ANNUAL MEETING PROGRAM
August 7–9, 2014
Hilton Atlanta
Atlanta, GA
Just think of us as family — a big, extended family that wants you to get a good job.

Like any family, we’re here to offer you tips and root for your success. Become an AICPA Student Affiliate member — for FREE — to take advantage of your accounting family’s valuable connections. And we’ll help you hone your skills and pay for school with member-only competitions and scholarships — because that’s how we roll.

Join AICPA today at ThisWayToCPA.com/jointhefamily.
Thank You Attendees!

While you benefit from the latest education BAP has to offer, we also hope you enjoy your time at this year’s Beta Alpha Psi Annual Meeting. We appreciate your continued support of BAP through your attendance and wish you continued success throughout the coming year.
Becker Professional Education is proud to support Beta Alpha Psi.

At Becker, empowering you is always top of mind.

As the leader in CPA Exam Review for over 50 years, Becker Professional Education can prepare you for success on the exam.

- Students who prepare with Becker pass at **double the rate** of non-Becker candidates.*
- The content and functionality of our course **mirrors the CPA Exam** in every way, so there are no surprises on exam day.
- You can study anywhere, anytime from any computer or from Apple® and Android™ tablets and smartphones using our **mobile app**.

Once you start your career, Becker also helps you stay ahead with Continuing Professional Education that covers the critical topics today’s accounting and finance professionals need to know such as U.S. GAAP, Taxation, IFRS, Ethics, Audit and more.

**Visit the Becker booth or becker.com to learn more.**

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* Becker students pass at twice the rate of all CPA Exam candidates who did not take a Becker review course based on averages of AICPA-published pass rates. Data verified by an independent third-party research firm.

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Greetings Beta Alpha Psi Meeting Attendees,

It is our pleasure to welcome you to the 2014 Beta Alpha Psi Annual Meeting in Atlanta, Georgia, home to the Atlanta Braves, Coca-Cola, and the 1996 Summer Olympic Games.

The 2014 Annual Meeting kicks off with two opportunities for our membership to participate in community service efforts for the Atlanta area:

- First, those participants selected for Project Run With It, sponsored by Moss Adams LLP, will develop proposal presentations for local area not-for-profit organizations in response to requests for assistance with special projects; and,

- Second, on Thursday, all remaining Annual Meeting participants will have the opportunity to participate in our annual Community Service Day (CSD). This year, CSD is a collaboration among Beta Alpha Psi, KPMG LLP, KPMG Foundation, First Book, and United Way of Greater Atlanta. For the second year, we are hosting Literacy Fairs at eight local elementary schools serving children from low-income families in Atlanta and a Junior Achievement program. This exceptional opportunity will allow us to engage directly with the children in a variety of fun activities that will hopefully bring out the inner child in each of us. During our Literacy Fair, every child will have a book read to them and then will receive a new book to take home. For many of these students, this will be the first book that they have ever owned.

In addition to these two events that reinforce Beta Alpha Psi’s commitment to giving back to the community, the meeting’s remaining programming, networking, and events are structured to reinforce the fundamental concepts behind developing leadership skills; building relationships with peers and professionals; recognizing and rewarding scholastic success; developing mental toughness; instilling a commitment to lifelong professional development; ethical behavior; and service through the following sessions:

- Presentations created by your peers to help you effectively and efficiently run your chapters;
- Competence-building sessions delivered by the BAP Professional Partners;
- Keynote addresses that will help you develop your leadership skills;
- Expert panel discussions; and,
- Networking opportunities with professionals, exhibitors, faculty advisors, and fellow students.
Competitions and awards are an integral part of the Annual Meeting and will include:

- Gold Chapter Challenge and Superior Chapter Awards – sponsored by KPMG LLP and The KPMG Foundation
- Lifetime Service Award
- Best Practices Competition – sponsored by Deloitte LLP
- Project Run With It Competition – sponsored by Moss Adams LLP
- Business Information Professional of the Year Awards – sponsored by the Institute of Management Accountants (IMA)
- Ethics Awards – sponsored by Grant Thornton LLP
- Inclusive Leadership Awards – sponsored by EY
- Medal of Inspiration Award – sponsored by the AICPA
- Outstanding Faculty Advisor Awards – sponsored by McGladrey LLP
- VITA Awards – sponsored by the IRS
- Outstanding Dean Award
- Most Improved Chapter Award

Thank you for attending this year’s Annual Meeting. We know that you will be glad that you did!
The Beta Alpha Psi Professional Partners further the mission and programs of the Beta Alpha Psi organization through the commitment of financial and people resources, knowledge and talent. Members of the Beta Alpha Psi Professional Partners financially support BAP through annual member fees that subsidize the Regional and Annual meetings each year. Additionally, individual BAP Professional Partner representatives utilize their personal networks to secure speakers for these meetings, or their personal knowledge and expertise to deliver professional session content. Representatives function as judges for the annual Best Practices competition, review nominations and select winners of the Business Information Professional of the Year awards, and network with student members and faculty advisors of Beta Alpha Psi to provide input, counsel and advice regarding careers in the areas of accounting, finance and information systems. Finally, a number of Professional Partner organizations and associations sponsor the many student chapter and faculty advisor awards each year. As a result of the generous support and commitment of the Beta Alpha Psi Professional Partners, Beta Alpha Psi remains the leading organization for students interested in careers in the Business Information field.

### 2013–2014 Beta Alpha Psi Professional Partners

<table>
<thead>
<tr>
<th>Firms/Corporations</th>
<th>Not-for-Profit Organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bisk Education Inc.</td>
<td>Accounting &amp; Financial Women’s Alliance</td>
</tr>
<tr>
<td>BDO USA LLP</td>
<td>American Accounting Association</td>
</tr>
<tr>
<td>Becker Professional Review</td>
<td>American Institute of CPAs</td>
</tr>
<tr>
<td>Chevron Corporation</td>
<td>American Woman’s Society of CPAs</td>
</tr>
<tr>
<td>CPAexcel Exam Review</td>
<td>Association of Government Accountants</td>
</tr>
<tr>
<td>Deloitte LLP</td>
<td>Institute of Management Accountants (IMA)</td>
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<tr>
<td>EY</td>
<td>International Association for Accounting</td>
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<tr>
<td>Fifth Third Bank</td>
<td>Education &amp; Research (IAAER)</td>
</tr>
<tr>
<td>Grant Thornton LLP</td>
<td>GMAC</td>
</tr>
<tr>
<td>Kaplan CPA Review</td>
<td>NASBA Center for Public Trust</td>
</tr>
<tr>
<td>KPMG LLP</td>
<td>National Association of Enrolled Agents</td>
</tr>
<tr>
<td>McGladrey LLP</td>
<td>The Institute of Chartered Accountants in England &amp; Wales (ICAEW)</td>
</tr>
<tr>
<td>Moss Adams LLP</td>
<td>The Institute of Internal Auditors</td>
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<tr>
<td>The Office of the Comptroller of the Currency</td>
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<td>PwC</td>
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<td>Protiviti Inc.</td>
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<td>Robert Half International</td>
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<tr>
<td>SurgentKolar CPA Review</td>
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</tbody>
</table>

**Incoming Firms/Corporations**

- Roger CPA Review

**State Society Organizations**

- California Society of CPAs
- Illinois CPA Society
- Indiana CPA Society
- Kansas Society of CPAS
- Kentucky Society of CPAs
- New York State Society of CPAs
- Texas Society of CPAs
- Washington Society of CPAs
- Wisconsin Institute of CPAs
## Hotel Information

Hilton Atlanta  
255 Courtland Street, NE  
Atlanta, GA 30303  
Phone: 1.404.659.2000

## Registration Hours

<table>
<thead>
<tr>
<th>Day</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday, Aug. 6</td>
<td>5:00–8:00pm</td>
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<tr>
<td>Thursday, Aug. 7</td>
<td>7:00am–6:30pm</td>
</tr>
<tr>
<td>Friday, Aug. 8</td>
<td>7:00am–6:00pm</td>
</tr>
<tr>
<td>Saturday, Aug. 9</td>
<td>7:00–10:00am</td>
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## Exhibit Hours

<table>
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<tr>
<th>Day</th>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>Thursday, Aug. 7</td>
<td>6:30–8:30pm</td>
<td>Welcome Reception</td>
</tr>
<tr>
<td>Friday, Aug. 8</td>
<td>7:00–7:45am</td>
<td>Continental Breakfast</td>
</tr>
<tr>
<td></td>
<td>10:45–11:15am</td>
<td>Refreshment Break</td>
</tr>
</tbody>
</table>

## Location of Sessions

Exhibits are located in the **Galleria Exhibit Hall on the Lower Level**. Sessions are located in meeting rooms on the **Second Floor**. Refer to the floor plan on page 33 for the exact location of all rooms.

## Raffle Drawings

Exhibitors have the liberty to conduct raffles in their assigned area. Winners will be posted in the individual exhibitor areas and not announced. Prizes that are not claimed will be posted on the cork board at the registration desk on Friday and the winner will need to contact the vendor directly for their prize.
GENERAL INFORMATION

**Refreshment Breaks**

Refuel between educational sessions with a beverage, network with members from other chapters, and obtain the answers to all your questions. Check the agenda for refreshment break locations, so you can maximize your time between sessions.

**Reception**

A welcome reception will be held Thursday, Aug. 7, from 6:30–8:30pm in the Exhibit Hall. The Exhibit Hall is located in the Galleria Exhibit Hall on the Lower Level.

**Safety and Security Information**

The safety and security of attendees is our first priority. Should you have or be aware of an emergency, please be prepared to provide the following information immediately:

- Nature of the emergency
- Exact location of the emergency

**Emergency Procedures:**

The Hilton Atlanta is fully prepared to handle different types of situations to assist our guests. The following is information on our emergency procedures:

- The hotel internal emergency number is 66.
- The hotel has an emergency response team 24 hours a day. In the event of an emergency, calling the emergency number 66 will initiate the appropriate response.
- Paramedics, Fire Department, and the Police Department are all located approximately 5 minutes from the hotel.
- Our Security Department, as well as a small number of other employees, are trained in CPR and First Aid.
- Emergency evacuation routes and procedures are located on the inside of all guest room doors.

**Services**

**Badges:** Please wear your badge at all times while attending the meeting.

**Lost and Found:** Check with the registration desk.

**Info Center:** An Information Center is located in the registration area. Any messages for peers will be posted here as well as any program updates.

**Meeting Etiquette**

Once you enter a session, please remain until a break is announced so that you can exit without making a disturbance. Please ensure that your cell phones are turned off or set to silent mode.
MAXIMIZE THE EXPERIENCE

Social Media
Enhance your onsite and post-meeting experience and continue networking with your fellow BAP members on Twitter, Facebook and LinkedIn.

- Twitter: #BAPAM14
- Facebook: Facebook.com/BetaAlphaPsiIntl
- LinkedIn: Beta Alpha Psi

Annual Meeting App
Be sure to download the Beta Alpha Psi Annual Meeting app to enhance your onsite experience. The free BAP Annual Meeting Mobile App gives you immediate access to the meeting schedule, speaker bios, agenda by day, exhibitor list and more.
Richard Caturano is a partner in the Boston Office of McGladrey LLP, the fifth largest U.S. accounting firm, and serves as the firm’s national leader of culture, diversity and inclusion. He was a founding member of Vitale, Caturano and Company, and led the firm through substantial growth to become the largest independent firm in New England as well as a Top 40 firm in the U.S. In 2010 his firm merged with McGladrey and is now McGladrey’s third largest office. Under his leadership, Vitale, Caturano and Company, received numerous awards, including: Boston Globe’s “Top 100 Places to Work” list, “#1 Best Place to Work For” by Vault Accounting Guide, and one of the “Best Places to Work” in Massachusetts by the Boston Business Journal. Richard is a five-time recipient of Accounting Today’s “100 Most Influential People in Accounting” and has been recognized by Winning Workplaces as one of the “Best Bosses” nationwide.

Richard began his career in audit, later obtained a master’s degree in taxation and has specialized in servicing middle market clients in a wide variety of industries. He has also provided consulting services to other professional service firms. He is a frequent speaker on issues relating to firm management including: strategic planning, internal communications, rapid growth, and ensuring the future of the accounting industry.

Richard is very active in advancing the accounting profession. He is currently the Immediate Past Chairman of the Board for the American Institute of Certified Public Accountants (AICPA). Previously in 2001, Richard was appointed to the AICPA Executive Committee for Private Companies Practice Section, served for two years, and was then elected chairman for a three-year term that ended in October 2006. Richard served on the Massachusetts Society of Certified Public Accountants (MSCPA) Board of Directors from 2001–2005. In 2005, he served a one-year term as MSCPA president. Richard’s term as AICPA Chairman was focused, in part, on advancing diversity in the CPA profession.
Flip Flippen is the author of the *New York Times* and *USA Today* best seller, *The Flip Side: Break Free of the Behaviors That Hold You Back*, released in May of 2007. He developed the concept of Personal Constraints™ as a means to overcome performance inhibitors and to accelerate the growth of many of the world’s greatest executives, educators and professional athletes. Using his background in psychotherapy, Flip and his research group developed The Flippen Profile, a powerful behavioral assessment tool, which uncovers the unique constraints and strengths of an individual in order to improve performance. This breakthrough tool is used in corporate, sports and educational arenas on a global basis. Flip is also the founder of The Flippen Group, which was voted by *Texas Monthly* magazine as the Number Two best place to work in the state of Texas. The Flippen Group is one of the largest educator training companies and one of the fastest growing leadership development organizations in North America. The company’s breakthrough educational processes and curricula are in use in 5,000 school districts and campuses in 42 states. The success of his efforts has been documented on *The Today Show*, *The Super Bowl Pre-Game Show*, and *Speed Channel*’s *NBS 24/7*, as well as in countless publications over the years. Flip also contributes monthly blog submissions for *SUCCESS Magazine*. He is widely recognized as a world-class entrepreneur, educator and philanthropist. The first sixteen years of his professional life were spent building a non-profit organization that worked with gangs and throw-away kids. In the process, he also built a 500-acre residential facility for young people. From education to gangs to corporate executives to private equity to sports — he has always had the same focus: helping others do well. Flip and his wife Susan’s mission is to “bring out the best in people.” They have done this in their businesses, as well as in their personal life, as they have helped raise more than 20 children. Flip and Susan reside on their ranch in College Station, Texas.
## SUGGESTED TRACKS

### PRESIDENT

<table>
<thead>
<tr>
<th>Session</th>
<th>Recommended</th>
<th>Position Specific</th>
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<tbody>
<tr>
<td>1</td>
<td>1-09</td>
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<td>2</td>
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<td>2-01</td>
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<td>3</td>
<td>3-01, 3-02, 3-03 or 3-04</td>
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<tr>
<td>4</td>
<td>4-02, 4-03 or 4-04</td>
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</tr>
<tr>
<td>5</td>
<td>5-01</td>
<td>5-02 (only if 2015 regional host)</td>
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### TREASURER

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<td>3</td>
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### REPORTER

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<tr>
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### SMALL CHAPTER

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### INTERNATIONAL

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<td>5-09</td>
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<tr>
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## FACULTY ADVISOR

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<tbody>
<tr>
<td>Thursday</td>
<td>New Advisor Workshop</td>
</tr>
<tr>
<td>Session 1</td>
<td>1-01</td>
</tr>
<tr>
<td>Session 3</td>
<td>3-01</td>
</tr>
<tr>
<td>Session 4</td>
<td>4-06</td>
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<tr>
<td>Session 5</td>
<td>5-02 (only if 2015 regional host)</td>
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## FINANCE STUDENT

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<tr>
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<tbody>
<tr>
<td>Session 1</td>
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<tr>
<td>Session 2</td>
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<tr>
<td>Session 5</td>
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## INFORMATION SYSTEMS STUDENT

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<tbody>
<tr>
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</tr>
<tr>
<td>Session 2</td>
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<tr>
<td>Session 3</td>
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# Beta Alpha Psi Annual Meeting

**Hilton Atlanta • Atlanta, GA • Aug. 7–9, 2014**

## WED/THU FUNCTION

### WEDNESDAY, AUG. 6

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>5:00–5:45pm</td>
<td><strong>Project Run With It Registration</strong></td>
<td>Foyer – Third Floor</td>
</tr>
<tr>
<td>5:00–8:00pm</td>
<td><strong>Registration Open</strong></td>
<td>Grand Ballroom Foyer</td>
</tr>
<tr>
<td>6:00–9:00pm</td>
<td><strong>Project Run With It Opening Session</strong></td>
<td>Rooms 302, 303 and 304 – Third Floor</td>
</tr>
</tbody>
</table>

Sponsored by Moss Adams LLP

Please see the “Conference at a Glance” for a detailed schedule and room locations.

### THURSDAY, AUG. 7

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00am–6:30pm</td>
<td><strong>Registration Open</strong></td>
<td>Grand Ballroom Foyer</td>
</tr>
<tr>
<td>7:00am–4:45pm</td>
<td><strong>Project Run With It</strong></td>
<td></td>
</tr>
</tbody>
</table>

Sponsored by Moss Adams LLP

Please see the “Conference at a Glance” for a detailed schedule and room locations.

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00–8:45am</td>
<td><strong>Continental Breakfast</strong></td>
<td>Grand Ballroom Foyer</td>
</tr>
<tr>
<td>8:30–10:00am</td>
<td><strong>New Faculty Advisor Workshop</strong></td>
<td>Rooms 212 and 213</td>
</tr>
</tbody>
</table>

**Presenters:** Janice Klimek, Chapter Advocate  
Veronda Willis, Chapter Advocate

All faculty advisors are welcome to attend this workshop, but it is designed for those that are “new” to the role. Basic information about advising a chapter will be provided, including going over some of the common language of BAP (just what is an ROA?) and providing helpful tips for managing a chapter while holding down a full-time job.

---

*Personal video or audio recording (by cell phone, cameras, tape recorders, etc.) of the sessions is strictly prohibited.*
**THURSDAY FUNCTION**

**9:00–10:00am**

**Welcome and Community Service Day**

*Location:* Grand Ballroom

*Sponsored by KPMG LLP and KPMG Foundation*

*Host schools:* Seattle University  
University of San Diego

KPMG LLP will welcome participants to the annual meeting and provide instructions for Community Service Day activities.

**10:00am–2:00pm**

**Community Service Day**

*Sponsored by KPMG LLP and KPMG Foundation*

A collaboration between Beta Alpha Psi, KPMG LLP, KPMG Foundation, First Book, and the United Way of Greater Atlanta, this year’s CSD allows us to host our second International Day of Literacy. It will include Literacy Fairs at elementary schools and Junior Achievement serving children from low-income families in the Atlanta area. This exceptional opportunity will allow you to engage directly with the children in a variety of fun activities and provide a child a new book to take home.

**5:00–6:30pm**

1. **Opening Plenary Session**

*Location:* Grand Ballroom

*Facilitator:* Margaret Fiorentino, BAP Executive Director  
Shawn Harter, BAP Incoming President-elect  
Jan Taylor Morris, BAP President

Come make new friends and demonstrate your leadership skills in this fun, interactive session to kick off the meeting. This session will have you strategizing, negotiating, and bidding for talent needed on your MLB team. No prior MLB experience needed! Creativity, thinking outside the (batter’s) box, and a positive attitude will help you start the meeting on the right foot.

*Awards Recognized:*

- Ethics Awards, sponsored by Grant Thornton LLP
- Faculty Advisors of the Year, sponsored by McGladrey LLP
- Gold Challenge, sponsored by KPMG LLP and the KPMG Foundation
- Most Improved Chapter
- Outstanding Dean Award

*Note:* All BIPOYs will be presented during the Friday afternoon luncheon.

**6:30–8:30pm**

**Welcome Reception & Exhibits**

*Location:* Galleria Exhibit Hall

Visit the exhibits to network, collect information of interest and to enter raffles for prize drawings.
<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
</table>
| 7:00am–6:00pm | Registration Open  
Location: Grand Ballroom Foyer |
| 7:00–7:45am  | Breakfast & Exhibits  
Location: Galleria Exhibit Hall |
| 8:00–9:15am  | 2. Plenary Session  
Location: Grand Ballroom  
**Speaker:** Richard J. Caturano, Immediate Past Chairman, AICPA  
Rich Caturano, AICPA Chairman 2012–2013, is the Executive Managing Partner in Boston of McGladrey LLP. He was a founding member of Caturano and Company and the former CEO of Baker Tilly North America. Throughout his career, he has specialized in management consulting and business valuation services for a wide variety of industries. He is a frequent speaker on issues relating to firm management, including strategic planning, rapid growth, internal communications and ensuring the future of the accounting profession. Rich will share his experiences and insights from his career to help you be better equipped to lead and know how to develop leaders in our professions. |
| 9:30–10:45am | Concurrent Sessions I  
**1-01. Faculty Exchange: Board of Directors, Chapter Advocates and BAP Professional Partners with Faculty Advisors**  
Location: Salon D  
**Moderator:** Kevin D. Stocks, President-Elect, Brigham Young University  
Faculty Advisors, BAP Board Members, Chapter Advocates, and Professional Partners share ideas for BAP’s future and discuss current issues. |
| 9:30–10:45am | **1-02. Project Run With It**  
Location: Room 201  
**Not-for-Profit:** Jewish Family & Career Services  
**Judges:** Connie Esmond-Kiger, Faculty Advisor, Ohio University  
Amy Runge, Moss Adams LLP  
Debi Rice McNeil, Jewish Family & Career Services  
Students present their solutions to real-life not-for-profit issues. The first place team will be announced at the closing session on Saturday. |
### Concurrent Sessions I (continued)

#### 1-03. Project Run With It
**Location:** Room 202
**Not-for-Profit:** CaringWorks Inc.
**Judges:**
- Dave DeBoskey, Faculty Advisor, San Diego State University
- Corinne Baughman, Moss Adams LLP
- Leah Humphries, CaringWorks Inc.

Students present their solutions to real-life not-for-profit issues. The first place team will be announced at the closing session on Saturday.

#### 1-04. Project Run With It
**Location:** Rooms 207 and 206
**Not-for-Profit:** Georgia Center for Nonprofits
**Judges:**
- Steve Carlson, Faculty Advisor, University of North Dakota
- Melissa Harman, Moss Adams LLP
- Chris Allers, Georgia Center for Nonprofits

Students present their solutions to real-life not-for-profit issues. The first place team will be announced at the closing session on Saturday.

#### 1-05. How Corporate Sustainability Impacts Businesses Today
**Location:** Rooms 204 and 205
**Presenter:** Justin Neff, Moss Adams LLP

The business world is ever-changing, and the success of an organization is no longer measured by profitability alone. As global concern over the environmental and social impacts that businesses have on their communities continues to rise, awareness of the trends and regulations surrounding corporate social responsibility is vital to the success of an organization. Learn how these changes are impacting businesses, and why corporate sustainability should really be considered corporate survival.

#### 1-06. Setting Goals and Achieving Success
**Location:** Salon A
**Presenter:** Roger Philipp, Roger CPA Review

What is your one-year, five-year, or ten-year plan? This can be one of the most intimidating questions when in an interview or networking opportunity, but it doesn’t have to be! Learn how to build a stronger work ethic, enhance your time management skills and gain a better understanding of how to capitalize on your true potential. Listen and interact with Roger as he shares his personal experiences on how to set the best goals for both your career and personal life in order to maximize success.
Concurrent Sessions I (continued)

1-07. Navigating a Successful Career – Panel
Location: Salon C
Presenters: Alvia E. Brown, The Coca-Cola Company
John Fuchko, Board of Regents of the University System of Georgia
Lisa Mathiak, EY
Daniel Street, PRGX Global
Moderator: Maunda Land, The Institute of Internal Auditors

Starting a new career can be tough and learning how to navigate the work force even tougher. Gain career advice from four current practitioners of both internal and external audit who have successfully navigated their careers.

1-08. What Is a “401K”? And Why Do I Need One? I’m Only 25.
Location: Salon B
Presenter: Tasha Woodlee, SurgentKolar CPA Review

This presentation will explain the differences between a 401K and an IRA (traditional vs. Roth), company contributions, how to calculate “how much is enough?” and how to choose the best plan for you as an individual.

1-09. Officer Workshop (Leadership)
Location: Salon E
Presenters: University of Arkansas
Brigham Young University
James Madison University
New Mexico State University
The Ohio State University
University of Utah
Moderator: Mitchell Franklin, Faculty Advisor, Syracuse University

The average tenure for chapter officers is about two semesters. How can you be an effective leader in such a short time? Experienced chapter officers share their advice for chapter presidents, reporters and treasurers in this must-attend session for chapter officers.
FRIDAY

9:30–10:45am
Concurrent Sessions I (continued)

1-10. Careers in Information Systems
Location: Rooms 212 and 213
Presenters: Steward Negley, Protiviti
Casey Jo Robertson, Protiviti
Domonique Williams, Protiviti

A career in information systems is ever-changing and evolving. If you are not drawn to doing the same thing day-in and day-out, perhaps a role within technology is ideal for you. There are countless roles one can take with a background in IT, depending on an individual’s strengths and interests. During this session we will discuss many of the different opportunities that are available to someone with a strong business background, and an interest in continuing to learn year after year as one’s career progresses.

10:45–11:15am
Refreshment Break & Exhibits
Location: Galleria Exhibit Hall

11:15am–12:30pm
Concurrent Sessions II

2-01. Board of Directors, Chapter Advocates and Professional Partners with Chapter Presidents
Location: Salon D
Moderator: Kevin D. Stocks, President-Elect, Brigham Young University

Chapter presidents meet with BAP Board members and Professional Partners to share ideas for BAP’s future and discuss other relevant issues.

2-02. Project Run With It – Pt. 2
(Continuation from 1-02)
Location: Room 201

2-03. Project Run With It – Pt. 2
(Continuation from 1-03)
Location: Room 202

2-04. Project Run With It – Pt. 2
(Continuation from 1-04)
Location: Rooms 206 and 207
2-05. Good Manners are Good Business

*Location:* Salon A
*Presenter:* Alex Miller, AWSCPA

In today’s fast-past world, everyone defines etiquette differently. One person’s good etiquette skills may be frowned upon by others. No matter how you define etiquette, it is an essential part of getting ahead in today’s competitive global marketplace, even if you never leave your home town. Learn valuable tips for tricky domestic and international situations such as dining situations, company functions, gift giving, business cards and introductions. This interactive session will also give you an opportunity to share your etiquette stories, and have fun learning about unusual food you might encounter on your travels.

2-06. If You Build It — the Jenga Structure Challenge

*Location:* Rooms 212 and 213
*Presenters:* Kim McLaughlin, McGladrey
Amy Rothstein, McGladrey

Join us for an interactive session to simulate how a well leveraged public accounting client service team operates. Learn about the business of the public accounting profession and how you can and will contribute to its success should you choose this career path.

2-07. Myth Busters — Common Misconceptions Regarding a Career in Accounting

*Location:* Salon B
*Presenter:* Bob Pearlman, BDO

Is being an accountant boring? What exactly does “busy season” mean? Come to this interactive session where you’ll hear about common “myths” about accounting and walk away with an understanding of the realities and rewards of a career in accounting. #whatdidigetmyselfinto

2-08. Innovative Recruiting of Members

*Location:* Salon C
*Presenters:* University of North Carolina at Charlotte
Eastern Michigan University
University of Nebraska – Lincoln
Kent State University
University of Southern Indiana

*Moderator:* Deborah Lindberg, Faculty Advisor, Illinois State University

Does your chapter struggle to expand its membership, let alone replace graduating members? Perhaps you haven’t established and communicated your chapter “brand” effectively. Chapters will share ideas on attracting candidates in this session. Come see what has worked for others.
11:15am–12:30pm  Concurrent Sessions II (continued)

2-09. Fundraising Strategies
   **Location:** Salon E
   **Presenters:** Ohio University
   Texas State University – San Marcos
   University of Louisiana – Lafayette
   University of Missouri – Kansas City
   University of Wisconsin – Madison
   Western Washington University
   **Moderator:** Arthur Reed, Faculty Advisor, Bentley University

   Generating funds to provide for an active chapter can be challenging. Chapters will present ideas about what has worked for their chapters, from auctions to sporting activities.

2-10. “CPA? Or Nah...”
   **Location:** Rooms 204 and 205
   **Presenter:** Denise Probert, Kaplan CPA Review

   Is the CPA designation required to advance in the accounting profession? What are my other choices? This professional session will explore the advanced designations available for an accounting, finance, or information systems professional to help you better answer these questions. You will leave with a solid understanding of the requirements for licensure as a CPA, CFA, CMA, CIA, CISA, and other advanced designations appropriate for your area of interest.

12:30–1:45pm  Lunch & Awards
   **Location:** Grand Ballroom

   **Awards Recognized:**
   - Business Information Professional of the Year – Education, sponsored by IMA
   - Business Information Professional of the Year – Industry & Government, sponsored by IMA
   - Business Information Professional of the Year – Professional Services, sponsored by IMA
   - Inclusive Leadership Award, sponsored by EY
   - Medal of Inspiration, sponsored by the AICPA
**Concurrent Sessions III**

3-01. BAP Board Session: Reporting Intranet Features

*You Need to Know!*

**Location:** Rooms 212 and 213  
**Presenters:** Margaret Fiorentino, Executive Director, BAP  
Executive Office  
Lisa Wicker, Manager – Chapter Services, BAP  
Executive Office

This session is strongly recommended for all chapter reporters and faculty advisors. The session will cover activating your officer login accounts, online activity reporting, student hours verification report, and paying for membership dues and chapter maintenance fees via credit cards.

3-02. Best Practices: Leadership

**Location:** Salon E  
**Judges:** Kim McLaughlin, McGladrey – Lead Judge  
Mark Bruno, PwC, LLP  
Silke Olsen, Moss Adams LLP  
Donna Street, IAAER  
Valerie Wendt, Bisk CPA Review  
Tasha Woodlee, SurgentKolar CPA Review

**Competitors:** Brigham Young University  
James Madison University  
Kent State University  
Missouri State University  
New Mexico State University  
San Diego State University  
University of North Carolina at Charlotte  
Western Washington University

Effective leadership is required for an organization to move forward in the right direction. There are many ideas about leadership, but most modern thinking on the topic differentiates leadership from management and from positional authority (e.g., president of the chapter). Every BAP chapter must be managed well — the schedule developed and activities reported, the monies maintained — but the focus of your presentation should not be on these managerial duties. Rather, your presentation should focus on how your chapter exhibits leadership and what your chapter does to foster and develop leadership in its members/candidates, its campus and surrounding community, and within the overall BAP organization.
2:00–3:15pm
Concurrent Sessions III (continued)

3-03. Best Practices: Collaboration

Location: Salon C

Judges: Stephanie Polon, BDO USA LLP – Lead Judge
          Alfonzo Alexander, NASBA
          Nick Milazzo, Fifth Third Bank
          Alex Miller, AWSCPA
          Jodi Ryan, IMA

Competitors: Pace University & Towson University
            San Diego State University
            Southeast Missouri State University &
            University of Central Missouri
            University of Central Florida
            University of Denver
            University of Texas at El Paso
            University of Washington & Seattle University
            Youngstown State University

What does your chapter do to make our international organization more collaborative and thus stronger and moving in the right direction? Think in terms of collaborative leadership. How does your chapter contribute to the collective knowledge of all members/candidates of Beta Alpha Psi? How do you — other than through Best Practices — share your successful ideas with other BAP chapters, other student organizations, your campus and local communities? Does your chapter have some great ideas for using BAPConnect to reinforce the collaboration among chapters? If so, this is the place to showcase those ideas. Has your chapter developed strong ties with other chapters in your region through innovative means and have your chapters strengthened one another? If so, share what you did to foster those collaborative relationships. We know that we are stronger when we work together.
### FRIDAY FUNCTION

**2:00–3:15pm**

Concurrent Sessions III (continued)

#### 3-04. Best Practices: Strategic Planning

**Location:** Salon D

**Judges:**
- Scott McQuillan, Deloitte – Lead Judge
- Maunda Land, The Institute of Internal Auditors
- Stacy Ray, Becker Professional Education
- Casey Jo Robertson, Protiviti
- Ray Ruiz, KPMG LLP
- Natasha Schmidt, Office of the Comptroller of the Currency

**Competitors:**
- Old Dominion University
- Pacific Lutheran University
- University of Louisiana at Lafayette
- University of Nebraska – Lincoln
- University of Northern Colorado
- University of San Diego
- University of Tampa
- Western Illinois University

Each chapter should have plans in place to keep the chapter moving forward operationally, but does your chapter have a strategic mission/vision for the future? For example, perhaps your chapter decided to focus your community service efforts toward ensuring your local food bank was always adequately stocked or you decided to increase your membership by 50% within the next two years. Your presentation should focus on (1) how your chapter developed its strategic mission/vision; (2) what are specific examples of how this strategy was implemented and positive measurable results were achieved, and (3) how other chapters can emulate your success in the arena of strategic planning.

#### 3-05. Using Social Media as a Professional

**Location:** Room 202

**Presenter:** Paul Wiese, Roger CPA Review

Instagram, Facebook, LinkedIn and Twitter — you would have to be living under a rock to not be using these sites. But are you using them correctly to help advance your potential career? Additionally, are you showcasing the best professional etiquette when engaging with the sites? Your use of Social Media can secure a fantastic future career venture or truly hinder your professional opportunities. Please join us for an interactive discussion including personal stories on how to Use Social Media as a Professional.
Concurrent Sessions III (continued)

3-06. Cyber Forensics
Location: Rooms 204 and 205
Presenter: Tony DeSarro, KPMG

Two things are never going away: crime and technology. This session will cover cyber forensics. In a digital age, cyber forensics plays a large role in investigations. The age of sifting through banker boxes and file cabinets is over. This session will cover the types of cyber investigations, best practices and procedures, computer artifacts useful for investigations, and some of the common misconceptions of forensics due to popular TV shows like CSI and Law and Order.

3-07. Keeping the Chapter Active
Location: Salon A
Presenters: Bentley University
Boise State University
Creighton University
University of Hawaii – Manoa
University of Kentucky
University of Mississippi
Moderator: Kelly Noe, Faculty Advisor, Stephen F. Austin State University

Have you ever wondered how to retain those enthusiastic candidates following their initiation and fall recruiting? Chapter share their strategies for keeping them coming back for more!

3-08. Creative Service Projects
Location: Salon B
Presenters: Auburn University
Georgia State University
Marquette University
Samford University
University of New Mexico
Moderator: Leon Korte, Faculty Advisor, University of South Dakota

Looking for ideas for service projects that are both meaningful AND fun? Chapters share new and creative approaches to service.

3-09. Conversation with Students
Location: Rooms 206 and 207
Presenters: Alex Johnson, BAP Alumni Representative
Natalie Steverson, BAP Alumni Representative

A question-answer panel with Alumni Representatives on the transition from Student to Professional, strategies for success, and any other topics student attendees wish to discuss.

3:15–3:30pm
Refreshment Break
Location: Grand Ballroom Foyer
Concurrent Sessions IV

4-01. The Impact of Strategic Decisions on Organizational Culture
Location: Room 202
Presenter: Denise Probert, Kaplan CPA Review
This interactive session will illustrate how financial information is used to make strategic decisions. Bring your best decision making skills and be prepared to bring out the best in others as we experience culture creation and strategic decision making in a fun, interactive game. This high-energy session will be sure to keep you engaged and may be life changing in your approach to strategic decision making.

4-02. Best Practices: Leadership
Continuation from 3-02.
Location: Salon E

4-03. Best Practices: Collaboration
Continuation from 3-03.
Location: Salon C

4-04. Best Practices: Strategic Planning
Continuation from 3-04.
Location: Salon D

4-05. Professional Skepticism
Location: Room 201
Presenter: Avery Munnings, Deloitte
A widely held perception of accounting is that it’s the process of “bean counting.” In reality Audit requires unique skills, it is rigorous, challenging and ever-changing. It is a profession that is absolutely critical to the investing public and the capital markets. This session will talk about what professional excellence, skepticism, and objectivity are and how these core competencies are required to fulfill our professional responsibilities.

4-06. Maintaining Relationships with Alumni
Location: Salon A
Presenters: Bowling Green State University
Louisiana State University
North Carolina A&T State University
Oklahoma State University
San Francisco State University
University of Massachusetts – Amherst
Moderator: David Jones, Faculty Advisor, Case Western Reserve University
Alumni are a great source of support for local chapters, providing everything from donations to professional speakers. Come learn how chapters are involving alumni in their chapter activities.
3:30–4:45pm

**Concurrent Sessions IV (continued)**

**4-07. Essential Skills**

*Location:* Salon B  
*Presenters:* California State University – Los Angeles  
Colorado State University  
Elon University  
Idaho State University  
University of Tennessee at Chattanooga  

*Moderator:* Bill Driscoll, Faculty Advisor, Suffolk University

Many students seek to obtain internships and full-time job opportunities through Beta Alpha Psi, but once they have the job, they must develop their “essential skills” in order to succeed professionally. New in 2014, each award-seeking chapter was required to hold at least one professional session on one of the following topics: business writing skills, facilitation skills, managing distractions, ethical decision making skills, negotiation skills, conflict management, or change management. Come see what these chapters did to meet this requirement.

**4-08. Beyond the Norm — Surviving as a Small Chapter**

*Location:* Rooms 204 and 205  
*Presenters:* Bradley University  
Gonzaga University  
Morgan State University  
Murray State University  
University of Sydney – Australia  
Valdosta State University  

*Moderator:* George Durler, Faculty Advisor, Emporia University

Small chapters face unique challenges. Want to visit with others who understand your situation? Come hear how these small chapters do it.

**4-09. Big Data**

*Location:* Rooms 212 and 213  
*Presenters:* Sara Brabender, EY  
Scott Jarrell, EY

Big Data and analytics represent an innovation that transforms everyday lives and that market-leading businesses use to drive competitive advantage. Understand the value of utilizing data analytics in the various aspects of company operations, hear about leading practice elements and common challenges, and learn how professional services firms, through Big Data and analytics, are better able to serve clients.
FRIDAY FUNCTION

3:30–4:45pm Concurrent Sessions IV (continued)
4-10.  Leading from Any Seat
   Location: Rooms 206 and 207
   Presenter: Tim McClinton, Becker

   Leadership is not just reserved for CEOs or other top leaders of an organization. For a company to be truly successful, everyone has to be involved and feel that they can contribute in a meaningful way. In this session, you will learn how as team members and future leaders you can influence outcomes and make positive contributions to an organization’s success no matter your title or role.

7:00–10:00pm Atlanta Braves vs. Washington Nationals baseball game

SATURDAY, AUG. 9

7:00–10:00am Registration Open
   Location: Grand Ballroom Foyer

7:00–7:45am Breakfast
   Location: Grand Ballroom Foyer

8:00–8:10am VITA Awards
   Location: Grand Ballroom

8:10–9:30am 3. Plenary Session
   Location: Grand Ballroom
   Speaker: Flip Flippen, Founder & President, Flippen Group

   Whether growing young Olympic athletes, professional money managers, or military leaders, Flip Flippen’s mission is the same: To build relationships and processes that bring out the best in people. Flip has crafted a presentation specifically for Beta Alpha Psi and will bring his years of leadership development to help you think about the behaviors and attitudes that you might have that stand in the way of your own personal success. You don’t want to miss this opportunity to hear from this best-selling author and one of the nation’s leading experts in the field of leadership development.

9:45–11:00am Concurrent Sessions V

5-01.  BAP Board Session: Program for Chapter Activities and Reporting Intranet
   Location: Salon D
   Presenters: Mehmet Kocakulah, Chapter Advocate
   Linda Schain, Chapter Advocate
   Lisa Wicker, BAP Manager – Chapter Services

   Review of the 2014-15 PCA and the Reporting Intranet. This session will briefly cover navigating the Reporting Intranet. This is a must-attend for new and experienced FAs and student officers.
Concurrent Sessions V (continued)

5-02. BAP Board Session: Chapter Advocates, BAP Professional Partner Liaisons and 2015 Regional Meeting Host Chapters
Location: Salon E
Moderators: Deborah Medlar, Chapter Advocate
Gwendolyn Highsmith-Quick, Chapter Advocate

Mandatory meeting for chapters hosting a 2015 Regional Meeting, Chapter Advocates and Professional Partners liaisons to begin the planning process, share ideas and learn about their responsibilities.

5-03. Accounting Skills at the Crossroads: Strategic Management Accounting for Business and Career Success
Location: Rooms 206 and 207
Presenter: Ken Witt, AICPA

In our increasingly fast-paced, global, mobile and digital world, successful accountants, like successful businesses, are forward-looking and innovative. They analyze data and communicate their insights effectively to influence business decisions that have impact. Attend this session to learn about the skills that you will need to contribute to decision-making, improve performance, and add value to ensure both long-term business and career success.

5-04. Creative Networking
Location: Rooms 212 and 213
Presenters: Scott McQuillan, Deloitte
Paige Sacks, EY

Networking is considered one of the personal skills essential to good leadership and career advancement. Everyone tells you to network. But how do you do it? Learn what networking means and why it is important. This will be an interactive session about developing the habits of a successful networker. Listen to personal stories and learn how networking skills can make difference in your career. This discussion lays the groundwork for taking the right steps so that your network develops while you gain confidence in the process. Sometimes, it really is not what you know, but whom you know.

5-05. Careers in Finance
Location: Rooms 204 and 205
Presenter: Nick Milazzo, Fifth Third Bank

A Career in Finance is about being an important part of a company and leading that company to financial growth and success. There are countless opportunities and avenues depending on an individual’s strengths and interests on what that career looks like. During this session we will discuss many of the different opportunities that are available to someone with a finance or accounting degree.
Concurrent Sessions V (continued)

5-06. Maintaining Relationships with Alumni
Location: Salon A
Presenters: California State University – Fullerton
Long Island University – Post
University of Akron
University of Iowa
University of Southern Mississippi
Widener University
Moderator: Joanie Sompayrac, Faculty Advisor, University of Tennessee at Chattanooga

Alumni are a great source of support for local chapters, providing everything from donations to professional speakers. Come learn how chapters are involving alumni in their chapter activities.

5-07. Creative Service Projects
Location: Salon B
Presenters: Sam Houston State University
University at Buffalo
University of North Carolina – Greensboro
University of San Diego
Western Kentucky University
Moderator: Janet O’Tousa, Faculty Advisor, University of Notre Dame

Looking for ideas for service projects that are both meaningful AND fun? Chapters share new and creative approaches to service.

5-08. Fundraising Strategies
Location: Salon C
Presenters: California State University – Fresno
Missouri State University
Southeast Missouri State University
Stephen F. Austin State University
University of Alabama
University of South Florida
Moderator: Marci Butterfield, Faculty Advisor, University of Utah

Generating funds to provide for an active chapter can be challenging. Chapters will present ideas about what has worked for their chapters, from auctions to sporting activities.
9:45–11:00am  Concurrent Sessions V (continued)

5-09. IFRS/Convergence Update: What Do BAP Members Need to Know?
Location: Room 202
Presenter: Donna Street, IAAER

Today IFRS is the financial reporting standard for listed companies in more than 100 countries. In countries, including the U.S., financial information professionals need to be “bilingual.” Learn what IFRS is, why IFRS is important and where and how IFRS is used around the world.

11:00–11:15am  Refreshment Break
Location: Grand Ballroom Foyer

11:15am–12:30pm  Concurrent Sessions VI

6-01. Non-U.S. Chapter Meeting
Location: Room 201
Moderators: Lee Radebaugh, BAP Director of Global Activities
Pearl Rozenberg, Faculty Advisor, University of Sydney

Faculty Advisors and officers are invited to attend this session to learn how to make BAP work outside the U.S. as well as discover future plans for international expansion. Contribute to the conversation as the group discusses international challenges and opportunities.

6-02. VITA — When One Size Does Not Fit All
Location: Rooms 206 and 207
Presenter: Rawlin Tate, Internal Revenue Service, SPEC

(Stakeholders, Partners, Education and Communication) – SPEC understands that BAP chapters come in all sizes. SPEC further understands that their common denominator is the willingness to serve the community. Come to the SPEC-VITA workshop to hear how your chapter, regardless of size, can participate in the VITA Program. The workshop will highlight the different VITA Programs: Traditional, Facilitated Self-Assistance (FSA), Virtual, and Foreign Student. The workshop will also discuss end of filing season BAP/SPEC Awards and their criteria.
Concurrent Sessions VI (continued)

6-03. The Journey from Student to CFO: Choices, Challenges and Opportunities
Location: Room 202
Presenter: Harry J. Cynkus, Rollins Inc.
Dan Defnall, City of Morrow, Georgia
Larry Loyed, Aderhold Properties Inc.
Scott Rosenberg, Purchasing Power

If you are wondering how to become a CFO, then you’ve found the right session to attend! While a CFO position is difficult to attain and requires many years of work experience and specialized knowledge, you should believe that it is well within your grasp. Hear from our speaker about what a typical CFO does, along with suggestions regarding areas to focus on to keep your career on track.

6-04. Strategic Leadership for the Profession
Location: Rooms 204 and 205
Presenter: Richard Spencer, ICAEW

Building on the key questions of “what is a profession?” and “what are our aspirations as leaders of the 21st century profession?”, we engage in a challenging discussion on the strategic leadership for a global profession. Through presentation and facilitated conversation, we will invite you to think critically about your future professional roles in a changing and connected society.

6-05. Keeping the Chapter Active
Location: Salon D
Presenters: Pace University
San Diego State University
University of Denver
University of Idaho
University of Nebraska at Omaha
University of Washington
Moderator: Chris Lyon, Faculty Advisor, Fort Lewis College

Have you wondered how to retain those enthusiastic candidates following their initiation and fall recruiting? Chapters share their strategies for keeping them coming back for more!
Concurrent Sessions VI (continued)

6-06. Essential Skills
Location: Salon C
Presenters: Florida Atlantic University
            Florida International University
            Portland State University
            Seattle University
            University of Northern Colorado
Moderator: Randall Spurrier, Faculty Advisor, Old Dominion University

Many students seek to obtain internships and full-time job opportunities through Beta Alpha Psi, but once they have the job, they must develop their “essential skills” in order to succeed professionally. New in 2014, each award-seeking chapter was required to hold at least one professional session on one of the following topics: business writing skills, facilitation skills, managing distractions, ethical decision making skills, negotiation skills, conflict management, or change management. Come see what these chapters did to meet this requirement.

6-07. Innovative Recruiting of Members
Location: Salon E
Presenters: Central Washington University
             Salisbury University
             Syracuse University
             The University of Tampa
             University of Central Florida
Moderator: Cheryl Westen, Faculty Advisor, Western Illinois University

Does your chapter struggle to expand its membership, let alone replace graduating members? Perhaps you haven’t established and communicated your chapter “brand” effectively. Chapters will share ideas on attracting candidates in this session. Come see what has worked for others.

6-08. CPA Exam Testing Strategies
Location: Salon B
Presenter: Valerie Wendt, Bisk CPA Review

Thinking about sitting for the CPA Exam? This session will provide you some tips on how to be prepared for exam day! Find out what to expect, what to take, what not to take, and some insight into the exam experience.
Concurrent Sessions VI (continued)

6-09. Forensic Accounting: The Fraud Busters
Location: Salon A
Presenter: Dr. Thomas Buckoff, Georgia Southern University

Demand for the “bloodhounds of bookkeeping” has been skyrocketing in the wake of high-profile corporate scandals. This session explains what forensic accountants actually do and why demand for them will continue to be strong for the foreseeable future.

6-10. Career Paths in Government/NFP
Location: Rooms 212 and 213
Presenters: Bobby Derrick, Association of Government Accountants
Natasha Schmidt, Office of the Comptroller of the Currency

More than 100,000 accountants in the U.S. work in federal government agencies, such as the General Accounting Office, the Internal Revenue Service, and the Securities and Exchange Commission. Federal employment opportunities are available at all levels. Listen to a panel of government employers discuss employment in the federal workforce and learn how to submit an application.

4. Final Awards Presentation and Closing
Location: Grand Ballroom

Awards Recognized:
- Superior Chapters, sponsored by KPMG LLP and KPMG Foundation
- Lifetime Service Award
- Project Run With It, sponsored by Moss Adams LLP
- Best Practices, sponsored by Deloitte LLP

1:15pm Conference Adjourns
Second Floor

meeting facilities

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