

TOWN AND COUNTRY CONVENTION CENTER
HOTEL CIRCLE NORTH, SAN DIEGO, CALIFORNIA



The **NEW NORMAL** Begins Now

EVENT PROGRAM

7 HOURS of CONTINUING EDUCATION
including 6 hours of Accounting/Auditing

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A - Accounting and Auditing
T - Tax and other Technical
P - Professional Development
F - Fraud

Participating Organizations:

California Society of Certified Public Accountants – CalCPA
Institute of Management Accountants – IMA
San Diego Chapter
Institute of Management Accountants – IMA
North County Chapter
Asian Accountants of San Diego – AASD

American Society of Women Accountants – ASWA
Information Systems Audit and Control Association – ISACA
Institute of Internal Auditors – IIA
American Society of Military Comptrollers – ASMC

2010 Accounting Day Schedule

7:15-8:00 AM — Registration, Continental Breakfast, Visit Exhibits

8:00-8:10 AM — Welcome and Introduction – Jim Colville, Chairman

**8:10-9:00 AM — Keynote Address: “The Next Economy: Meaner, Leaner, Greener, Cleaner and Connected” –
Reo Carr - Editor-in-Chief – San Diego Business Journal**

**3
HOURS**

9:15-12:15 PM (3 hours) CONCURRENT WITH ALL MORNING SESSIONS

**San Diego
Room F**

Fraud and The Accounting Profession

Dana Basney MSBA, CPA, CFE, CIRA, CVA, ABV, CFF

What's the CPA's responsibility to find fraud, and how to go about? This informative (and entertaining) session is presented by Dana Basney who leads the Forensic Accounting Services Group for CBIZ Accounting, Tax & Advisory, LLC and Mayer Hoffman McCann PC.

9:15-10:05 AM CONCURRENT SESSIONS

Salon 1 A

What is Hot about the new COSO Monitoring Guidance for Internal Control Systems

Steve Austin CPA, MBA

Steve Austin, Managing Partner in San Diego for Swenson Advisors, LLP, will present a summary of the technical aspects of COSO Monitoring, and also how this provides opportunities for CPAs, CFOs, Controllers, Internal Auditors, Boards of Directors and Audit Committee members.

Salon 2 T

Commercial Loan Crisis-Hype or Reality?

Tim West MBA, CRC

Since the residential real estate implosion that has occurred over the last 24 months, many have speculated that commercial real estate is the next “asset bubble” to burst. Tim's presentation is based on facts and information from the Federal Reserve and other sources. Tim has his MBA and is a professor teaching Finance at Point Loma Nazarene University. He's a Vice President in Commercial Banking with Union Bank following a similar role with Wells Fargo Bank for 11 years.

Salon 3 P

Reinvention – “What Got You Here, Won't Keep You Here”

Megan Ahn - Panel Moderator

Megan Ahn, President of Accountants Direct, will moderate the panel: “What Got You Here, Won't Keep You Here” A discussion on how to build strategic skills to advance, the key essentials to a successful transition, and how to reinvent yourself to meet your career aspirations. Panelists: Susan Penn, Director of Human Resources at Profil Institute for Clinical Research; Gail Sullivan, CFO at Ronald McDonald House Charities; and Linda Amaro, Principal at NextWork Services.

10:20-11:10 AM CONCURRENT SESSIONS

Salon 1 A

10 Internal Controls Companies Don't Use but Should

Julie Harrer CPA

Julie Harrer, CPA authored the book Internal Control Strategies and was the leader of Qualcomm's SOX 404 project and has managed several other SOX 404 projects. Today's topic will present a key summary of points that are many times not implemented and will go into the related risks in not doing so.

Salon 2 T

Fundamentals for Beneficiary Designations

Joseph Forlenza CFP, CPA, CRPC

Learn how to manage your retirement assets to maintain your income and preserve your wealth throughout your retirement years. Joseph Forlenza, CFP, CPA, CRPC, Financial Advisor with Ameriprise Financial Services, Inc, will discuss personal financial planning for retirement, retirement income strategies, retirement plan distribution, and estate planning strategies.

Salon 3 P

Stand Out @ Work: Personal Branding Strategies for Great Impact and Influence

Simon Vetter

Based on his book STAND OUT! Branding Strategies for Business Professionals, executive coach Simon Vetter presents practical tips and tools on how to differentiate yourself in a positive, authentic way. With 16 years of experience in training and leadership development, he has advised managers from CalPERS, Callaway Golf, Microsoft, Siemens, UBS and others.

11:25-12:15 PM CONCURRENT SESSIONS

Salon 1 A

SOX 404 for the Smaller Reporting Company – The Wait Is/May Be Over

Wayne Pinnell CPA

After numerous postponements, SOX 404 will become a reality for non-accelerated filers. Wayne R. Pinnell, an audit partner at Haskell & White LLP who has served numerous public and private companies and is a part-time faculty member at California State University, Fullerton will review the basics of Section 404, and how to prepare for a cost-effective and efficient audit. Private companies will gain insight into how to improve their own internal controls.

Salon 2 T

Business Planning: What Does It Buy You? LOTS!

Dan Ruchman MBA Yale School of Management

President of Ruchman & Associates consultants, Dan has more than 25 years helping companies plan their growth, model their business, control operations, analyze and solve problems and increase profitability. In his presentation, he explodes the “four myths” about business planning.

Salon 3 P

Leveraging Social Media for Professional Growth and Career Management

Ken Schmitt

Ken C. Schmitt, President and Founder of TurningPoint Executive Search, has been placing mid and senior-level professionals for more than 12 years. As social media has gained momentum during the past few years, so too has the need for professionals and job seekers alike to manage their personal and professional brand online. You will learn how LinkedIn, Twitter and Facebook can be valuable tools in accomplishing this and gaining success in your next job search. Ken is a native of San Diego and earned his BBA in Business Economics from the University of San Diego.

2010 Accounting Day Schedule (continued)

12:30-1:40 PM — Luncheon and General Session

³
HOURS

1:45-5:05 PM (3 hours) CONCURRENT WITH ALL AFTERNOON SESSIONS

San Diego
Room F

Fraud: What every CPA Should Know

John Tonsick CPA, CFE

John is CPA and Certified Fraud Examiner (CFE) with more than 25 years of experience that include fraud investigation, litigation support, and auditing. His presentation will be both entertaining and informative. The presentation is illustrated with magic and fascinating stories about actual frauds mixed in with technically based aspects of fraud. CPAs and other accountants will learn valuable insight into the nature of fraud and what to do in various fraud related scenarios.

1:45-2:35 PM CONCURRENT SESSIONS

Salon 1 A

FASB Accounting Standards Codification - What, Why and the Practical Implications

Gregg Landers MBA, CMA, CPIM James Comito CPA

James Comito and Gregg Landers are Managing Directors at CBIZ MHM. In their presentation they will provide both CPA's and management accountants insight into the new FASB Accounting Standards Codification and how best to use the standards, moving forward.

Salon 2 T

Green Initiatives and Accounting Job Opportunities

Lee Barken CPA, CISSP, CISA, CCNA, MCP

Lee Barken, CPA, LEED-AP is the IT practice leader at Haskell & White, LLP. Lee plays an active role on the board of directors of CleanTECH San Diego, attended the COP 15 climate change conference in Copenhagen and recently was published in the Wall Street Journal. Today's presentation will bring us current in several areas of Green Initiatives.

Salon 3 T

Reinventing Your Strategy to Take Advantage of the New Normal

Don Sando

Don Sando is the founder of Strategic Results Group, a firm that specializes in business growth and organizational performance. He will present the new market environment, in which buyers don't search for solutions like they used to, and the old marketing techniques don't generate leads like they used to. He will show how to develop an effective business growth strategy in today's "New Normal". Don has an M.S. degree from USC and has taught at the college level.

2:35-3:10 PM Gifts, Drawings and Prizes*

**Must Be Present to Win*

3:10-4:00 PM CONCURRENT SESSIONS

Salon 1 A

AICPA Audit Committee Toolkits

Steve Hermes CPA

Steve Hermes has over 35 years of experience with national CPA firms and a large San Diego firm, including his role as Practice Leader for the Attest Services Group. His presentation explains how Audit Committee Toolkits provide information on Audit Committee responsibilities and administration and the benefits of establishing Audit Committees for private companies, nonprofits, and government agencies.

Salon 2 T

Taxing the Green Economy: Issues and Trends in Taxation of Renewable Energy

Walter Wang J.D., LL.M

Walter Wang is the founder and managing director of Sunflower Tax, a renewable energy tax and finance consulting firm following several years with two large accounting firms advising firms in a variety of tax and business issues. Walter received his J.D. and LL.M (Taxation) from and is an adjunct professor with the University of San Diego School of Law. He is a volunteer with Cleantech Open San Diego and blogs for CleanTalk San Diego and San Francisco based cleantechies.com. Walter is also an adjunct professor of law at the University of San Diego School of Law. Walter will present various tax issues related to today's Green Economy.

Salon 3 P

2010 Accounting & Finance Hiring and Compensation Trends

Jimmy Holbrook - Regional Vice President-Robert Half International

Get up-to-speed on the latest salary and employment information available. Benefit from extensive research to learn about the average starting salaries for financial professionals in order to gain a competitive advantage in today's economy. Jimmy Holbrook is a Regional Vice President for Robert Half International, overseeing operations for the company's San Diego offices.

4:15-5:05 PM CONCURRENT SESSIONS

Salon 1 A

IFRS Update: One Year to Go

Don Schwartz CPA

As a professor of accounting at National University, Don Schwartz has written several articles on international accounting standards. In this presentation, he brings us up to date on the SEC's current position regarding the adoption of IFRS by U.S. public companies, and the likely side effects that would have on accountants and auditors for private companies.

Salon 2 T

Career Planning: Greenhouse Gas As the Ticket to Executive Management

Lawrence Goldenhersh President and CEO

Many new careers are being created as can be seen in recently announced and pending rules issued by the EPA and the Guidance issued by the SEC give accountants a unique opportunity to take a leadership position in the management and reporting of this new set of financial risks and opportunities. Lawrence founded Eviance in 1999 which is a leader in unlocking data needed for greenhouse gas emissions management, carbon accounting, regulatory compliance and more. Mr. Goldenhersh holds a bachelors degree from Duke University and a law degree from the University of Virginia.

Salon 3 P

Using Social Media Strategy to Improve Your Bottom Line

Angie Swartz CPA, MBA

Everywhere you look, you find an article about social media. However, what are needed facts that impact your business? What's really important to improving your bottom line? How do you avoid getting involved in a huge time waster and a world of overwhelm? Angie is the CEO of Square Martini Media, a global consultancy firm that helps businesses incorporate the power of social media. She's a CPA and holds an MBA from UCI.

History and Mission of Accounting Day

The first Accounting Day was held in 1972. The San Diego Chapter of the California Society of CPA's organized the event to interest young people in pursuing an accounting career. These early events were called "Accounting Career Days." In 1976, other professional organizations were invited to participate and the event became known as simply "Accounting Day" with an overall change in format. Today, speakers of local and national prominence present a wide variety of seminars to participants of the event. The purpose of Accounting Day is to promote the accounting profession, to provide an opportunity for networking among accountants in public practice, in industry, and in government, and to provide quality continuing education for attendees.

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And the many others who have contributed their time and efforts.