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Houston CPA Society
A Chapter of the Texas Society of CPAs
Houston TSCPA Foundation

Helen Sharkey
Luncheon Speaker
May 20, 2013

24TH ANNUAL

SPRING ACCOUNTING EXPO

A Two-day Conference Designed for The Profession
Planned by Members in Business and Industry

Monday & Tuesday
May 20 & 21, 2013
reliant center
One Reliant Park

Robert W. "Bill" Gilmer, PhD
Director, UH Bauer Institute for Regional Forecasting
University of Houston
Luncheon Speaker
May 21, 2013

Schedule - Monday, May 20, 2013

	Track 1	Track 2	Track 3	Track 4	Track 5
7:15 AM	****Registration****				
8:00 AM	**Postmortem of Investor X: A Primer for the Exhausted Investor** *Steven R. Goodman, CPA, CFP* *Goodman Financial Corporation*	**Is QuickBooks Online Edition The Best Choice for You and Your Clients?** *Deborah Hroch* *Simple Solutions Consulting*	**From Boring to Brilliant: Creating Effective Business Presentations** *Christine M. Holllinden, CPSM* *Hollinden/professional services marketing*	**Best Practices for Developing & Growing A Business** *Christine R. Spray* *Strategic Catalyst, Inc.*	**Individual Tax Update** *Steven J. Tillinger, CPA* *Steven J. Tillinger, CPA*
9:40 AM	****Break with Refreshments ~ Visit Exhibits****				
10:00 AM	**Social Security 2013 Update** *Andrew Hardwick* *Social Security Administration*	**Internal Controls Remodeled: The New COSO Framework** *Dan T. Ramey, CPA, CVA, CFE, CFF, CIA, CISA* *PKF Texas*	**Data Analysis for CFOs and Controllers** *Chris Peters, CFE, MBA* *GPS Consultants LLC*	**Starting and Maintaining Your Practice: Lessons for New and Established Firms** *Richard M. Forrest, CPA, JD, and Frank L. McElroy, JD* *Forrest Law Group, PC*	**Small Business Tax Update** *Steven J. Tillinger, CPA* *Steven J. Tillinger, CPA*
11:40 AM	**Seated Luncheon – Helen Sharkey**				
1:20 PM	**Financial Crisis Accounting Failures: Did SOX Fail the System** *Stephen V. Arbogast* *University of Houston*	**Brain Rules for Thinking Smarter** *Cathy Nunnally, CPA, PCC* *Nunnally & Company*	**Enhanced Productivity Through Office and SharePoint** *Rafael Perez* *Microsoft Corporation*	**Making Teamwork Profitable** *Michael R. Goodfriend, CPA* *Goodfriend and Associates Inc.*	**The Mayans Lied : We Now Have to Face Obamacare !** *Richard W. Nevins, CPA* *Chapman Schewe Benefits Consulting, a Higginbotham company*
3:00 PM	****Break with Refreshments ~ Visit Exhibits****				
3:20 PM	**The Sound and The Fury: 2013 Employment Law Update** *W. Jackson Wisdom, JD* *Martin, Disiere, Jefferson & Wisdom LLP*	**Hot Topics in Tax Enforcement** *Larry A. Campagna, JD* *Chamberlain, Hrdlicka, White, Williams & Aughtry*	**Digital Forensics** *Anthony Gawron, CFE* *KPMG LLP*	**Healthcare Compliance** *Lisa Brown* *Aon Hewitt*	**The Art of the CFO** *James R. Wilkinson, CPA* *The Strategic CFO, LLC*
5:00 PM	****Social Hour – Visit Exhibits****				

Schedule - Tuesday, May 21, 2013

	Track 1	Track 2	Track 3	Track 4	Track 5
7:15 AM	****Registration****				
8:00 AM	**Going Mobile: iPad, iPhone at Work** *Bobby Doss* *Sparkhound, Inc.*	**Anti-Corruption Compliance: Fear-Based vs. Risk-Based Compliance Programs** *Michelle A. Blaine, JD* *Blaine & Maney*	**Managing Conflicts in Work Teams With Diverse Personalities** *Jamie Belinne, SPHR* *University of Houston*	**Texas Property Tax 101: What Every CPA Should Know** *John Brusniak, JD* *Brusniak/Blackwell PC*	**You Can't Get the Grease Without the Lease: Oil & Gas Basics** *Tamara G. Woods, CPA, JD, LLM and Sebastien Chain, JD, LLM,* *Chamberlain Hrdlicka White Williams & Aughtry*
9:40 AM	****Break with Refreshments ~ Visit Exhibits****				
10:00 AM	**Motivatin' & Delegatin'** *Charles "Chuck" Cummings, CPA/CFF, CFE* *Cummings & Houston LLP*	**Technology Update** *Bryan L. Wilton, CPA, CITP* *InterDyn BMI*	**Transfer Pricing: Current Situations and Trends in the U.S. and Globally** *Carlos Linares-Garcia, PhD, Baker & McKenzie Mexico, SC, and Thomas S. Respess, III, JD, PhD, Baker & McKenzie Consulting LLC*	**Dodd-Frank Act** *Paul Campbell* *Deloitte & Touche LLP*	**Making Sense of Today's Economy and Investing** *Kate Warne, PhD* *Edward Jones*
11:40 AM	**Seated Luncheon – Robert W. "Bill" Gilmer, PhD**				
1:20 PM	**Energy Update** *John T. Vickers, CPA, Coleman Rowland, CPA, and Jeff Craft* *Deloitte & Touche LLP*	**medicare/Medicaid: A Primer on the Basics** *Pi-Yi Mayo, JD* *Law Offices of Pi-Yi Mayo*	**Fraud in the Workplace : Schemes and Strategies** *Lynn L. Menard, CPA, CFE* *Gainer Donnelly LLP*	**10 Steps to Understanding and Implementing Cloud Computing** *Yahuda Cagen* *Xvand Technology*	**Ethics for CPAs: It's a Matter of Choice** *Deanna Sullivan, CIA, CPA, CFE* *SullivanSolutions*
3:00 PM	****Break with Refreshments ~ Visit Exhibits****				
3:20 PM	**Excel 2013: What's New?** *Carolyn A. Miles, CPA, CISA* *University of Houston Clear Lake*	**Managing Strategic Risks** *Paul Feiler, PhD* *Breakthrough Leadership Strategies LLC*	**Auditing and Internal Controls for Capital Maintenance Projects** *Warren Hudson, CIA, CFE, CRMA, CCA* *Cupp & Hudson, LLP*	**Accounting & Auditing Update** *Raymie K. Daroga, CPA* *UHY LLP*	**Ethics (continued)**
5:00 PM	****Adjourn****				

Course Objective: *Give attendees the opportunity to receive updates/overviews on topics relevant to various industries.*

Level of instruction: *Basic/Overview/Update, unless otherwise noted.* ***Prerequisite***: *None*

MONDAY, MAY 20, 2013

8:00 AM

Track 1 **Postmortem of Investor X: A Primer for the Exhausted Investor** – A primer for the exhausted investor that will empower the attendee via an examination of Investor X, a case study to learn from in twelve slides or less.

Track 2 **Is QuickBooks Online Edition the Best Choice For You and Your Client?** – Today's environment mandates 24/7 access and real time data. QuickBooks Online Edition provides both, yet, is it the best choice for you and your clients? Like the conveniences of the QuickBooks Online Edition, but not the limitations in the software? This session will help you determine which industries are the perfect match for QuickBooks Online Edition. Still need the conveniences and the performance power of QuickBooks Pro, QuickBooks Premiere and QuickBooks Enterprise editions? You will walk away from this session understanding how you can have it all! *Intermediate*

Track 3 **From Boring to Brilliant: Creating Effective Business Presentations** – Have you ever had to give a presentation only to see your audience constantly checking their smart phones? Then this workshop is for you. This session addresses vital elements of business presentations including strategy, core message development, and the use of visuals to move your audience to action. With the insight of this experienced marketer and coach, your presentations will never be the same.

Track 4 **Best Practices for Developing & Growing a Business** – Whether you are considering starting a business or hoping that your business is going to take off, it is much more comfortable to continue dreaming than doing something about it. If having the funds and a plan to start and grow a business is where you are, then get the ball rolling by stop dreaming and do it. In this workshop, attendees will learn where to start, who to talk to, what systems and people you need to know - and more to start and grow your business or to take your current business to the next level! *Intermediate to Advanced*

Track 5 **Individual Tax Update –** Discussion will focus on developments in individual federal income taxation including recent federal income tax legislation, important court cases, Treasury income tax regulations and IRS revenue rulings and procedures.

10:00 AM

Track 1 **Social Security 2013 Update** – A review of Social Security benefit programs including disability, survivor and retirement. Medicare Parts A, B, and D will be discussed, as well as Internet options available in dealing with Social Security.

Track 2 **Internal Controls Remodeled: The New COSO Framework** – The original COSO framework for internal controls has been "remodeled" and is now ready for viewing. Join Dan Ramey as he walks through the remodeled COSO framework pointing out the changes and how you can use the new COSO to strengthen your internal control environment to better your business processes and reduce the likelihood of fraud in your organization. *Intermediate*

Track 3 **Data Analysis for CFOs & Controllers** – Data analysis techniques used to detect and prevent fraud, waste and abuse.

Track 4 **Starting and Maintaining Your Practice: Lessons for New and Established Firms** – You will be provided with information concerning a wide range of issues that are encountered often by CPA firms just starting their practice and related to maintaining their license to practice public accountancy. Topics will include, among others, complying with TSBPA rules, insurance and liability limitations.

Track 5 **Small Business Tax Update** – Discussion will focus on developments in small business federal income taxation including recent federal income tax legislation, important court cases, Treasury income tax regulations and IRS revenue rulings and procedures.

11:40 AM – 1:00 PM - LUNCH

Low Man on the Totem Pole: How I Became a White Collar Criminal - In 2003, Helen Sharkey was one of three Dynegy employees charged by the United States Attorney's Office for their involvement on a $300 million structured finance transaction called Project Alpha. She subsequently pled guilty, was sentenced to 30 days in Federal prison, fined $10,000 and had six months of in-home confinement. By speaking publicly about her experience, she is hoping to educate others about the potential exposures present at all levels within an organization.

1:20 PM

Track 1 **Financial Crisis Accounting Failures: Did SOX Fail the System? –** Examine why accounting fraud continues to plague major financial firms despite SOX requirements and penalties. This presentation will cover instances of accounting misstatements coming out of the financial crisis and the applications of SOX to these incidents.

Track 2 **Brain Rules for Thinking Smarter** – This lively and fascinating session will reveal scientifically proven brain rules that drive our behavior. Attendees will walk away with practical ways to consciously change their lives for the better based on a deeper understanding of how the brain works. Session takeaways will cover the delusion of multi-tasking, the keys to effective presentations and tips to improve memory.

Track 3 **Enhanced Productivity Through Office and SharePoint** – Office and SharePoint are both very production solutions by themselves. When you combine them together you can take productivity to a whole new level. This session will focus on how to get the most out of both products individually and together.

Track 4 **Making Teamwork Profitable** – Does teamwork show up on your company's P&L? You might need new reading glasses, because it's there. Mike Goodfriend will share TeamScene™ - A Teamwork Competency Model for Leadership Teams. Learn about some of the tools and methods for teamwork systems so you can begin making teamwork profitable.

Track 5 **The Mayans Lied: We Now Have to Face Obamacare! –** The next five years will change healthcare as we know it. Find out about Exchanges, Essential Benefits, new taxes, mandates and whether your firm will have to offer benefits. Learn strategies to handle these changes and create plans to control costs.

3:20 PM

Track 1 **The Sound and the Fury: 2013 Employment Law Update** – The Department of Labor is celebrating its 100th birthday by pursuing a transformational regulatory and enforcement agenda with confidence and vigor. The courts are working overtime to keep up with class action lawsuits relating to unpaid overtime, and a boom in discrimination claims. Employers are trying to stay in business and keep out of trouble. This presentation will touch on the most significant developments in labor and employment law, and will offer practical advice to employers seeking refuge from the tempest.

Track 2 **Hot Topics in Tax Enforcement** – A focus on hot issues in the tax controversy arena, including IRS enforcement priorities, proposed changes to Circular 230, the new "Wealth Squad" audits, worker reclassification, and the continued war on foreign accounts.

Track 3 **Digital Forensics -** An introduction into how digital forensics expands the field of accounting and its role in investigations and proactive compliance. From case studies to do-it-yourself tricks we will explore how digital forensics is being used, legal pitfalls, and suggestions attendees can share with their teams.

Track 4 **Healthcare Compliance** – Get a better understanding of the provisions of Healthcare Reform under the Affordable Care Act (ACA). It is not just about compliance with the law, but to also understand the impact on the healthcare industry and the opportunity employers have to reconsider their healthcare strategy in order to position their plans for the future.

Track 5 **The Art of the CFO** – A demonstration how learning the Art of the CFO can help you improve the profitability and cash flow of your organization and how it can take you to the next level.

A link to speakers' course materials will be provided to offer you the opportunity for downloading those of interest prior to the Expo.

TUESDAY, MAY 21, 2013

8:00 AM

Track 1 **Going Mobile: iPad and iPhone at Work** – Many of us carry multiple devices today. Many of us carry a phone (probably an iPhone), a laptop and some sort of mobile device (probably an iPad or iPad mini). If you find yourself tied to these devices, come find out how to keep them in sync and you more productive.

Track 2 **Anti-Corruption Compliance: Fear-Based vs. Risk-Based Compliance Programs** – Many companies attempt to implement anti-corruption programs that do not fit their company's operations, size or locations. Such "fear-based" programs are often unfeasible and can be time-consuming, cumbersome and expensive without actually addressing corruption risk specific to the company. That can do more harm than good. This presentation will help participants understand the risks under global anti-corruption laws, the importance of a risk analysis and development of a practical program that focuses on corruption risk unique to each company. The program will also give the audience an update on current anti-corruption trends and a brief overview of the laws.

Track 3 **Managing Conflict in Work Teams With Diverse Personalities** – Learn how to understand and deal with the special people in our work lives that seem to make things difficult for us. Learn how to protect and promote your own goals without being a "jerk" or a "doormat."

Track 4 **Texas Property Tax 101: What Every CPA Should Know** – A direct comprehensive overview of the Texas Property Tax system focusing on the important aspects of valuation, equalization, exemptions and special valuations of properties for *ad valorem* tax purposes. This session will focus on how CPAs can participate in the system and add value to their clients.

Track 5 **You Can't Get the Grease Without a Lease: Oil and Gas Basics** – This session focuses on oil and gas contracts and taxation, with particular emphasis on acquisitions and dispositions of mineral interests, cost recovery for exploration and development and depletion, and general contract issues in oil and gas transactions.

10:00 AM

Track 1 **Motivatin' and Delegatin' –** Learn practical, low-cost and effective principles and techniques to truly motivate others and to delegate to the people you manage in order to reach your own desired goals at work and in life while at the same time creating an encouraging, motivational and energetic work environment for your people.

Track 2 **Technology Update –** A fast paced review of business technology tools available for the next year or two.

Track 3 **Transfer Pricing: Current Situation and Trends in the U.S. and Globally** – An overview of the fundamentals of transfer pricing, compliance requirements and audit trends in the U.S. and other jurisdictions.

Track 4 **Dodd-Frank Act –** This presentation will cover the impact the Dodd-Frank Act will have on the energy industry, with a specific focus on Title VII (Use of swaps and derivatives) as well as a brief overview of Sec 1502 (Conflict Minerals) and Sec 1504 (Financial disclosure of payments to governments). The purpose is to highlight requirements and provide a perspective on the status of the energy industry relative to readiness and implementation.

Track 5 **Making Sense of Today's Economy and Investing -** What's the outlook for stocks and bonds? How important are concerns about deficits, inflation, interest rates and the global economy? What are the strategies to use in today's markets? Kate Warne will address these questions, talk about building investment portfolios, and provide some recommendations.

11:40 AM – 1:00 PM - LUNCH

Houston 2013: Continued Growth, But More Risk to the Expansion

Houston will finish up a year of very strong growth in 2012, adding close to 100,000 jobs once the books are finally closed. Some of the strength of 2012 will be sapped by a slowdown and weaker margins in the upstream energy sector, as low natural gas prices persist. This is partly offset by continued strength in oil-directed drilling and the return of offshore activity. And a construction boom will continue in pipeline and petrochemical construction. But there are higher risks to this outlook than before. The US economy limps into 2013 growing at a one percent rate, and faces large potential tax hikes. The global economy has slowed sharply, and is at risk until we see the expected upturn in the second half of 2013.

1:20 PM

Track 1 **Energy Update** – A discussion on current trends, key market drivers, and implications of the New Lease Accounting exposure draft on the oil and gas industry. Dodd Frank Section 1504 and the impact on the energy industry will also be covered.

Track 2 **Medicare/Medicaid: A Primer on the Basics** –.Learn the basic differences, applications and qualifications for both Medicare and Medicaid.

Track 3 **Fraud in the Workplace: Schemes and Strategies –** Occupational fraud is a serious problem for any business. According to the ACFE, the typical business loses 5% of its annual revenue to fraud! In this session, we'll discuss the latest trends in fraud schemes, the characteristics of fraudsters (along with some recent case studies), and the best anti-fraud tools that are critical components of an effective fraud prevention and detection strategy.

Track 4 **10 Steps to Understanding and Implementing Cloud Computing –** Cloud Computing had transformed the business landscape. When researching a move to the cloud it's imperative to create an internal assessment and understand the roles, bottlenecks and productivity and security traps.

Track 5 **Ethics for CPAs: It's a Matter of Choice*** – Ethics and Integrity – Popular buzz words for the past decade. Yet we still hear about financial statement fraud, misuse of assets and theft within our organizations. What are we as CPAs to do to respond to this situation? What are our responsibilities to the public and to the Board? What can we do to create a more ethical environment within our organizations? Join us for an interactive session where participants will have the opportunity to: become educated in the ethics of the profession; understand the TSBPA's Rules of Professional Conduct and the core values of our profession; practice applying ethical judgment in interpreting these rules and values; learn to utilize these ethical principals in making choices appropriate for the profession and the public; learn about the components and red flags of fraud; and take an ethics test to measure against the fraudsters. The public looks to us as a standard of ethics and integrity. Are we able to meet the challenge? It's all a matter of choice.

*This course is designed to meet the Texas State Board of Public Accountancy's Ethics Course Requirements for Licensees for four hours of continuing education.

3:20 PM

Track 1 **Excel 2013: What's New?** – Learn what is new in Excel 2013 and how to use Excel 2013 for more informed decisions. *Intermediate*

Track 2 **Managing Strategic Risk** – Strategic risks differ from other kinds of risk. Leaders often fail to adequately manage strategic risks because they take a "point-of-risk" approach. To be effective in protecting an organization's ability to create future sustainable value, effective leaders approach strategic risks from the perspective of a comprehensive holistic strategic framework, such as the "strategy map." This presentation describes the holistic approach and the essential steps involved in managing strategic risks within it.

Track 3 **Auditing and Internal Control Considerations for Capital Maintenance Projects** – A discussion of the nuances of capital maintenance programs, understanding cost drivers, and examining project structure. See how project management and cost tracking are directly related to contractual relationships. Finally, learn project management pitfalls and testing/control considerations.

Track 4 **Accounting and Auditing Update –** An overview of the latest developments in accounting and auditing.

Track 5 **Ethics for CPAs: It's a Matter of Choice (continued)**

REGISTRATION

SAE905.X

PROGRAM DATES: (please mark the dates you will attend)

MAY 20, 2013 ❑ MAY 21, 2013 ❑ BOTH MAY 20 & 21 ❑

I would like to attend the Ethics session on May 21, 2013 ❑

CPE CREDIT: 9 HOURS PER DAY

Are you a CPA? Yes ❑ No ❑ **New Firm/Address?** ❑

Name ______________________ **Badge Name** ____________

Firm Name ____

Street Address _____________________________________

City __________________ **State** ___________ **Zip** ________

Business Phone No. ______________ **Home Phone No.**__________

Email Address ______________________________________

Check one fee category:

Houston/Other Chapter Member or Non-CPA
❑ One Day $225
❑ Two Days $325

Nonmember CPA
❑ One Day $300
❑ Two Days $400

For registrations received after 5:00 PM, Monday, May 13, 2013 and walk-in registrations add $25.00 to the above prices.

❑ ADA Requirements ❑ Special Dietary Needs ________________

For Credit Card Payment: __ Visa __ MasterCard __ Discover __AMEX

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Mail Registration and Payment to:
Houston TSCPA Foundation
777 Post Oak Blvd., Suite 500
Houston, TX 77056-3212
Phone: 713.622.7733

Fax Registrations With Credit Card Payment to: 713.622.3327

Register Online at:
www.houstoncpa.org

FACTS YOU SHOULD KNOW

Registration and Fees

Registration fees for this two-day expo are $325 for Houston/other Chapter members and non-CPAs, and $400 for nonmember CPAs. Fee includes admission, continental breakfast, coffee and refreshment breaks, seated luncheons and program materials. Registration will begin at 7:15 AM.

Cancellation and Substitution Policy

Registrants who cancel prior to May 13, 2013 are subject to a $25 cancellation charge. NO REFUNDS will be issued on cancellations received after May 13, 2013. A registration may be transferred to another individual if a registrant is unable to attend. An additional registration fee will be charged to a nonmember CPA transferee. **No shows forfeit the entire registration fee.**

CPE Credit

CPE credit for the conference is 18 hours (9 hours each day). Partial CPE credit will be given for partial attendance with one-half CPE credit increments permitted after the first contact hour has been earned. TSBPA registered sponsor ID #000094.

Other Information

Satisfactory meeting room temperatures are difficult to maintain. Registrants may wish to bring a sweater or jacket to ensure comfort. Please turn off cellular phones and pagers while in session rooms. Smoking is prohibited in the facility at all times.

Tax Information

The IRS will allow only 50% of all expenses for business meals/entertainment as deductible for tax purposes. The definition of meals includes continental breakfasts, refreshment breaks, lunches and receptions at professional seminars and conferences, including taxes and gratuities. Cost per day: $65.00.

Reliant Park

Reliant Park is located within the Inner Loop of the southern portion of Interstate Loop 610 between Kirby Street and Fannin Street. Attendees will use the McNee entrance off Kirby (entrance #10). Parking is presently $10.00/day, cash only *(subject to change without notice)* at Reliant Park with **no in-and-out privileges**. Parking for the event will be in the North Fannin (orange) parking lot.

Alternative transportation for the same price or less: Metro bus from a Park & Ride lot to downtown or the South Fannin Park & Ride lot. From there, connect to light rail which has a station on Fannin at Reliant Center.

Hotel Information

Courtyard by Marriott Medical Center
7702 Main St., Houston 77030
Phone: 713.668.4500
Conference Rate: $139.00
Room Rate Cut-off Date: May 5, 2013
Shuttle service is available. Please make arrangements when making your room reservation.

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2013 Spring Accounting Expo

May 20-21, 2013

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Plan to attend the Social Hour
Monday, May 20,
5:00 to 6:00 PM
Drawing for 2014 Expo Registration
(Must be present to win)