THRIVE

Scaling New Heights®

Conference Breakout Sessions

Scaling New Heights®

#SNH22

Sunday, June 19

Sunday – 12:00-1:40 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Microsoft 365 - All the Things You Need to Know	Randy Johnston	06/19/2022	12:00 pm – 1:40 pm	Microsoft 365/Office 365 continues to grow and evolve, yet most utilize only a fraction of the tools available in their subscription. For example, powerful resources such as SharePoint Online and Skype for Business can change how your entire organization communicates and collaborates. In contrast, more personal apps such as Teams, Planner, Flow, and Sway allow individuals to work more efficiently and effectively in virtually all facets of their jobs. Further, security enhancements to Office 365 mean that your organization can take advantage of all these features in a highly secure environment. Isn't it time you learned how to move beyond the traditional Microsoft 365/Office 365 applications such as Excel, Word, and Outlook and unleash all your subscription offers? Join us in this fast-paced and highly interactive seminar where you will learn what you need to know to be truly successful with Microsoft 365/Office 365.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Sunday – 12:00-1:40 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Introduction to QuickBooks Online Advanced	Erin Walsh Dyer	06/19/2022	12:00 pm – 1:40 pm	This session will explore features of the most robust version of QuickBooks Online. Discover the value of QuickBooks Online Advanced with deep dive demos and discussion. Save time, automate workflows, and support your mid-market clients by working smarter not harder.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0
Introduction to QuickBooks Online	Michelle Long	6/19/2022	12:00 pm – 1:40 pm	Are you ready to learn about QuickBooks Online (QBO) and QuickBooks Online Accountant (QBOA)? In this session, we'll be demoing in QBO/QBOA giving you an intro to key features, tools and more. Specifically, we'll discuss: navigating tips & tricks, key workflows for sales and expenditures, intro to bank feeds and bank rules and more!	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Sunday – 12:00-1:40 PM

Session Name	Instructor	Date	Time	Description	Additional Information
What Do You Need to Know About QuickBooks Online Payroll	MB Raimondi	06/19/2022	12:00 pm – 1:40 pm	QuickBooks Online Payroll has evolved over the years. You need to know the offerings and which subscription level is right for which client. This session will cover: subscription levels, setting up payroll, running payroll and troubleshooting	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Sunday – 12:00-1:40 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Strategies for the Intuit Centric Professional	Robin Hall	06/19/2022	12:00 pm – 1:40 pm	Many accounting professionals look at their clients' 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.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0
7 Secrets to Building a Successful Business Advisory Revenue Stream	Peter Hickey	06/19/2022	12:00 pm – 1:40 pm	This explores the secrets to building a successful business advisory practice. In this session, we will discuss everything from winning clients to building a successful business model. We will demonstrate a step-by-step process on how to build the advisory side of the practice, how to win and run client discovery meetings, how to build confidence and how to make the first sale. Then, we will explore by using practical tools what to do during a monthly client meeting, and how to structure them so that they are fun, enjoyable, effective yet still highly profitable. We will have a look at sample charge rates for clients and how to set up a recurring revenue client.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0

Sunday – 12:00-1:40 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Time's UP!: The Subscription Business Model for Accounting Firms	Ron Baker	06/19/2022	12:00 pm – 1:40 pm	The world is moving from products and services to subscriptions, favoring access and transformations over ownership and deliverables. The advantages to a subscription model are many, including: Predictable revenue; not selling services, but creating annuities with a lifetime value that far exceeds whatever you paid to acquire them; collective knowledge of your customers, which is a competitive advantage that cannot be duplicated; the customer relationship is at the center of the firm; not pricing a product or service, but rather a series of customer transformations, peace of mind, and convenience; and it is easier to predict demand and plan capacity more effectively.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0

Sunday – 12:00-1:40 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Top 10 Things to Know to Work with Non-Profit Organizations	Ufuoma Ogaga	06/19/2022	12:00 pm – 1:40 pm	Serving the nonprofit community is not for the faint heart. You have to understand the operations, mindset, and relationships that often drive the finances of nonprofit organizations. Join nonprofit expert, Ufuoma Ogaga to learn the top 10 things you need to know to work with nonprofit organizations.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0
From 1 to Many: Starting & Staffing Your Firm's Hiring	Stephen Brown	6/19/2022	12:00 pm – 1:40 pm	Your first hire can be difficult - the next 5 hires even more so. What about 10, 20, 50? Hiring is both an art and a science and there are tools and techniques for effective hiring. Good hiring starts with some critical processes such as creating good job descriptions, recruiting, candidate vetting, interviewing, and deciding and extending an offer. There are also many tools, including HR Information Systems and Applicant Tracking Systems, that can help automate the hiring process. Come learn from the successes and failures of hiring from a firm that has hired dozens of people.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0

Sunday – 12:00-1:40 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Master Cash Flow Without Breaking a Sweat	Mike Milan	06/19/2022	12:00 pm – 1:40 pm	Here's the thing, cash flow is same for everyone! Just like any skill, once you learn it, it can never be unlearned. If you can do some basic math, then you can learn how to master cash flow. In this session, Cash Flow Mike will teach you several techniques to finding cash flow issues and correcting them. If you want to be invaluable to clients, teach them how to keep more of their own money in their pockets and how to avoid the anxiety associated with not being able to pay bills on time. Believe it or not, focusing on one calculation can be the difference. Attend this session to add cash flow to your client conversations with ease.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0

Sunday – 12:00-1:40 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Take a Day Off Weekly to Thrive	Lamont Nesbitt	06/19/2022	12:00 pm – 1:40 pm	How many hours did you work this week? Know anyone who went on vacation last week? Does that thought make you jealous or envious? Have you ever gone on vacation…and worked while you were on it? YOU are the key, without you most of your businesses do not exist, let alone run, or ever become efficient. What are you doing for YOU to improve your business? My suggestion is to take a day off, every week. When you are done telling yourself it can't be done, let me. How often do you charge your cell phone? Now tell me how useful, efficient or productive your phone is if you don't charge it for 3 days? Come realize how important you are! Dare to set aside a day off to NOT WORK…at all. Not only should you do it, I believe it is a vital key to unlocking your mind to achieve like you never have before. The version of you where you THRIVE is on the other side of some regular, scheduled, and intentional rest. Let's talk and discover some of the benefits together.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Personal Development CPE Hours: 2 EA/AFSP CE Hours: 0

Sunday – 2:00-3:40 PM

Session Name	Instructor	Date	Time	Description	Additional Information
QuickBooks Online Advanced Smart Reporting By Fathom	Erin Walsh Dyer	06/19/2022	2:00 pm – 3:40 pm	This session will introduce the advanced reporting features of Fathom. Get a clearer picture of business performance, in-depth analysis, integrated business planning, three-way cash flow forecasting, and micro forecasts. Included with QuickBooks Online Advanced subscriptions, Smart Reporting by Fathom syncs QuickBooks data and can up your advisory game with little to no effort.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0
Are You Ready to Play Matchmaker with Your Clients? How to Leverage Cloud Technology to Stay Relevant	Lynda Artesani	06/19/2022	2:00 pm – 3:40 pm	This course teaches accountants and bookkeepers how to leverage cloud technology to stay relevant in today's business environment. The course focuses on using robust cloud-based systems like QuickBooks Online and an industry-specific software of your choice. Learn how to harness the power of the cloud and AI to make your clients lives easier and your services more valuable.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Sunday – 2:00-3:40 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Automation with QuickBooks Online	Michelle Long	06/19/2022	2:00 pm – 3:40 pm	Did you know there are several workflows and things you can automate with QuickBooks Online? This can be a huge time saver for you and your clients. Plus, it improves accuracy in the data. Specifically, I'll be in QuickBooks Online demoing: bank feed rules & auto-add, fetch bank statements, automate sales workflows, recurring transactions, scheduled reports, mobile app and QBO Advanced Workflows.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Sunday – 2:00-3:40 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Be an Accountant Detective by Using the Client Data Review	Dan DeLong	06/19/2022	2:00 pm – 3:40 pm	The amount time you can save by using the Client Data Review by eliminating the guesswork of "what's changed" and "who did that?" can be tremendous. The arsenal of tools available can run the spectrum of find and fix, instant adjustment, to isolating the usual suspects so you can deal with them in short order. This session will be an overview of the Client Data Review tool, how to access it, and using to save you and your firm time.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0
What Is Your Money Mindset? How Your Mindset Affects Your Practice's Bottom Line	Shonette Sullivan	06/19/2022	2:00 pm – 3:40 pm	This session discusses how business owners feel or think about money and how it affects their bottom line. Many are not aware that their income will only grow as large as your mindset will allow. Many accountants and bookkeepers focus so heavily on increasing their clients' bottom line and often neglect their own. Many find themselves giving more value than is received. Success and wealth is achieved only through win-win situations. That is, a financial win for the client as well as a financial win for themselves.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0

Sunday – 2:00-3:40 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Technology Update	Randy Johnston	06/19/2022	2:00 pm – 3:40 pm	Which technology trends will impact you and your business? What emerging technologies will potentially help you to address security and efficiency? How will the emergence of Windows 11 affect you? Should you consider subscription-based software? What does the future of communication technology have in store for you? Get answers to these and other questions by participating in session review of technology trends and developments affecting virtually all business professionals.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Information Technology CPE Hours: 2 EA/AFSP CE Hours: 0
Measure What Matters to Customers: New Key Performance Indicators for the Subscription Service Model	Ron Baker	06/19/2022	2:00 pm – 3:40 pm	Two things change when you transition to a new business model: Your pricing strategies and your internal dashboard—the KPIs you look at. Uber and Airbnb do not utilize the same dashboard as taxi companies and Marriott hotels. KPIs for subscription-based businesses are well developed, and this session will describe some of the more critical ones. We will also explore customer centric KPIs that measure how customers define the success of your firm.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0

Sunday – 2:00-3:40 PM

Session Name	Instructor	Date	Time	Description	Additional Information
LinkedIn: Don't Merely Survive, Thrive	Brandy Derrick	06/19/2022	2:00 pm – 3:40 pm	Your business can prosper by utilizing LinkedIn to find and attract your target market. Stop selling and instead start attracting leads by implementing what you learn in this session. You will be shown how to improve your profile, where to find leads and ways to nurture them for better inbound prospecting. Bring your laptop and be ready to immediately start improving your LinkedIn strategy.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Marketing & Communications CPE Hours: 2 EA/AFSP CE Hours: 0
Vision Casting - Aligning Your Practice with Your True North	Patricia Hendrix	06/19/2022	2:00 pm – 3:40 pm	Have you defined a Vision Statement for your practice? Does it really speak to your WHY? Do you and your team live it and breathe it? Can your customers recite it? If you answered "no" to any of these questions, then this workshop is for you. Spend 100 minutes exploring the story that brought you to where you are today and aligning your practice with your True North.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Personal Development CPE Hours: 2 EA/AFSP CE Hours: 0

Sunday – 2:00-3:40 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Advanced Bookkeeping: AR Analytics	Brian Suthoff	06/19/2022	2:00 pm – 3:40 pm	Accounts receivable is one of the largest assets and largest source of risk for many small and midsize businesses. However, many businesses still rely on simple aging statements and misunderstood days sales outstanding (DSO) metrics to measure, track and prioritize their efforts. In this session we'll review the issues and improvements to traditional DSO, we'll review other metrics you can use with clients. We'll also explore ways to improve accounts receivable performance to boost cash flow and lower risk.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0
Commitments and Boundaries – Your YES Should Mean Something!	Kathy Grosskurth	06/19/2022	2:00 pm – 3:40 pm	Many years ago, my life was defined by a distinct pattern of making empty promises and disappointing those around me. Though I paid lip service to being sorry, I didn't really accept total responsibility. Therefore, these behaviors continued with the same results. My situation was hopeless… Until something happened that LITERALLY changed my life and way of thinking. My "A-HA!!!" moment occurred after reading a book on setting and keeping boundaries. After many years of embracing and implementing its principles, the hard work has helped me tremendously in protecting my internal and external boundaries so that my "YES" means YES and my "NO" means NO. Even though I still consider myself a work-in-progress, I am thankful that I CAN set appropriate boundaries in my life. And if I can do it, then you can, too!	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Personal Development CPE Hours: 2 EA/AFSP CE Hours: 0

Scaling New Heights®

#SNH22

Monday, June 20

Monday – 7:45 – 8:45 AM

Session Name	Instructor	Date	Time	Description	Additional Information
Going Upmarket: How to Transition from QBO to Microsoft Business Central	Lisa Varilek	06/20/2022	7:45 am – 8:45 am	Has your client outgrown QuickBooks and you're ready to grow with them? Built and optimized for small and medium businesses, Microsoft Dynamics 365 Business Central is an application for companies whose needs have gone beyond entry-level business applications or are replacing outdated legacy systems. Dynamics 365 BC centralizes all the data an organization needs to leverage automation, track performance, and make informed decisions for sales, service, and operations. Come learn how to identify a good prospect for BC, what to tell your client planning a transition from QBO and the assistance Pax8 can provide in helping you build a practice.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0
Patriot Software Crash Course: Getting Started with Accounting and Payroll	Annie Hambach	06/20/2022	7:45 am – 8:45 am	If you are new to Patriot, get an overview of our Partner Program, our accounting and payroll software, and learn how to add and set up clients.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0

Monday – 7:45 – 8:45 AM

Session Name	Instructor	Date	Time	Description	Additional Information
PROP It Up! PROP Accounting Software: Bridging the Gap for Small Business	Ted McCrae	06/20/2022	7:45 am – 8:45 am	There is a new sector of the accounting software market that has been developing in recent years. These new applications are designed to handle the Process and Resource Operation Planning (PROP) for a business. This gap between entry-level solutions and ERP solutions is being filled by PROP products, which are specifically designed to meet the needs of small businesses. This session will discuss what PROP accounting software is and how it can benefit you & your clients' business! Small companies have a lot of moving components. Small company owners don't want to be experts in accounting, logistics, or other fields. For most small business owners, ERP solutions are too big and expensive. Many of them, on the other hand, quickly outgrow the basic accounting modules such as just a general ledger, reporting, accounts payable This is where the Process and Resource Operation Planning (PROP) solutions come in for a business. These PROP products bridge the gap for small businesses between entry-level solutions and ERP solutions.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0

Monday – 7:45 – 8:45 AM

Session Name	Instructor	Date	Time	Description	Additional Information
Your Clients' Top 10 Payroll & HR Compliance Questions, Answered	Heather Sperduto Rocio Mendoza	06/20/2022	7:45 am – 8:45 am	Federal, state, and local governments continue to adopt new employment laws, regulations, and orders that affect the way employers hire, pay and provide benefits to their employees. These changes have left most small business owners questioning whether they have the right policies and procedures in place to protect themselves and their staff. To help provide the necessary guidance for accountants and their clients, ADP® recently analyzed more than 65,000 calls from small business owners to the ADP HR HelpDesk to compile the 10 most frequently asked payroll and HR compliance questions pertaining to wage & hour laws, benefits & leave, COVID-19, performance management and more.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 1 EA/AFSP CE Hours: 0
Business Automation Processes for Superior Customer Efficiencies	Vanessa Vasquez	06/20/2022	7:45 am – 8:45 am	Automation is an essential component of business success. Not only does it help businesses understand customers faster and at a deeper level, but it also helps them respond to concerns and issues rapidly, while driving meaningful engagements across the entire customer journey. Let's have breakfast together while we learn about how we can take advantage of automation and processes with clients in real-time without the hassle. Let's dive into the world of collaboration and optimum performance while helping our firm get more work done with the tools that we all need.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Information Technology CPE Hours: 1 EA/AFSP CE Hours: 0

Monday – 7:45 – 8:45 AM

Session Name	Instructor	Date	Time	Description	Additional Information
Why Automation is Essential for Finance Teams to Thrive	Sarah-Jayne Andre Pietramala	6/20/2022	7:45 am – 8:45 am	Remote work, rising customer expectations and economic uncertainty are not just legacies of the pandemic. They're significant challenges impacting the effectiveness of today's AP & AR teams. PYMNTS' research reveals that 93% of CFOs are digitizing finance processes. Automation is helping teams address issues and future-proof operations against the changes to come.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0
The Future of Spend Management	Zac Heinz	6/20/2022	7:45 am – 8:45 am	As costs climb and talent is harder to secure than ever, starting or evolving your firm's CAS practice by modernizing your business' spend management just might be the key to that next level growth you've been looking for. Join Zac Heinz from Divvy, a Bill.com company, to learn how modern spend management should be an integral part of your CAS offerings by simplifying your clients' finances, giving them more control and flexibility, and saving you tons of time by automating tedious manual processes like expense reports. Stop chasing receipts and start advising.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 1 EA/AFSP CE Hours: 0

Monday – 7:45 – 8:45 AM

Session Name	Instructor	Date	Time	Description	Additional Information
Migrating Your Firm to Microsoft	Sam Schuemacher Liz Scott Andrew Wall	6/20/2022	7:45 am – 8:45 am	Being in the accounting industry, we are responsible for our security and that of our clients. We must always consider security from our employees' internal workflows to client communication. Microsoft O365 offers a secure work environment to protect and govern sensitive data through its robust features, privacy policies, and cybersecurity protocols. We always want to stay proactive, and while migrating to Microsoft can feel like a daunting task, with SwizzStack's help, it doesn't have to be. In this power breakfast, join the conversation to uncover your firm's current security posture and how to mitigate your risk by converting to Microsoft.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0

Monday – 1:20 – 3:00 PM

Session Name	Instructor	Date	Time	Description	Additional Information
QuickBooks Online Accountant Clean-up and Year End	Michelle Long	06/20/2022	1:20 pm – 3:00 pm	Want to save time cleaning up mistakes in QuickBooks Online? Do you know all the great tools & features in QuickBooks Online Accountant to help improve the accuracy of the data (5 times more accurate)? Then, this session is for you! I will demo the tools and features in QuickBooks Online Accountant to help save time on clean up and at year end. Specifically: Reclassify transactions, Books Review and fixing Undeposited Funds, Prepare 1099s and Prep for Taxes.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Monday – 1:20 – 3:00 PM

Session Name	Instructor	Date	Time	Description	Additional Information
QuickBooks Enterprise Advanced Inventory Part 1	Mario Nowogrodzki	06/20/2022	1:20 pm – 3:00 pm	This is part one of a two-part series. QuickBooks Enterprise Solutions offers an Intuit-developed add-on application called "Advanced Inventory" that includes multi-location tracking, serial number tracking or lot tracking, and FIFO inventory valuation	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0
Top 10 QuickBooks Tricks and Workarounds	Robin Hall	06/20/2022	1:20 pm – 3:00 pm	Learn how to help your clients maximize the performance for QuickBooks, not just the program itself but key reports in finding and helping reduce user issues.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Monday – 1:20 – 3:00 PM

Session Name	Instructor	Date	Time	Description	Additional Information
The Power of Rejection	Jia Jiang	06/20/2022	1:20 pm – 3:00 pm	Based on his #1 bestselling book, *Rejection Proof*, this workshop takes a deep dive into rejection-proof principles to expose attendees to techniques in overcoming fears. The audience will learn to turn rejection into an advantage, how to give rejections, and to get more acceptances. They will also go through "Rejection in the Wild", an unforgettable, real-life rejection-seeking exercise.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Personal Development CPE Hours: 2 EA/AFSP CE Hours: 0

Monday – 1:20 – 3:00 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Leap Forward with Xero	Jay Kimelman	06/20/2022	1:20 pm – 3:00 pm	Whether you're a new firm or existing firm looking to grow and thrive – you need a plan. This presentation touches on how to best choose your path. It then helps you develop the tools to make that path a reality. This holistic view of cloud technology, marketing, goal setting and success measurement can help any firm take a step toward its future.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0
AccountingSuite Core Certification	Ted McCrae	06/20/2022	1:20 pm – 3:00 pm	The AccountingSuite™ CORE training and certification program was created to provide our partners with a robust platform to learn all of the powerful features in AccountingSuite™. It not only gets you comfortable with the product but makes you an AccountingSuite™ RockStar to establish domain expertise with your clients.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Monday – 1:20 – 3:00 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Pivoting to, and Pricing, Your New Subscription Business Model	Ron Baker	06/20/2022	1:20 pm – 3:00 pm	McKinsey reports that the subscription e-commerce market has grown by more than 100% per year for past seven years. Further, subscription-based companies are growing eight times faster than the S&P 500 Index. In five years, we will have the option to subscribe to almost everything, and your firm will have to confront that fact, whether or not you transition to a subscription-based model. This session will teach you what is involved in pivoting to this new business model.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0
Tricky Transactions - Keep the Data in the Data File	Megan Genest Tarnow	06/20/2022	1:20 pm – 3:00 pm	Learn how to capture information on tricky transactions and pull the information you need out of QB without relying on outside schedules. Items to be covered will include In-Kind Contributions, Prepaid Expenses, Vendor Refunds, and Deferred Revenue, among others.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Monday – 1:20 – 3:00 PM

Session Name	Instructor	Date	Time	Description	Additional Information
The Rules of Advisory Service	Mike Milan	06/20/2022	1:20 pm – 3:00 pm	With everyone rushing to add advisory services to their offering, many of us just don't know where to start and fear falling behind. Adding advisory services to your offering is a huge undertaking and sometimes requires learning a whole new skill. Let's not forget that business owners have an expectation of what you do and need to be persuaded to trust this new direction. It's new, it's scary, it's unknown. This session takes some of the stress out of working with your clients by giving you a set of rules to live by. Rules keep us focused. Rules help us understand objectives and rules give you direction. Join Cash Flow Mike, serial entrepreneur, to learn the RULES to make your advisory services successful.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0

Monday – 1:20 – 3:00 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Try Before You Buy - Test Drive New Clients via Profitable Clean-up Jobs, Using the Client Experience 2.0 Method	Michelle Vilms	06/20/2022	1:20 pm – 3:00 pm	It's disconcerting to take on a new client and realize they are simply a bad fit. One of the best ways to ensure this doesn't happen is to "test drive" your prospective new clients! Client clean-up projects can be a wonderful way to not only get paid for your work and provide a much-needed service but also to allow you to gain valuable insights into how the client works. There is also a huge demand for this service, as small business owners need your help in getting their books accurate so they can file their taxes and manage their businesses properly. They may have been "going it alone" to save money and now they can't trust their balances. Or they may be a referral from a CPA firm who asks you to clean up and verify the balances so they can proceed with the tax return. Either way, you need a process to manage this work that results in a great experience for your staff, and for the client. You'll also benefit from a new way of looking at these projects - they can not only be profitable and enjoyable, they can also be a source of long-term clients as well. The biggest benefit of approaching client cleanup projects this way is that you will gain clients with clean books, and also know that they are not only easy to work with but they value your expertise and are willing to pay for it as well.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0

Monday – 1:20 – 3:00 PM

Session Name	Instructor	Date	Time	Description	Additional Information
The Evolution of Preaccounting: How Technology Has Abolished the Daily Grind	Phong Le Victoria O'Leary	06/20/2022	1:20 pm – 3:00 pm	This session explores the history and evolution of preaccounting and how technology has and will continue to transform formerly tedious and mundane tasks. But what does this future look like and how will those changes affect your day-to-day?	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0

Monday – 5:30 – 6:20 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Extending Excel with Power Query	Ernest Cook	06/20/2022	5:30 pm – 6:20 pm	This session demonstrates basic Power Query techniques that will enhance your everyday use of Microsoft Excel. While covering the basics, we'll show you how to build a repeatable process for transforming the information into a form you can use in other applications or combine data in ways that can't be done in other tools.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0
Introduction to Spreadsheet Sync	Dan DeLong	06/20/2022	5:30 pm – 6:20 pm	This new included add on in QBO Advanced brings many of the "I wish I could do this in QBO like in Desktop" into the realm of possibilities. Editing multiple list elements, batch updating invoices, combining reports for multiple companies all within the "magic of Excel" could just be Geek Paradise. This session will be an overview of how to connect and use this powerful tool.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0

Monday – 5:30 – 6:20 PM

Session Name	Instructor	Date	Time	Description	Additional Information
QuickBooks Desktop Migration – Part 1, Simple Conversions	MB Raimondi	06/20/2022	5:30 pm – 6:20 pm	Many of our clients want to switch from QuickBooks Desktop to QuickBooks Online. Hopefully they will turn to us for help. Even if they don't, if they have problems with the conversion, they'll turn to us. That means, we need to understand the conversion process. In this session we will cover a conversion for a service-based business. Content will include: what needs to be done before the conversion, how to convert a QuickBooks Desktop file to QuickBooks Online and what needs to be done after the conversion	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0
Training Your Clients on QuickBooks Online	Deborah Defer	06/20/2022	5:30 pm – 6:20 pm	The crawl, walk, run approach to training clients. Step by Step demonstration on how to train a client with QuickBooks Online. Setting expectations with a client when they are brand new to QBO. Helping clients help themselves. Understanding the client needs and what they want to be responsible for and what your role is critical to the success of a long-term relationship. Best Practices will be shared when bringing a client alongside of you with the monthly work.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0

Monday – 5:30 – 6:20 PM

Session Name	Instructor	Date	Time	Description	Additional Information
QuickBooks Enterprise Advanced Inventory Part 2	Mario Nowogrodzki	06/20/2022	5:30 pm – 6:20 pm	This is part two of a two-part series. QuickBooks Enterprise Solutions offers an Intuit-developed add-on application called "Advanced Inventory" that includes multi-location tracking, serial number tracking or lot tracking, and FIFO inventory valuation.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0
AccountingSuite Inventory Basics	Ted McRae	06/20/2022	5:30 pm – 6:20 pm	This class covers the basic inventory concepts in AccountingSuite™. Topics covered include items, lots and serial numbers, back-ordering, multi-location, costs, and reporting. Participants should have taken Core Certification before taking this class.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0

Monday – 5:30 – 6:20 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Staffing Challenges: Exploring and Vetting Outsourced Options	Joe Manzelli	06/20/2022	5:30 pm – 6:20 pm	This course will discuss the staffing challenges facing accounting and bookkeeping firms today and how many are looking to outsourced options as a way of fulfilling those needs. We will discuss the vetting process of outsourced options.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 1 EA/AFSP CE Hours: 0
Implementing the Key Elements That Separate Thriving Businesses From Those that Fail	Vanessa Vasquez	06/20/2022	5:30 pm – 6:20 pm	Nobody said that it is easy to have a business and survive, nevertheless, to thrive. But it seems that nobody got the memo. According to the Census Bureau, more than 4.4 million new businesses were created in the U.S. during 2020 — the highest total on record. That's a whopping 74 percent more than in 2019. With that said, let's learn what are the key elements of sustainability and growth. What does it take to not just start a business, but keep it energized for ongoing growth and success?	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 1 EA/AFSP CE Hours: 0

Monday – 5:30 – 6:20 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Coaching Your Clients to Masterful Management	Patricia Hendrix	06/20/2022	5:30 pm – 6:20 pm	Management coaching empowers businesses to form effective teams, enhance employee performance, foster accountability, and build distinctive company culture. In this class you'll learn 5 key management & leadership strategies that when embraced will lead to a high functioning busiteness.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 1 EA/AFSP CE Hours: 0
Client (and Firm!) Experience 2.0 – What is it and How Does Your Firm Stack Up?	Lynda Artesani	06/20/2022	5:30 pm – 6:20 pm	Firms pride themselves on providing great outcomes for their clients and with the move to advisory and the rise of technology and apps, you are making more of a difference than ever for your clients' continued success and growth. But have you ever thought about what your clients' *experience* is when working with your firm? And how that experience directly impacts YOUR experience as well? This course will cover the principles involved and benefits that accrue when a firm creates a top-notch experience for their clients at every touch point. You'll also assess your current Client Experience Level and leave with a practical action plan to help your firm step up to CX 2.0.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 1 EA/AFSP CE Hours: 0

Scaling New Heights®

#SNH22

Tuesday, June 21

Tuesday – 7:45 – 8:45 AM

Session Name	Instructor	Date	Time	Description	Additional Information
Innovation Beyond Technology	Ed Kless	06/21/2022	7:45 am – 8:45 am	This session is dedicated to the possibility that innovation goes beyond just technological developments. Technology is important, but it is only a small part of innovation. For innovation to be more fully complete we must look at other areas including the internal processes of the organization and most importantly the very language we use. Innovating like this is hard work and not for everyone because it requires deeper thinking than is most often thought. If you believe you can attain this level of thinking, you are invited to attend this session facilitated by Ed Kless, Sage senior director of partner development and strategy.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 1 EA/AFSP CE Hours: 0
Stand Out: Find Your Differentiator in a World of "Same"	Heather Hurst	06/21/2022	7:45 am – 8:45 am	In the throes of tax season, it can be hard to think about standing out; you're just trying to keep your head above water. But scaling your firm demands that you differentiate and find your niche as you build your brand year-round. In this session, we will discuss ways to identify what makes you stand out from the competition, and how to weave your differentiators into a brand strategy to grow your firm and let it thrive.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 1 EA/AFSP CE Hours: 0

Tuesday – 7:45 – 8:45 AM

Session Name	Instructor	Date	Time	Description	Additional Information
FP&A, A Silver Bullet in Providing Insights and Guidance When Offering Client Advisory Services	Matthew West	06/21/2022	7:45 am – 8:45 am	The use of data and analytics continues to grow in firms offering Client Advisory Services. Many firms are helping clients make sense of their financial footprint through KPIs, forecasts, and budget trends. In this session, learn how to position FP&A services, standardize deliverable financial statement data, and deepen the advisory engagement with your client.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 1 EA/AFSP CE Hours: 0
Adding Value to Your Practice	Val Steed	06/21/2022	7:45 am – 8:45 am	Join Val Steed as he discusses how you can add value to your practice.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Applications CPE Hours: 1 EA/AFSP CE Hours: 0

Tuesday – 7:45 – 8:45 AM

Session Name	Instructor	Date	Time	Description	Additional Information
Advanced Melio Tips and Tricks	Kelly Moore	06/21/2022	7:45 am – 8:45 am	Join Melio Team members as they go deep into some of the advanced features of Melio.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0
How to Ignite Your Client Engagement Strategy for 2022	Joshua Lance	06/21/2022	7:45 am – 8:45 am	The shift to a digital-first business has sparked new ways of engaging with clients. Whether you're an accounting professional, agency, or consultant, professional services that adopt a new hybrid approach to client engagement are the ones who will remain competitive and scale in 2022.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 1 EA/AFSP CE Hours: 0

Tuesday – 7:45 – 8:45 AM

Session Name	Instructor	Date	Time	Description	Additional Information
Managing Risk According to the IRS 4557 Cyber Security Guidelines for Accountants	Jamie Beresford	06/21/2022	7:45 am – 8:45 am	Protecting client data is not only good business, it is the law. The IRS released a comprehensive guide on safeguarding your business, but what do these guidelines mean and how can leaders like yourself understand and put these guidelines into place? In this Power Breakfast session, Jamie Beresford, CEO and Jon Melloy of Practice Protect will break down the IRS 4557 guidelines and demonstrate how cyber security touches all parts of your business. With a holistic approach to your technology, team and compliance, Jamie will show you how it is very achievable to meet the guidelines and protect your business from cyber threats. This session aims to unpack cyber security in laymen's terms, enabling CPAs to secure their firms with confidence.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Information Technology CPE Hours: 1 EA/AFSP CE Hours: 0
The Expensify Card: Fully Automated Expense Reporting	Cheryl Walsh	06/21/2022	7:45 am – 8:45 am	Expensify removes the hassles of expense reporting so you can get back to the important things. As a trusted partner of AICPA with thousands of mutual QuickBooks customers, Expensify automates the entire expense reporting process and synchronizes it with all the major accounting software including QuickBooks Online.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0

Tuesday – 7:45 – 8:45 AM

Session Name	Instructor	Date	Time	Description	Additional Information
The First 24: Aftermath of Ransomware	BJ O'Reilly	06/21/2022	7:45 am – 8:45 am	Hackers are largely indiscriminate. While you may hear about large companies suffering breaches, smaller companies are more frequently attacked and make easier targets due to their lack of cybersecurity resources. In this session, we will cover what a Ransomware attack looks like in real life from the initial breach to the remediation and beyond. Learn about the crucial tasks and responsibilities of cyber security and how to protect yourself.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Information Technology CPE Hours: 1 EA/AFSP CE Hours: 0

Tuesday – 1:20 – 3:00 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Getting to Really Know Excel - Real Work, Real Solutions!	Norman Axelman	06/21/2022	1:20 pm – 3:00 pm	There truly is a blur when it comes to describing, "Basic, Intermediate and Advanced" when referring to work with Excel spreadsheets. What many may think is "basic" can really make one an "advanced" user, and what many think is, "advanced" is oftentimes pretty basic. Ultimately, the goal is to just get our work done the best possible way. Using real-life "case studies" we will demonstrate some of the special features and formulas in Excel to get work done the best way!	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Tuesday – 1:20 – 3:00 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Pax8's Guide to Expanding Your Practice with SaaS Management	Jennifer Evans	06/21/2022	1:20 pm – 3:00 pm	As your client's transition to cloud technology, Pax8 unlocks an additional revenue stream for advisors with an online marketplace for you quote, order, bill, and provision software services. Learn how to build a software stack that every business needs including QuickBooks Online, Microsoft's Modern Office, and AirSlate SignNow a digital signature technology. As an advisor, participating in your client's digital transformation creates cost savings, organizational visibility, and ultimately improved business efficiency.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0
Job Costing with QuickBooks Online	MB Raimondi	06/21/2022	1:20 pm – 3:00 pm	Many clients want to be able to track revenue and expenses by job. Your challenge is to determine what are the clients' needs and wants and figure out how to make it happen in QuickBooks Online. This session will cover the following: job costing setup, tracking projected revenue/costs by jobs, tracking costs, tracking direct labor, invoicing and job cost reports.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Tuesday – 1:20 – 3:00 PM

Session Name	Instructor	Date	Time	Description	Additional Information
QuickBooks Desktop Enterprise with Work In Process	Carla Demers	06/21/2022	1:20 pm – 3:00 pm	This session will show attendees how to use QuickBooks job cost reports to transfer information to an Excel WIP schedule. We will review QuickBooks setup to enable information to be readily transferred to an Excel Work in Process Spreadsheet.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0
Taking on a Massive QBO Cleanup With Confidence	Veronica Wasek	06/21/2022	1:20 pm – 3:00 pm	Looking at a client's messy books can feel like running in an obstacle race. You have no idea what you're looking at and you're completely overwhelmed. In this session, we'll trade overwhelm and uncertainty for a confident, reliable system for taking on the messiest QBO cleanups.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Tuesday – 1:20 – 3:00 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Selling Your Brain: Creating Access-Level Agreements	Ed Kless	06/21/2022	1:20 pm – 3:00 pm	This session is dedicated to the possibility that a professional firm will be more effective for its customers if it begins to sell not hours or service, but access to the brains of the professionals. Creating access level agreements is hard work and not for everyone because it requires professionals to think differently than they have in the past about what it is they really do and sell. If you think you have what it takes to make this shift or are just curious about it, you are hereby invited to open a dialogue about how best to alter this language by Ed Kless, Sage's senior director of partner development and strategy, who will facilitate this session.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0

Tuesday – 1:20 – 3:00 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Client Experience 2.0 in Action - Liscio Training for Firm Users	Rob Smith Emily Schnaidt	06/22/2022	1:30 pm – 3:10 pm	This course is ideal for any firm that is considering Liscio, or is already using it to power an outstanding Client and Firm Experience. In the first 50 minutes, the instructor will walk through common use cases that require multiple tools and create confusion and wasted time for staff, and then will show how Liscio solves them elegantly and quickly. In the second half of the session, we will kick into high gear and show some of the advanced capabilities of Liscio including how to create any fillable form you need, how to create and send hundreds of engagement letters with just a few clicks, how to manage high volumes of incoming client documents so that everyone can find what they need without wasting time, best practices for managing client-facing tasks, and more.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Tuesday – 1:20 – 3:00 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Building Transformative Communities	Mariette Martinez	06/21/2022	1:20 pm – 3:00 pm	Join our Interactive session where we will connect and learn from the accounting leaders (our colleagues) who created transformative communities that help us reach new heights in our personal and professional lives and thrive in our goals and dreams. Speaking about Leveling Up our business is very different from actually doing what it takes to Level Up and Scale. Most times, collaborating with our like-minded peers is the secret sauce to help us step into the next best version of ourselves and our businesses. Let's pull back the curtains and hear from the leaders in our space who want to share with us the real deal on setting goals, reaching our dreams, and more importantly, reaching new heights alongside one another in our businesses. "A rising tide lifts all boats."	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Personal Development CPE Hours: 2 EA/AFSP CE Hours: 0

Tuesday – 1:20 – 3:00 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Manage High Performing Virtual Teams	Tate Henshaw	06/21/2022	1:20 pm – 3:00 pm	It can be challenging to build a high-performance team that effectively balances the demands of productivity and collaboration with the bottom line. This is especially true now as we all navigate a new, digital-first operating context where remote work is a given. Get practical insights on how to best lead and empower your team in a virtual setting.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0
Excellence is a Choice – Embracing the "Now Normal"	Kaplan Mobray	06/21/2022	1:20 pm – 3:00 pm	The hybrid, current, and post pandemic world will be driven by a new normal. Your ability to create new, innovative, and often unconventional ways to lead others, drive growth, inspire new learning, solve immediate problems, and deliver new results will shape your personal growth and the health of your career in the years ahead. But without embracing your "Now Normal", you may find yourself unprepared to meet the unpredictable demands of today's changing landscape. So are you prepared to embrace your excellence, change agility, resilience and uncertainty as a new normal for growth? What is your "Now Normal"? What is your "Now Mindset"? What Makes You Indispensable to your teams, your organization, your clients, and stakeholders? And what steps will you take to seize amazing opportunities and create new value from what you do? This interactive, thought-provoking, insightful, and engaging presentation celebrates the power of leadership excellence, change agility, and the transformation that comes with being intentional about personal and professional growth.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0

Tuesday – 5:30 – 6:20 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Introduction to Power BI	Ernest Cook	06/21/2022	5:30 pm – 6:20 pm	During this session we walk through all the considerations and steps to go from data to dashboard with Power BI. In addition to dials on dashboards, we discuss how critical a good data model is and provide some recommendations for that. We also will show attendees how you can also leverage data stored in Power BI to give full financial statements with Power BI's tabular reporting and analyze your financials using Excel.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0
Introduction to Power Automate	Heather Satterley	06/21/2022	5:30 pm – 6:20 pm	Join automation expert, Heather Satterley, as you explore Microsoft's Power Automate platform. In this session, Heather will cover the basics of Power Automate, how to navigate the platform, and ways to leverage templates to create cloud-based Flows without knowing any code. You'll also learn how to build your first basic Flow so you can begin automating repetitive processes and free up your time.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0

Tuesday – 5:30 – 6:20 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Construction Job Costing with QuickBooks Enterprise	Tonya Schulte	06/21/2022	5:30 pm – 6:20 pm	Does it seem like every time you turn around, you are getting a new notice from Intuit about ANOTHER program change that affects the bottom line of your business? Last year it was a big financial hit to the QBO Wholesale Billing Program and ending the very popular IOP4A: Intuit's stand-alone Online Payroll. Both of these were nice income streams for participating ProAdvisors. This year they ended the Desktop Enhanced Payroll for Accountants subscription. We will discuss ways to weather these inevitable changes so you can thrive too!	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0
QuickBooks Desktop Migration Part 2, Advanced Conversions	MB Raimondi	06/21/2022	5:30 pm – 6:20 pm	Migrating a QuickBooks Desktop file to QuickBooks Online is a little more challenging with advanced features, such as inventory, payroll and sales tax, that are used in the Desktop file. This session will cover the following with advanced QuickBooks Desktop companies: what needs to be done before the conversion, how to convert a QuickBooks Desktop file to QuickBooks Online and what needs to be done after the conversion	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0

Tuesday – 5:30 – 6:20 PM

Session Name	Instructor	Date	Time	Description	Additional Information
How to THRIVE When Intuit Makes Big Changes That Affect You	Carrie Kahn	06/21/2022	5:30 pm – 6:20 pm	There are many ways you can make more money as a QuickBooks ProAdvisor you may not have considered. With the vast array of offerings, many ProAdvisors do not know whether to focus on QuickBooks Online or QuickBooks Desktop. They are often bombarded with updates and feel they never have enough time to learn the best options for their clients. During this session, we will discuss building partnerships to solve the problem, and then we will share with you how to leverage them.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 1 EA/AFSP CE Hours: 0
How to Get Your Groove Back So You and Your Team Can Thrive	Chris Farrell	06/21/2022	5:30 pm – 6:20 pm	This session is designed to help practitioners from all firm sizes to shift how they spend their time so that joy and daily job satisfaction becomes the norm, instead of stress, long hours, and frustration. Taught by Chris Farrell, CPA, this session will uncover the key reasons why everyone is so stressed out right now (spoiler alert - it's not what you think!), then present actionable things that firm owners and partners can do to leverage their time. The end result will be that you'll create an environment where you and your team can thrive and everyone can do the best, most satisfying, and yes, FUN, work of their lives. Bring your open minds and sincere desire to make 2022 your best year yet, with more awesome years ahead, each building on the last.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 1 EA/AFSP CE Hours: 0

Tuesday – 5:30 – 6:20 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Our Tech Stack and Why It Works - Leverage Your Technology for Productivity & Growth	Kathy Dise	06/21/2022	5:30 pm – 6:20 pm	Review the BudgetEase Tech Stack to help newer bookkeepers choose software and apps in a confusing ecosystem. This is not a course listing all the possible technologies. Only the apps we have thoroughly vetted will be shared and discussed. We will cover what we like and don't like, why we chose it and what would make it better. For example, we use Microsoft - Planner, OneNote, Forms, Outlook, Whiteboard, and Teams. In addition to QuickBooks, Bill.com, Melio, Right Networks, QBox, Ebillity, QB Payroll, Invoice Sherpa, Expensify, Fathom, Cash Flow Tool, Qvinci, and more.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basix Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0
How To Authentically Attract Ideal Customers Without Spending a Ton of Time or Money	Kenny Harper	06/21/2022	5:30 pm – 6:20 pm	Many accountants are overwhelmed by all the various things they have been told they need to do in order to gain more ideal customers. However, there is a better way, and it doesn't require creating a ton of content or spending a lot on advertising. This presentation provides a simple framework and easy-to-implement actions to generate consistent and predictable results without spending a ton of time or money.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Communication & Marketing CPE Hours: 1 EA/AFSP CE Hours: 0

Tuesday – 5:30 – 6:20 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Stop Overworking: The Magic of Having More by Doing Less	Erin Daiber	06/21/2022	5:30 pm – 6:20 pm	You've mastered the art of getting things done. But at what cost? You may still be experiencing high levels of stress, worry, fatigue, and find less and less enjoyment from getting things done. If you're ready to let go of busyness, exhaustion, and frustration without sacrificing your profits, this is the course for you. Overworking comes at the expense of your joy, balance, profits, and growth. From here, everything is complicated and the things you really want in life seem out of reach. You're likely missing opportunities to provide excellent client service, grow your business, and step into the next level. What if we could unlock new levels of results in your business and your life by doing less? Would you be interested? Join us in this session to start the journey.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Personal Development CPE Hours: 1 EA/AFSP CE Hours: 0

Tuesday – 5:30 – 6:20 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Those Tricky Small Business Expenses and How to Document and Deduct Them	Pam Greene	06/21/2022	5:30 pm – 6:20 pm	Understanding what is necessary documentation for the most questioned small business expenses.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 1 EA/AFSP CE Hours: 0
Communicate Using Stories to Move Your Client to Success	Debra Kilsheimer	06/21/2022	5:30 pm – 6:20 pm	As accountants, we deal in data. We love that! But to effectively interact with clients, we need to become storytellers. This class will show you have to convert the data to stories your clients will understand.	Length (in minutes): 50 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Personal Development CPE Hours: 1 EA/AFSP CE Hours: 0

Scaling New Heights®

#SNH22

Wednesday, June 22

Wednesday – 7:45 – 8:45 AM

Session Name	Instructor	Date	Time	Description	Additional Information
Ten Technology Security Mistakes You Are Making Right Now	Daniel Moshe	06/22/2022	7:45 am – 8:45 am	Learn about simple steps you can take to secure your firm and be more resilient from both internal and external threats.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Information Technology CPE Hours: 1 EA/AFSP CE Hours: 0
Simplifying Sales Tax Management for QuickBooks Online	Jake Sullivan	06/22/2022	7:45 am – 8:45 am	Learn how your business can harness the power of a comprehensive sales tax engine while leveraging your existing QuickBooks Online solution. Partnering with SOVOS positions your business for growth with a solution that ensures your tax compliance needs are met whether you do business in five states or all 50. Attend this session to see how you can streamline and simplify sales and use tax compliance with an out-of-the-box integration.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0

Wednesday – 7:45 – 8:45 AM

Session Name	Instructor	Date	Time	Description	Additional Information
Marketing Your Practice in 2022	Tate Henshaw	06/22/2022	7:45 am – 8:45 am	Marketing your practice is an all-year activity. This session shows how to create an ideal client profile that positively impacts your marketing strategies. You'll also learn some steps to take when creating a marketing plan, as well as things you can do immediately to start attracting clients.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Communication & Marketing CPE Hours: 1 EA/AFSP CE Hours: 0
Ecommerce Accounting in a Post-Covid World	Jason Richelson	06/22/2022	7:45 am – 8:45 am	During 2020 and 2021 we saw what happened when everyone was forced to conduct business virtually and we accountants had to figure out how to deal with it at year's end. More and more of our business and personal life is continuing to go online. We all need to be more clear on how to handle ecommerce, efficiently and correctly, in accounting. Now that everything is ecommerce, what does this mean for you and your business?	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0

Wednesday – 7:45 – 8:45 AM

Session Name	Instructor	Date	Time	Description	Additional Information
Grow Your Revenue and Optimize Recoverability with Dext	Hussein Hamir Michael Ciers	06/22/2022	7:45 am – 8:45 am	Never turn another client away, with Dext Prepare and Dext Commerce. In this session, we'll teach you how you can standardize your processes to ensure consistency and profitably across your client base. We'll also show you the best way to engage your clients so that you receive all the data and documents you need so you're always audit-ready. Go from reactive to proactive, with Dext Prepare and Dext Commerce.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0
Automation and the Transformation of Bill Pay	Bob Lewis	06/22/2022	7:45 am – 8:45 am	Have you transformed spend management for your clients yet? The future of Accounts Payable has arrived with the industry-leading Bill Pay 2.0 capabilities of Corpay One. Serve your clients better and faster with intelligent automation, spend less with our advisor friendly pricing model, and help your clients achieve their financial business goals with the Corpay Mastercard®	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0

Wednesday – 7:45 – 8:45 AM

Session Name	Instructor	Date	Time	Description	Additional Information
Bill.com Certification & Product Tour	Brandon Roth	06/22/2022	7:45 am – 8:45 am	Join Brandon Roth, Senior Manager of Technical Marketing, for this exclusive, live certification session of Bill.com. We'll cover the importance of A.I./automation, separation of duties, how to standardize and create efficiency in AP, and much more. Bill.com is a leading provider of cloud-based software that simplifies, digitizes, and automates complex, back-office financial operations for small and midsize businesses. Customers use the Bill.com platform to manage end-to-end financial workflows and to process payments. The Bill.com AI-enabled, financial software platform creates connections between businesses and their suppliers and clients.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0
How to Optimize Your Accounting Firm with Mango	Tim Sines	06/22/2022	7:45 am – 8:45 am	Every accounting firm wants its practice management process and software buttoned up and bulletproof, but there are common inefficiencies that slowly bring down even the best firm if they're not addressed. Now is the time to move to new software and feel confident you'll be like Superman. Hundreds of firms in the last 12 months have chosen Mango for their practice management needs and there's a buzz in the industry about the revolutionary way Mango helps accounting firms run more efficiently and earn higher profits.	Length (in minutes): 60 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 1 EA/AFSP CE Hours: 0

Wednesday – 1:30 – 3:10 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Augment your QBO practice with PowerBI – Hands-On Lab	Tyler Stromberg	06/22/2022	1:30 pm – 3:10 pm	Data is the most valuable and vulnerable asset of the modern business world. Businesses of every size are generating huge volumes of data every day – data that needs to be properly organized, managed, and interpreted for decision making. Today's businesses need help combining traditional financial data, which are lagging indicators, with other leading indicators of business. Let's explore some simple strategies to use PowerBI as your analytics tool to offer dash-boarding as a service to enhance the value of your monthly pricing.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0
How I Saved My CAS Practice - Our Journey to the Cloud	Sara Laidlaw Woodruff	06/22/2022	1:30 pm – 3:10 pm	I thought I was prepared, but then COVID almost killed a key employee. Learn how we used MS Teams/SharePoint, OneNote, and Click Up to survive.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Wednesday – 1:30 – 3:10 PM

Session Name	Instructor	Date	Time	Description	Additional Information
QuickBooks Desktop File Utilities	Dan DeLong	06/22/2022	1:30 pm – 3:10 pm	Have you ever seen a Balance Sheet out of Balance? How about editing a transaction and QuickBooks Desktop closes on you, that is great, huh? Anytime you say "weird" and QuickBooks" in the same sentence, usually you are talking about data damage. This session will focus on some of the common causes of data damage, and ways to remedy it so you and your clients can be confident working in, and that the data will create the reports that help guide making decisions affecting you and your client's businesses.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0
Non-Standard Transactions in QuickBooks Online	Michelle Long MB Raimondi	06/22/2022	1:30 pm – 3:10 pm	Some transactions seem to be difficult to determine how to enter them into QuickBooks. In this session, we'll discuss and demonstrate how to enter tricky transactions. Specifically: options for retainers / deposits, daily sales summary, bounced checks, credit cards with multiple cards, write off invoices, record donated inventory, trading customer and vendor balances and how to record bank deposits when returns are greater than sales	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Wednesday – 1:30 – 3:10 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Troubleshooting QuickBooks Desktop Cash to Equity Part 1	Laura Madeira	06/22/2022	1:30 pm – 3:10 pm	In this two-part course, sharpen your QuickBooks troubleshooting skills using QuickBooks Accountant Desktop 2020. Have you ever experienced difficulty in troubleshooting or correcting your client's QuickBooks data entry errors? If you answered yes to this, then you will not want to miss this intensive two-part course. The methods taught will complement the features and tools available with QuickBooks Accountant 2020 Client Data Review. Case studies will be provided to you for your participation during the course to facilitate training based on actual client file issues. Leave this course more prepared to work accurately and efficiently with your clients' QuickBooks files.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic, Intermediate and some Advanced concepts Prerequisites: Knowledge of Quickbooks Desktop CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0
Idiosyncrasies of QuickBooks Online	Joe Aliota	06/22/2022	1:30 pm – 3:10 pm	QuickBooks Online is the present and future of QuickBooks. The accounting behind some of the features in QBO may surprise an unaware user or accounting professional. This class will identify those features and their accounting quirks, teach class participants what an accounting professional would expect, and bridge the gap by recommending best practices to ensure proper accounting is followed.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Wednesday – 1:30 – 3:10 PM

Session Name	Instructor	Date	Time	Description	Additional Information
How to Create an Exit and Succession Plan for Your Clients (and You!)	Peter Hickey	06/22/2022	1:30 pm – 3:10 pm	Exit & Succession planning is a great way to build a new income stream for your practice and is one of the fastest growing business advisory niches. We will demonstrate a "step by step" process on how you can create an exit and succession plan for your clients. We will discuss the great opportunity for accountants and bookkeepers to sell advisory work and how this fits within the comfort zone of most accountants and bookkeepers. We show you how you can work with your client to discuss the important question of when and how they intend to exit or sell their business. The session covers how to create a plan that includes 1. Maximizing the value of a business 2. Ensuring the business owner is personally and financially ready 3. Creating a "life after exit" plan	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0
Technology Advisory - Help Your Clients Succeed with Technology	Daniel Moshe	06/22/2022	1:30 pm – 3:10 pm	Learn all about the Technology Advisory practice and how it compliments your existing service offerings. You don't need to be a tech expert to be a Technology Advisor, but you can make a huge impact in your clients' organizations by being part of the technology conversation and helping them orchestrate the right resources to help them grow.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Information Technology CPE Hours: 2 EA/AFSP CE Hours: 0

Wednesday – 1:30 – 3:10 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Outstanding On-boarding Leads to Outstanding Clients - The Client Experience 2.0 Model	Katey Maddux	06/21/2022	1:20 pm – 3:00 pm	Ensuring that each client experiences your firm as a progressive, responsive firm is easier than you think. It hinges on having a world-class onboarding process that sets each new client up for success. AND - it starts before the client becomes a client! Come and learn tried and true best practices for setting the right tone, demonstrating your expertise, and ensuring that the relationship is on solid ground from the first touch point through the on-going engagement. This interactive course will walk you through the steps and phases that taken together, lead to successful onboarding in a practical and engaging way. Audience exercises will be included to deepen the experience and personalize it to your own practice.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0

Wednesday – 1:30 – 3:10 PM

Session Name	Instructor	Date	Time	Description	Additional Information
2022's Biggest Security and Privacy Concerns	Brian Tankersley	06/22/2022	1:30 pm – 3:10 pm	Technology is a business-critical business capability in today's day and age. Any interruption to an organization's ability to use its information system poses a significant risk to its viability. Data breaches, cyber-attacks, and ransomware are examples of the most significant existential risks facing businesses today. There are threat actors worldwide that entirely focus on stealing organizational data, stealing economic resources, and disrupting commerce. They use complex social engineering attacks, pervasive phishing messages, intricate malware, and other highly effective techniques. For example, publicly reported data breaches now exceed 100k annually. These breaches resulted in releasing the personal information of millions of people worldwide, billions of dollars of compromised organizational assets, and putting countless people in harm's way. This course covers recent major security breaches, including Solarwinds, Ubiquity, Colonial Pipeline, Tecnimont SpA, Citrix, and LabCorp. It will discuss how these breaches occurred, why they occurred, and how organizations can prevent similar incidents from impacting them. Each case study examines a different form of security vulnerability and how to avoid it. The topics will include social engineering, auditing processes for IT Security systems, forensic accounting, password, two-factor authentication, and improvements for managerial oversight. Participants will gain real-world knowledge from the mistakes of other organizations and, from that experience, develop their own security best practices for their organizations.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Information Technology CPE Hours: 2 EA/AFSP CE Hours: 0

Wednesday – 1:30 – 3:10 PM

Session Name	Instructor	Date	Time	Description	Additional Information
Expensify's Advertising Experts Share Their Wisdom & Knowledge	Monte Barnard Matt Allan	06/22/2022	1:30 pm – 3:10 pm	Learn the tricks of the trade from Expensify's advertising and marketing experts and find out how you can market and promote your small business without a million-dollar budget.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Communication & Marketing CPE Hours: 2 EA/AFSP CE Hours: 0

Wednesday – 4:10 – 5:50PM

Session Name	Instructor	Date	Time	Description	Additional Information
The Death of Email: 21st Century Collaboration with MS Teams	Brittany Brown	06/22/2022	4:10 pm – 5:50 pm	Session Description Coming Soon	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Wednesday – 4:10 – 5:50PM

Session Name	Instructor	Date	Time	Description	Additional Information
Cash vs Accrual Basis Accounting in QB Desktop and QBO – Recognizing the Differences and Idiosyncrasies	Joe Aliota	06/22/2022	4:10 pm – 5:50 pm	Both QuickBooks Desktop (QBDT) and QBO include the ability to generate reports on either cash or accrual basis. While cash basis reports essentially eliminate accounts receivable and payable from those reports in both QBDT and QBO, there are circumstances when this is not the case. Additionally, there are considerable differences between the how each software handles the elimination. Let's explore those differences and how some transactions aren't eliminated, and how some reports don't include transactions that one might expect would be included.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0
Tips for Setting up & Customizing QuickBooks Online	Michelle Long	06/22/2022	4:10 pm – 5:50 pm	Would you like to learn what to do after converting a QuickBooks desktop company to QuickBooks Online (QBO)? Or how to start a new QBO company without converting? Then this session is for you! I'll demo and we'll discuss: importing lists, custom chart of accounts, beginning / opening balances, steps after conversion, customization tips and more.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Wednesday – 4:10 – 5:50PM

Session Name	Instructor	Date	Time	Description	Additional Information
Troubleshooting QuickBooks Desktop Cash to Equity Part 2	Laura Madeira	06/22/2022	4:10 pm – 5:50 pm	In this two-part course, sharpen your QuickBooks troubleshooting skills using QuickBooks Accountant Desktop 2020. Have you ever experienced difficulty in troubleshooting or correcting your client's QuickBooks data entry errors? If you answered yes to this, then you will not want to miss this intensive two-part course. The methods taught will complement the features and tools available with QuickBooks Accountant 2020 Client Data Review. Case studies will be provided to you for your participation during the course to facilitate training based on actual client file issues. Leave this course more prepared to work accurately and efficiently with your clients' QuickBooks files.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic, Intermediate and some Advanced concepts Prerequisites: Knowledge of Quickbooks Desktop CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0
Essential Financial Measurements	Fred Parrish	06/22/2022	4:10 pm – 5:50 pm	Session Description Coming Soon.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0

Wednesday – 4:10 – 5:50PM

Session Name	Instructor	Date	Time	Description	Additional Information
Supercharge Your Firm's 1040 Data Gathering and Utilization Processes	Rob Smith	06/22/2022	4:10 pm – 5:50 pm	For tax pros it's all about efficiency. You've got great tax software in place to help get those tax returns done. You've notified clients of your deadlines. But then clients drag their heels sending their documents in, and when you do get them, it is time-consuming to organize and summarize what they've sent you. Did clients send everything you asked for? What's missing? It's vital you have a crystal-clear process that ensures you get the right documents from clients, that they are sent securely and on a timely basis, and that you can easily summarize and annotate them so your tax staff can input them efficiently. Rob Smith will share best practices to create a process that ensures that once each client's 1040 document set is sent to the tax team, it's complete, accurate, and leads to total efficiency. The software he will use to demonstrate this process is Microsoft 365 (Teams, SharePoint and OneNote) and he will touch on using Liscio to ensure you get clients to send their documents on time. If your firm uses inexperienced or seasonal tax staff, or you simply want to learn new ways to gather, track, and layout your tax documents efficiently, this course is for you.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Computer Software & Application CPE Hours: 2 EA/AFSP CE Hours: 0

Wednesday – 4:10 – 5:50PM

Session Name	Instructor	Date	Time	Description	Additional Information
The 3 Critical Steps for Building an Advisory Practice	Sean Duncan	06/22/2022	4:10 pm – 5:50 pm	In this session you'll learn the 3 key steps for starting an advisory practice that will thrive. Your presenter will provide you with his personal methodology for planning for and implementing advisory services into a firm. He'll provide conceptual, practical, and actual considerations that are essential to anyone considering a complete transition to advisory or as additional revenue to an existing practice.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0
Challenging Our Thinking: Breaking Through to New Levels of Learning and Implementation	Ingrid Edstrom	06/22/2022	4:10 pm – 5:50 pm	This is an amazing opportunity to discuss and apply the ideas you have been picking up this week at Scaling New Heights. Some of these ideas may be new and even intimidating, and we want to make sure that you have the tools to move forward in applying them in your practice. Join several SNH instructors for an interactive, discussion-based brainstorming session focusing on the changes in our industry. Together we will challenge our assumptions, ask the deep questions that lead to more questions, and create new learning opportunities based upon the experience of all participants. This will be a supportive facilitated discussion where all ideas are welcome. There will be time at the end for everyone to come back together, and the facilitators will report on the key breakthroughs of each group for the benefit of all.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Personal Development CPE Hours: 2 EA/AFSP CE Hours: 0

Wednesday – 4:10 – 5:50PM

Session Name	Instructor	Date	Time	Description	Additional Information
Winning Every Time: How Bookkeepers Succeed Fast	Gabrielle Fontaine	06/22/2022	4:10 pm – 5:50 pm	Imagine there's a way to only accept clients that value your services and are happy to pay your premium level fees. Imagine more easily resolving any sticky issues that come up with your existing clients as well as your team. Imagine making amazing strategic partner connections and working with cutting-edge thought leaders who could help you conquer any obstacles that stand in your way and grow your business faster than you ever thought possible. What would it feel like to have this ability? You don't have to imagine it. You can easily do it by using a simple yet extremely powerful method that is bullet proof. In this session you'll learn not only what this magic process is, but exactly how to immediately put it to work for you right at the conference! You'll see how you can win every time at reaching your goals, and at the same time, improve the lives of everyone you touch.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0

Wednesday – 4:10 – 5:50PM

Session Name	Instructor	Date	Time	Description	Additional Information
The Paperless Office	Brian Tankersley	06/22/2022	4:10 pm – 5:50 pm	Would you like to find important documents in 10 seconds or less? Would you like to ensure that all your digital information is safe and secure? Would you like to improve workflow efficiency? Of course, you would, and with a bit of planning and guidance, you will be on your way to realizing these and other benefits of a paperless office. Of course, no one expects a completely "paperless" office, but reducing the amount of paper we shuffle can offer tremendous rewards. This course will teach you best practices and proven processes for effective document management. Participating in this session will teach you how to implement simple, inexpensive document management systems at an individual, workgroup, or small business level. You will also learn about sophisticated and comprehensive document management systems appropriate for larger offices and organizations, including systems with automated workflow processing. Your instructor will guide you through issues such as digitizing paper files, exporting and importing data from specialized applications into a document management system, essential hardware and software considerations, and the policies necessary to facilitate a successful office. Upon completing this course, you will have a comprehensive understanding of your options and a clear direction for implementing your version of the Paperless Office.	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Information Technology CPE Hours: 2 EA/AFSP CE Hours: 0

Wednesday – 4:10 – 5:50PM

Session Name	Instructor	Date	Time	Description	Additional Information
How to BOSS IT in 2022 and Beyond	Carl Reader	06/22/2022	4:10 pm – 5:50 pm	From words, to action. Carl Reader will be taking the principles behind his morning keynote and working with you to create a personal action plan, in this intimate workshop setting. Be prepared to think, dream, contribute, and come away with a succinct plan to implement all the great things you've learned across the conference into your business. One not to be missed!	Length (in minutes): 100 Level (Basic, Intermediate, Advanced): Basic Prerequisites: None CPE Field of Study: Business Management & Organization CPE Hours: 2 EA/AFSP CE Hours: 0

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