to take the associated certification exam.

Note: This course is designed to prepare ProAdvisors to pass the QuickBooks Online Certification Exam, but participation in this course does not guarantee the attendee will pass the exam.

Note: This course does not include testing. Attendees can access the QuickBooks Online Certification Exam in the online ProAdvisor certification center.

Tuesday, October 21st

QuickBooks Connect Breakout Sessions

Navigating your clients to predictable success (2:00-3:40 PM)

Is success in business a transient, hard-to-define combination of hard work, judgment and good luck? Or do all successful organizations follow similar patterns that, once understood, are predictable and repeatable? Les McKeown demonstrates unequivocally that any organization's success can indeed be made predictable simply by understanding and following a clear, repeatable pattern. Learn how to apply this pattern to navigate your clients to predictable success.

Instructor: Les McKeown
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Automating and streamlining your workflow (2:00-3:40 PM)

With the introduction of cloud technologies, accounting solutions have evolved from products to platforms. As platforms, accounting solutions like QuickBooks Online have become integration hubs, connecting multiple workflow tools together into a single, seamless stream of data that connects front end transactions directly to the back office, and then connects the back office to powerful interpretation and analysis tools. Learn how each of our expert panelists have leveraged integrated cloud workflow solutions into their practices and the way these technologies have made their practices more efficient, effective and profitable.

Instructor: Panel Session Moderated by Joe Woodard
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Tuesday, October 21st

QuickBooks Connect Breakout Sessions

Intuit Tax Online 101: A comprehensive introduction (2:00-3:40 PM)

This session covers the fundamentals of Intuit Tax Online. During this session we will provide a full demonstration of the product, share Intuit's vision and direction, and help you determine if Intuit Tax Online is the right solution for your practice.

Attend this in-depth technical course to:

- Learn how-to-use Intuit Tax Online
- Experience innovative capabilities like integration with QuickBooks Online, W-2 import, tax practice dashboard and more…
- Learn how the mobile application can help you more efficiently manage your practice
- Understand the benefits of Intuit Tax Online for your employees and your practice

Instructor: Jorge Olavarrieta, Product Manager, Intuit Tax Online
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Intuit Tax Online—town hall (4:00-5:30 PM)

Hear from a variety of current Intuit Tax Online customers. Understand how Intuit Tax Online has helped them work more efficiently with their clients. Come ask candid questions about tax prep in the cloud for tax preparers like you.

Panelists: TBA
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 1.5 Credits
Field of Study: Specialized Knowledge and Applications

Tuesday, October 21st

QuickBooks Connect Breakout Sessions

Disruptive technologies: Catching the wave (4:00-5:30 PM)

This session examines the multitude of “disruptive technologies” that are destroying some of our clients’ traditional business models while simultaneously creating amazing new opportunities for others. As a “trusted advisor” you need to understand these threats and be ready to help your clients not only survive but also thrive in the face of this upheaval. You’ll be amazed (and probably troubled) as we discuss today’s “buggy whip manufacturers”!

Instructor: Greg LaFollette
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 1.5 Credits
Field of Study: Specialized Knowledge and Applications

Back to the field: How real time involvement in client bookkeeping can revolutionize your practice (4:00-5:30 PM)

Key technology shifts are eliminating much (if not most) of the data entry required to maintain accurate and timely financial reports. As accounting professionals, we have an unprecedented opportunity through these technologies to significantly streamline our clients’ back office processes—or even to bring client bookkeeping processes back in house. Either way, with accurate real time reporting, accounting professionals can now shift the focus of our client engagements toward more proactive services like data interpretation, strategic planning and—ultimately—to contributing to client success.

Instructor: Panel Session Moderated by Joe Woodard
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 1.5 Credits
Field of Study: Specialized Knowledge and Applications

Welcome Reception

5:30-8:30 PM

Visit the conference website at QuickBooksConnect.com for more information.

Wednesday, October 22nd

QuickBooks Connect Breakout Sessions

QuickBooks Online Accountant: Your friend at year-end

(10:50 AM-12:30 PM)

This course covers the tools in QuickBooks Online Accountant specifically designed to make year-end processes easier to manage. QuickBooks Online Accountant includes tools that streamline the preparation of adjusting journal entries, allow you to work in your client's QuickBooks files remotely, and empower you to collaborate with your client regarding year end accounting processes and financial reporting.

This in-depth technical course equips you to:

- Streamline year end processes for your clients who use QuickBooks Online
- Provide more timely and detailed financial reporting to your clients at year end…and throughout the year as well
- Increase lines of communication between you and your clients regarding their financial position and performance

Instructor: Michelle Long
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Ask the experts: QBO small firm practitioner panel (10:50 AM-12:30 PM)

Bring your toughest questions about QuickBooks Online!

Our panel of highly experienced QuickBooks Online practitioners will attempt to answer each and every question addressed to them during this high energy Q&A session.

- Are there features you don't understand?
- Problems you are having setting up QBO?
- Questions your clients have asked you that you couldn't answer?
- Do you need help converting from QuickBooks Desktop to QBO?

Get the answers you need!

Moderator: Joe Woodard
Panelists: Stacy Kildal, Hector Garcia and Cathy Iconis
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Wednesday, October 22nd

QuickBooks Connect Breakout Sessions

Practitioner's panel: "Must know" tax hot topics for tax year 2014

(10:50 AM-12:30 PM)

Today's tax payers expect their tax professional to work online the way they do, and they expect them to have expert knowledge of hot topics ranging from the Affordable Care Act to cloud security. In this session, attendees will get insight on evolving tax payer needs, with a view of who today's tax payers are and how they like to work with professional tax preparers. Plus hear from leaders on the changing tax landscape.

Attend this panel session to:

- Gain the latest insights on tax payer motivations and needs
- Learn more about what Intuit's doing to put technology to work for you in creating friction-less client collaboration
- Understand the myths vs. the realities of cloud security
- Learn how accounting for the ACA will impact how you do taxes in TY14, plus how Intuit plans to address the changes.

Panelists: TBA
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Implementing value pricing: A radical business model for accounting firms (10:50 AM-12:30 PM)

This session answers the questions: What exactly is Value Pricing? What are the different value pricing models? How do we establish the value and set the client's expectations? What are the advantages? What are the pitfalls and how do we avoid them?

Attend this cutting edge practice development session to:

- Determine when value pricing is a good deal for both you and your client
- Learn how to implement value pricing in your firm

Instructor: Ron Baker
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Wednesday, October 22nd

QuickBooks Connect Breakout Sessions

From hindsight to insight: A roadmap to higher value for you and your clients (10:50 AM-12:30 PM)

The fastest way to expand your accounting practice is to expand what you are "accounting for." In this session you'll learn about a systematic approach to delivering high value advisory services that yields higher value relationships. Bonus: Participants will be given a mini-tool kit to help them promote, sell and successfully deliver advisory services.

Attend this cutting edge practice development session to:

- Learn how to stop delivering "Random Acts of Consulting" and start leveraging your time and talents more effectively.
- Learn how to position your firm as an advisory firm; uniquely focused on helping your small business clients succeed.
- Learn the most common mistakes firms are making when trying to promote advisory services and how to avoid these mistakes.
- Walk away with a new perspective on how to grow your practice beyond traditional accounting services

Instructor: Edi Osborne
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Troubleshooting QuickBooks Online: Top 10 mistakes (1:45-3:25 PM)

Many accounting professionals who setup QuickBooks Online for their clients find that, a few months down the road, there are significant errors in the reports or issues that need to be addressed in the data entry process. You should develop key troubleshooting skills in order to facilitate a proactive relationship with your clients who use QuickBooks Online

After attending this in-depth technical session you will be able to:

- Identify best practices for cleaning up common client data entry errors
- Fix common setup issues
- Identify resources for additional help

Instructor: Esther Karp
Prerequisites: An understanding of the fundamental use and navigation of QuickBooks Online
Program Level: Intermediate
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Wednesday, October 22nd

QuickBooks Connect Breakout Sessions

More clients please: Building the next generation accounting practice (1:45-3:25 PM)

Professional business development is key to growing your modern firm. This session will show you how to successfully develop and implement your own strategic marketing plan. Learn what works, what traps to avoid and how to develop a marketing culture in your firm.

Attend this cutting edge practice development session to:

- Understand the key components of a marketing plan, inbound versus outbound marketing, and why your online reputation matters
- Learn 14 of the best marketing ideas for accounting firms
- Learn proven steps to move from marketing educational to implementing a marketing plan

Instructor: Damien Greathead
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Leveraging Intuit cloud technology and programs to grow your practice (1:45-3:25 PM)

Looking for ways to grow your tax business by either getting more clients or offering more services? Intuit's Pro Tax Group has been innovating in these areas and would like to share some easy opportunities with you – TurboTax PersonalPro and our new Refund Transfer program, where we pay you to do RT's.

- Learn what TurboTax PersonalPro is and how it can help you serve a whole new client base
- Find out about our new Refund Transfer program and partnership with Amex, and learn how to put it to work for you

Instructors: Brian Crofts and Kevin Reinard
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Wednesday, October 22nd

QuickBooks Connect Breakout Sessions

Accountants as trusted advisors: Assuming a leadership role with your clients (1:45-3:25 PM)

Many of our clients' organizations suffer from lack of effective teams...or worse, even complete organizational dysfunction. In this course you will learn how you as an accounting professional can play a key, synergistic role that will move your clients from team gridlock into team efficiency and productivity. Based on the book *The Synergist* by Les McKeown

Instructor: Les McKeown
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Directions on the accounting industry: A thought leader panel discussion (1:45-3:25 PM)

Join Gary Boomer, Darren Root, Greg Lafollette and Joe Woodard as they discuss major influences on accounting professionals and their clients and how practitioners need to adapt their practices to directional shifts that impact firms of all sizes.

This panel session covers a wide range of factors impacting the accounting industry including:

- Disruptive technologies
- Shifts in the political and social trajectories
- Multi-generational influences
- Recent court rulings and the impact on tax preparers...and more!

Panelists: Gary Boomer, Darren Root, Greg LaFollette and Joe Woodard
Prerequisites: None
Program Level: Basic
Delivery Method: Group Live
Recommended CPE: 2 Credits
Field of Study: Specialized Knowledge and Applications

Night Market Party

6:30-10:00 PM

Join us in the Exhibit Hall of the San Jose Convention Center for extended time with exhibitors, networking with your peers, and other exciting evening activities.