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**CPA Crossings**
Simplifying technology to help CPAs succeed

2018 Conference Catalog

Lively, Informative & Fun!

Executive Education, Inc.
(734) 475-0600
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New Jersey Society of CPAs

Business and Industry Conference

April 26, 2017

General Session

8:00 -8:50 AM

Leaders Eat Last

Don Minges, MBA, The Numbers Guy CFO, LLC

8:50 – 9:00 AM

Break

Breakout Sessions

9:00 AM – 10:40 AM

Working with Your Board and Audit Committee

John F. Levy, MBA, CPA, Board Advisory

Pricing for Profitability: Why Cost Matters

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

10:40 – 10:50 AM

Break

10:50 – 12:30 AM

Crowd Funding: What Every CFO Should Know

Don Minges, MBA, The Numbers Guy CFO, LLC

Black Swans: Prepare for the Unexpected

John F. Levy, MBA, CPA, Board Advisory

12:30 – 1:20 PM

Lunch

1:20 – 3:00 PM

Breakout Sessions

Communicating Financial Information to Non-Accountants

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Introvert Power: Why Quiet Leaders are Successful

Don Minges, MBA, The Numbers Guy CFO, LLC

3:00 – 3:10 PM

Break

3:10 – 4:00 PM

Panel Discussion

Most Important Skills for Financial Professionals in the Next Decade

John L. Daly, John F. Levy & Don Minges

Adjourn: 4:00 PM



Nancy Knows...



Dear Friends,

Need top-notch speakers for your industry or controller's conference? We can provide:

- Dozens of different 50 or 100-minute topics of interest to corporate financial managers in these categories:
 - Diversity and Inclusion
 - Ethics
 - Management
 - Management Accounting and Finance
 - Technology
 - Communications
- Multiple sessions presented by the same speaker or multiple speakers
- Multi-speaker panel discussions on a current financial management topic
- Breakfast or lunch keynote speakers
- Keynote speakers who can also present breakout sessions on additional topics

We have launched 37 new conference topics this year. With the depth and breadth of experience on our team, we have the capability to provide ALL of the speakers for your Controllers or Industry Conference.

This catalog will tell you about the many topics we can present.

A handwritten signature in cursive script that reads "Nancy".

Nancy J. Daly, BS, MBA, is Executive Education's Client Service Manager and is responsible for association needs. You can contact Nancy through any of the following means:

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Conference Speakers



Jeanne M. Ballew, **MA**, is founder and president of Jeanne M. Ballew Training and Development, a company dedicated to honing employee communication skills. She also owns and operates Edit Prose, a company providing editing and book coaching services to both fiction and nonfiction writers. She has trained over 25,000 people in areas such as business writing, assertive communication, presentation skills, listening skills, meeting facilitation and diversity.



Tim Cordes, **JD**, is an attorney who focuses on family law and probate administration. He is the current Secretary/Treasurer and a founding member of the LGBTQA Law Section of the State Bar of Michigan. Tim has been a member of the Stonewall Bar Association of Michigan since 2008, and served as President of the group from 2011 through 2014. As a straight ally, Tim seeks to be an advocate for the LGBT community on the issues of marriage equality and discrimination. He lives with his wife, Dana, in Bloomfield Township, Michigan.



John L. Daly, **MBA, CPA, CMA, CPIM**, is a former chief financial officer who has worked with manufacturing, health care, hospitality, wholesale and retail businesses, spending the longest part of his career as the CFO of a Tier 1 automotive parts supplier. He has lead continuing professional education seminars since 1995 and does costing and pricing consulting. John authored the book ***Pricing for Profitability***, published by Wiley & Sons, Inc.

Looks great! I wish all of my conferences could be planned this swiftly 😊

- A State Society CPE Director



Sherre L. DeMao, **CGS**, is the founder and CEO of BizGrowth, Inc., a full-service operational, marketing and strategy consulting firm that specializes in working with entrepreneurial enterprises. She is the author of *Me, Myself & Inc.*, a book that encourages readers to shift from the guilt-ridden Work/Life Balance mindset to a more effective Life Synergy approach to working and being. Her *Me, Myself & Inc.* concept is also featured in the university textbook, *Smart Start-Up Management*. Her next book, *The Profitability Quotient*, is expected to be released globally in 2018.



Jay Giannantonio, **MS, CPA, CIA**, is a management consultant specializing in finance transformation, internal audit, risk management, process improvement and Sarbanes-Oxley compliance issues. His professional experience includes long stays at Verizon/Bell Atlantic and KPMG Consulting. Most recently, he was VP – Internal Audit for a \$1B commercial equipment rental and sales company. Jay lives in the Philadelphia area.



Paul R. Harrison, **MBA, CPA, CFP®** is a veteran financial professional with industry experience in securities, financial planning, and software. Today, he teaches accounting at the University of Denver and has a CPA practice focusing on financial accounting, tax, fraud prevention and ethical management. Paul has an MBA from the University of Colorado and lives in Denver.



John H. Higgins, **CPA.CITP**, is the co-founder of CPA Crossings, LLC. John serves as a strategic technology advisor to CPAs in the planning and deployment of effective technology solutions and workflow automation. In 2015, John established CPA Crossings' new *Cloud Accounting Learning Center*, a knowledge-base of training, information and consulting services designed to help CPAs make the transformation to delivering client accounting services through the cloud.



Bud Kulesza, CMA, CFM, is former CFO of ITT Automotive, a multi-billion-dollar global company, Chairman of ITT Industries Canada and a respected leader of the accounting profession as a former Chair of the Institute of Management Accountants. Bud brings a wealth of knowledge and an entertaining high-energy style to all of his endeavors. From the boardroom to the podium, from the shop floor to the classroom, you will not soon forget his direct approach to addressing issues combining knowledge, experience and humor.



John F. Levy, MBA, CPA, is the CEO of Board Advisory, a consulting firm that assists public companies, or companies aspiring to be public, with corporate governance, compliance, financial reporting and financial strategies. He has nine years' experience with three large, national public accounting firms and has served as CFO of both public and private companies. John currently serves on the boards of three public companies, serving as vice chairman of one company and audit committee chair of another. He graduated from the Univ. of Pennsylvania's Wharton School of Business.



Don Minges, MBA, is a fractional CFO. His expertise is in profitability enhancement, strategic planning, venture capital, mergers & acquisitions, turnarounds, economic forecasting, cost accounting and financial analysis. Don has experience raising equity for several growing firms and has invested equity capital into promising businesses. He has served on the Board of Directors for many firms. He graduated with highest honors from the Fuqua School of Business at Duke.



William F. O'Brien, MBA, CPA, is a financial management consultant and educator with over 40 years' experience. He held senior financial management positions with Intel and ROLM and served as CFO for several emerging high technology companies. Bill has extensive experience in corporate planning, control, financial analysis, cash management and managerial accounting in both domestic and international settings. He has served on the faculties of Santa Clara University and San Jose State University.



Bryan L. Smith, CPA.CITP, CISA, serves as a virtual CIO to CPA firms and professional organizations. He specializes in the planning and deployment of effective technology solutions. As co-founder of CPA Crossings, Bryan focuses on helping firm leaders understand the issues and opportunities associated with deploying information technology to improve productivity, enhance client services and increase profitability.



Donna Sylver, MBA, CPA, has held CFO roles and various other financial leadership positions during her 25+ year career. Her broad range of industry experience consists of manufacturing, banking, consulting, healthcare, software, hazardous waste and communications. Named one of the 25 *Most Powerful Women in Banking* by U.S. Banker in 2005, Donna is currently CFO of Raleigh-Durham International Airport.

Your Members Appreciate Taking Executive Education Conferences

This was THE best conference I have ever attended. Every topic was relevant and the speakers were engaging.

- Edison, NJ

It was a great conference, one of the best, I will attend again next year. I left the conference knowing that I was going to use many of the ideas in the topics discussed.

- Indianapolis, IN

Conference Topics

2018 Technology Update for CFOs



John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

This session will provide a concise update of various technology trends and innovations with which CFOs should be familiar. The topics presented will include IoT (Internet of Things), 3D printing, artificial intelligence, data analytics, business intelligence and more.

3 Market Analysis Priorities to Drive Profitability



Sherre L. DeMao, CGS, SLD Unlimited Biz Growth, Inc.

If you only analyze financial statements, you are probably missing many opportunities to increase profitability and cash flow. In this session, you will learn a Profit Sizing™ process involving three key types of market analysis areas:

- 1) Business offerings;
- 2) Market segments; and
- 3) Geographic pockets

Developed through 30 years of studying entrepreneurial enterprises, this session brings new thinking around profitability that encompasses an inside-out look, leading to better strategic decisions and profits. You will walk away with an analysis tool you can immediately put to use that will improve your organization's promotional strategy, marketing concentration, price justification, operational decisions and cash flow.

4 Critical Factors to Create Sustainable Growth



Sherre L. DeMao, CGS, SLD Unlimited Biz Growth, Inc.

The world changes rapidly. If your business strategy is not built on this premise, you are already falling behind. Intelligence, emotional acumen, agility, and profitability are all critical to growth, and essential amidst constant change.

Based on validated research and best practices, this session will introduce you to a Sustainable Growth Model™ to enhance your organization's ability to grow organically through four critical success factors: 1) Intelligence Quotient (IQ); 2) Emotional Quotient (EQ); 3) Velocity Quotient (VQ); and 4) Profitability Quotient (PQ).

When all four quotients operate at high levels, you are in the best possible position for sustainable, value-building growth.

Accounting Fast and Slow: Thinking About Analysis



John F. Levy, MBA, CPA, Board Advisory

Do we really understand why we, and our companies, make the decisions? We may believe that we make decisions only after acquiring all the facts, carefully considering all the alternatives and logically choosing the best option. However, Nobel prize-winner in Economics Daniel Kahneman and his long-time collaborator Amos Tversky have proven in numerous experiments and studies that we make most decisions by intuition and not analysis. We will examine Kahneman and Tversky's groundbreaking work and its implications on us, our companies and the accounting profession.

Accounts Receivable and Payable: "Tricks of the Trade"



Virgie Ammerman, MBA, CPA, Executive Education, Inc.

The new flexible, agile accounting/finance department would be wise to review accounts receivable and payable processes. Automation has brought efficiencies, risks, and opportunities to capitalize on long time relationships and build on new ones. When was the last time you reviewed these processes and thought about ways to add value to your organization?

Achieving Strategic Success: Your Personal P-I-T Crew

William F. O'Brien, MBA, CPA, Executive Education, Inc.

Turning strategic goals into reality is as easy as 1-2-3. Learn about the three tools that can turn aspirations into achievement: Strategic Planning (P-Planning), Performance Based Management (I-Initiation) and Balanced Scorecard Reporting (T-Tracking). Discuss how to use these tools effectively as you race to achieve strategic success. This session will be useful for both financial managers in industry and public practice; the P-I-T Crew can make your department a winning team in either environment. Leave this interactive and entertaining session with the insight for transforming your financial team into your company's catalyst for strategic success.

Aligning Budgets to Strategy – The Key to Long Term Profitability



Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

In most organizations, strategic planning and budgeting are separate processes, making them out of alignment from their inception. This webinar explores a practical "real world" planning approach that aligns spending to long-term strategy, creates a culture of accountability and responsibility, and might actually be fun when everyone gets on board. The result will create a model for your organization's future growth and profitability.

A Profession of Many Hats



New

C.S. “Bud” Kulesza, CMA, CFM, Executive Education, Inc.

Professional success requires us to “wear many hats”, often seemingly unrelated to our everyday jobs. This fun-filled, motivating session provides a path to ensure career success. Bud provides anecdotes about the knowledge, skills and abilities you need to advance your career. You will enjoy this informative and memorable presentation.

Balance Sheet Management: The Least Understood Risk



New

Don Minges, MBA, The Numbers Guy CFO, LLC

Most companies manage their income statement, but many organizations virtually ignore the balance sheet until balance sheet problems create seemingly insurmountable problems. This session discusses how to analyze and manage your financial statements more holistically allowing you to identify and correct balance sheet issues early. The session will also examine several crucial ideas you can incorporate into your analyses to enhance performance and reduce risk. Every organization needs these skills!

Becoming a Great Predictor: Create Better Forecasts

John F. Levy, MBA, CPA, Board Advisory

Imagine being able to see into the future with confidence. The ability to be a great forecaster is not innate but learned. By examining great forecasters, we can learn to improve our ability to predict the future. We will examine best practices and current research to improve our ability to predict events that will affect our business.

Beyond Traditional Budgeting: Reduce Work and Improve Control

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

John F. Levy, MBA, CPA, Board Advisory

Many financial managers wage a constant struggle to keep their projections current and keep their operating managers engaged and focused on their budgets. This session will show you how to use performance metrics to reduce forecasting work and improve financial control and manager engagement in their department’s numbers.

Very exciting topic. Information was useful and personal experience made it relatable.

- Bloomington, MN

Big Data: Modern Data Analysis



John F. Levy, MBA, CPA, Board Advisory

In 1958 if you bought a hammer in a local hardware store you probably would have paid cash. The owner would know only that he sold something and had more cash than at the beginning of the day. Today if you buy a hammer from Lowe's or Home Depot you probably pay with a credit card and the stores know what kind of hammer you bought, your past purchase history, where you live and have approximations of your age, income and much more information. As accountants, we are still recording essentially the same information as in 1957, when our businesses need all the other "big data" to make the best business decisions. Are you and your company ready to benefit from big data? This session will discuss how to get started making your company smarter and more successful.

Big Data and Data Analytics - What They Are All About



John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

Unless you have been living under a rock, you have probably heard the terms 'big data' and 'data analytics' tossed around quite a bit lately. This is because they are the hottest trends in information analysis. For CPAs, the ability to unleash the power of big data and data analytics provides an unprecedented opportunity to enhance their market value. The data analytics tools are getting easier to use and more powerful. CPAs are in a prime position to be the go to professionals to help businesses use data analytics to make better business decisions. This course provides a primer on what it is all about and how to leverage it.

Black Swans: Prepare for the Unexpected

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

John F. Levy, MBA, CPA, Board Advisory

Did you ever hear the phrase, "What you don't know can't hurt you"? Nassim Nicholas Taleb, in his book *The Black Swan*, postulates that it is exactly what we don't know that can hurt us the most. The risks we need to be most concerned about are the risks we cannot identify or predict. Taleb calls these risks "Black Swans". This session will discuss some historical black swan events and, more importantly, discuss how financial professionals and their organizations can prepare for a future we cannot even envision.

John Levy is an excellent speaker/presenter....His knowledge on the topic is top-notch, he uses business examples that are relevant and his humor is refreshing.

- Indianapolis, IN

Blockchain Technology – What Every CFO Should Know



John H. Higgins, CPA.CITP, CPA Crossings, LLC
Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

Every so often, a new technology emerges that ultimately has a significant impact on accounting and finance: spreadsheet software, accounting software, cloud, etc. Blockchain technology has the potential to be the next “big thing.” It is getting a lot of attention from many of the thought leaders in the IT industry. This session will provide you with a practical and easy to understand explanation of Blockchain and the potential applications for it in accounting and finance.

Build Your Personal Net Worth



John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
Virgie Ammerman, MBA, CPA, Executive Education, Inc.

By the nature of our work and training, financial professionals are more sophisticated than the general population about their own personal finances. However, sometimes we spend so much time planning our company's future that we neglect or defer taking steps to build our own personal net worth. If you are dissatisfied with the speed that you are accumulating savings, this session will help put you on the right track. Even if you are meeting your goals, this session will provide insights and ideas that will add to and reinforce what you may already be doing.

Business Lessons from the Dance Floor: Leadership Secrets from Fred and Ginger



Don Minges, MBA, The Numbers Guy CFO, LLC

Every one of us can improve our leadership skills. This session discusses timeless leadership lessons learned from a seemingly unusual place - the dance floor. The parallels between business and dancing are striking; you need good partners, you must cooperate, someone must lead, someone must follow, you need to practice, you may step on someone else's toes, and the leader does not have to be attractive. This session examines what made Fred Astaire and Ginger Rogers, two of the most famous dancers in the world, so successful. These leadership lessons from the dance floor can help you be a more effective leader. Learn many timeless leadership lessons that successful businesses employ every day.

The session with Don Minges was very informative for me.

- Indianapolis, IN

The Business Secrets of Trappist Monks

Don Minges, MBA, The Numbers Guy CFO, LLC

"The Business Secrets of the Trappist Monks," by August Turak, has been an unconventional business best seller. What makes the Trappist Monks successful? The short answer is the monks discovered an amazing secret: "It is in our own self-interest to forget our self-interest." Just like every business, a Trappist monastery must be self-sufficient. Trappists are world famous for many products, from cheese to wool to, most famously, beer. If they do not sell their goods, they do not eat. The Trappists have learned the hard way many lessons that are effective for every business; honing their business skills for 350 years. We discuss key lessons applicable to any business.

Cash Conversion Cycle: Tools & Techniques



New

Paul R. Harrison, MBA, CPA, CFP®

How well do you understand your company's cash flows? Good cash management techniques can provide a competitive advantage! This session will show you how to effectively measure and manage your cash conversion cycle. With a more complete understanding of how cash flows through your organization, you can eliminate impediments. Better cash management lowers your borrowing costs, reduces financing needs and creates financial flexibility in your company.

Cash Management Strategies

Virgie Ammerman, MBA, CPA, Executive Education, Inc.

Cash management skills are timeless and never go out of style. This session shares strategies to get financing as well as tips and tricks to manage cash in the short and medium term. Building credibility with your bank by demonstrating a strong understanding of your cash flow needs makes you an excellent spokesperson for your business.

The Civil Advantage: Workplace Ethics and Civility

John F. Levy, MBA, CPA, Board Advisory

Ethics and civility are powerfully connected. What we call "manners" are behaviors with proven value as leadership tools to avoid destructive acts and build trust. People treasure their personal dignity, have amazingly long memories for personal slights and thrive when treated with respect. Rudeness, blustering, and bullying may win the occasional battle, but will always lose the war when it comes to lasting prestige and power. Moreover, ethical lapses are more likely if leaders do not use a civil approach to foster cooperation. This session explains how civility and ethics reinforce one another and offers 25 rules to foster considerate conduct in the workplace.

Wonderful conference with an excellent variety of topics and enjoyable presenters.

- Iowa City, IA

Closing Best Practices: Shorten Month-End

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

Surveys show that the average North American company completes its monthly financial statement closing in five days. However, some companies are able to close their books in one day or less. Many financial managers who feel pressured to shorten financial statement preparation time struggle with the balance between accuracy and speed. This session will focus on how to provide financial information faster, better and more cheaply.

Communicating Financial Information to Non-Accountants

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Do you ever get blank looks when you present your company's financial statements? Does your board nod knowingly after your presentation, but never seems to have any meaningful questions? It could be that they have no idea what you are talking about and are just pretending to understand! Learn how to connect with your CEO, board, fellow managers and team members so they understand your message. Learn to motivate them to action. Come hear a veteran CFO tell you how.

Communication Skills for Financial Managers

Jeannie M. Ballew, MS, EditProse

This session will teach you how to speak *and* listen so that you, your employees and your clients all understand each other. This presentation assists you in integrating the following skills into your communication repertoire: assertive versus aggressive statements, effective body language, open-ended questions, paraphrasing, empathy, and *artfully* ending a conversation.

Contemporary Cost Concepts: Understanding Activity-Based Costing

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Companies with poor cost information make bad decisions about products that are not "average". Companies with poor cost information allocate too much cost to easy high-volume products and far too little cost to difficult low-volume products. Activity-based costing provides common-sense techniques to understand the differences. You can take this information directly to the bottom line!

The real world examples are wonderful and extremely helpful. John was very knowledgeable and was a very good presenter.

- Manchester, NH

Corporate Finance Check-up: Renovate Your Analytical Toolbox

William F. O'Brien, MBA, CPA, Executive Education, Inc.

Understanding corporate finance is a skill that separates those who will become Chief Financial Officers from those who will always remain accountants. This session provides a refresher on corporate finance skills for those who work, or aspire to work, at the CFO level. This session reviews internal financial analysis skills and takes a fresh look at performance measurement techniques. We will also discuss how to use forecasts as a valuation tool and how to build proactive banking relationships.

Corporate Finance: Valuing a Business

Don Minges, MBA, The Numbers Guy CFO, LLC

William F. O'Brien, MBA, CPA, Executive Education, Inc.

This session discusses various business valuation methods whether for a start-up, spin-off or acquisition at any stage. Many valuation methods exist. Which method is right? Which is the 'best' for a given business? Program content includes crucial topics such as: the absolute single best metric, the Cost of Capital, the capital asset pricing model and Weighted Average Cost of Capital (WACC), Valuation methodologies (income, asset and market approaches), Discounted Cash Flow (DCF) and many more. CPAs and Corporate Financial Managers can't afford to miss this session.

COSO Update: Changing Risk Management Standards

Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

COSO provides the accounting profession's definitive risk management standards, which it continues to update and refine. The COSO guidelines provide a strong foundation for assessing and mitigating risk. The latest standards help organizations design and implement internal controls, addressing both operational and compliance objectives. Following the guidelines does not guarantee you will never have risks, but it does increase the probability you will anticipate and mitigate risks before they occur. COSO recommends organizations quickly transition their control evaluations, tools and documentation to the latest frameworks. This session shows you how.

This guy was absolutely fantastic. Down to earth, sincere, gave great and understandable examples. Relaxed, approachable. Materials excellent, organized.

- Fargo, ND

Cost of Capital: What is It and Why Should I Use It Every Day?



Don Minges, MBA, The Numbers Guy CFO, LLC

Every business needs capital, and capital has a cost. Debt and equity providers demand a return and the combination is the organization's cost of capital. This session discusses how to calculate the cost of capital, how to use it to make superior business decisions every day and some common ways organizations misuse this number.

Who should understand your organization's Cost of Capital? You do! Even if you are not yet the CFO, you need to thoroughly understand the Cost of Capital and its use. Knowing the Cost of Capital allows managers to literally "Get the biggest bang for the buck." If you want to enhance your corporate finance skills, this session is for you.

Creating Great Projections and Budgets

John F. Levy, MBA, CPA, Board Advisory

Like going to the dentist or running on a treadmill, we know our organization's budgeting process is good for us even though most of us dread the process. However, if we truly understand why budgeting is so important, it becomes both easier and less terrifying. This session will examine budgeting pitfalls, ways to avoid budget traps look at ways to improve the budgeting process through better measurement and reporting.

Creating Equity Compensation Plans

Don Minges, MBA, The Numbers Guy CFO, LLC

In today's business world, there is a talent war and the organizations with the best talent will win. There is a clear need to motivate and compensate talented personnel. Equity compensation plans are useful to retain, reward and recruit. Whether the business is large or a small start-up, developing an effective equity compensation plan is a challenge. Virtually every company that implements an equity compensation plan changes it immediately afterwards because it did not function as intended, making the most valuable employees upset, and achieving the opposite of the intended results. This session will discuss the numerous plan considerations to help you retain the key personnel who will lead your business to continued success.

A lot of audience participation and thought-provoking ideas.

- Kansas City, MO

Critical Thinking for Financial Professionals



John L. Daly, MBA, CPA, CMA, CPIM Executive Education, Inc.

What were they thinking? Why do business leaders sometimes make horrible decisions that severely damage themselves and their organizations? It is tempting to assume that a poor choice must be due to a leader's incompetence, inexperience, bad character, or low intelligence – but such easily attributed factors generally aren't the true cause when leaders blunder. In such situations, many turn to finance and accounting professionals for evaluation, answers, remedies, and solutions for improved future decision-making.

Crowd Funding: What Every CFO Should Know

Don Minges, MBA, The Numbers Guy CFO, LLC

The internet provides several new ways to raise money. These methods, called crowd funding, allow organizations to raise money through donations, pre-sales, debt and equity, often from large numbers of people. Crowd funding is getting easier due to emerging regulations the JOBS act provides. While not appropriate for all organizations, crowd funding has no shortage of success stories. However, risks, advantages, disadvantages and costs exist. This session provides a crowd funding overview for finance professionals who want to learn about this financing method, including key considerations for each crowd funding type.

Cybersecurity - Email Threats and Protection

John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

The average email user's lack of knowledge leads to gaps that cyber attackers can penetrate. They use social engineering to get us to give them access to our private information. This session will make you aware of attackers' email schemes so you can use good judgement to prevent becoming their victim. This session will improve your knowledge base in order to change your e-mail-related behavior.

Data Analysis and Management

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Virgie Ammerman, MBA, CPA, Executive Education, Inc.

Studying financial results can tell us *what* business activities need improvement, but often leaves little insight into *how* to improve. To improve our organization's bottom line, we must learn ways to increase revenue or decrease cost. This comes from gaining new insights about customers, products and processes. Learn more about how to gather and interpret non-financial data.

Presenters were very good. They were able to hold the group's attention, even in more technical areas of the discussion.

Indianapolis, IN

Debt or Equity - Which Will Your Organization Need Next?



New

Don Minges, MBA, The Numbers Guy CFO, LLC

Your organization needs capital and there are numerous financing alternatives. How do you choose whether to raise debt or equity? What are the key considerations and the advantages of each?

This session will provide real examples and detail the process to decide between debt and equity. Why would one be a better choice today and the other be a better choice tomorrow? If you want to enhance your corporate finance skills, this session is for you.

Doing More With Less

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Do you have too much to do and not enough time to do it? Running efficient accounting and finance functions is not rocket science, but it does require that you get the simple things right. This session covers issues that you may not have thought about but can deeply affect your financial department's operations.

Double Your Impact & Cut Your Writing Time in Half

Jeannie M. Ballew, MS, EditProse



New

American businesses report losing \$1 billion a year to unclear writing that wastes time, kills contracts and turns off customers. Optimize your time spent in communications as a writer and a reader. Prevent your readers from sending your documents to the circular file because they are too much work to decipher. Write with clear purpose and enjoy the results and time saved. Be part of the solution, not part of the problem – learn to write it right the first time.

Driving Performance with Metrics

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

Do you struggle to keep budgets current in the face of an ever-changing business climate? Do you recognize that last year's actual spending can be far from what a department's spending *should* be? Twenty-first century performance metrics reduce work, reduce politics, provide flexibility and substantially improve the performance management process. This valuable session will show you how to drive organizational performance using these powerful techniques.

Jay did an excellent job in presenting and discussing this material. He also contributed several points from his personal experience, which added to the appreciation of the subject matter.

- Indianapolis, IN

Effective Networking: Energize Your Career



New

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.
Sherre L. DeMao, CGS, SLD Unlimited Biz Growth, Inc.

It is not who you know, but who knows you. You land jobs, win clients, make sales and get promotions based on your visibility within your company, industry and business community. According to several studies, people find 70-75% of all new jobs through networking. Despite knowing that we should network, the prospect of talking to other people in a room full of total strangers or making new phone contacts may terrify us.

The unknowns scare us most of all. This session will help you get the courage to network by preparing you for that phone contact or networking event. We will talk about what to say, how to say it and why you will do your most effective networking when you listen a lot more than you talk. The skills from this session can put you on the path to networking like an expert.

Excel – Best Practices Before Final Save



New

John H. Higgins, CPA.CITP, CPA Crossings, LLC
Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

This Excel course will provide an overview of all the functionality that supports the formatting and printing of spreadsheets in Excel. Using cell styles and conditional formatting, you will learn how to create spreadsheets that are visually appealing and understandable to a non-financial audience. Topics reviewed in this course include printing multiple spreadsheets, embedding Excel ranges into Word documents, cell formatting, custom cell styles, conditional formatting options, Page Layout tab, print dialogue options, converting spreadsheets to PDF, and securing spreadsheets.

Excel - Create KPI Dashboards for Maximum Impact

John H. Higgins, CPA.CITP, CPA Crossings, LLC
Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

Most accountants use Excel to help them make decisions about their data, but find it difficult to deal with large information volumes. This session covers how to build robust dashboards for analyzing key metrics in Excel.

We will begin with dashboard design guidelines and then work through importing data, setting up calculated fields and columns, and creating dashboard key performance indicators (KPIs). We will also show how to make your dashboards easily understood by adding charts and eye-catching visuals using Power View.

Very dynamic. Kept me engaged during entire presentation. Very relevant examples.

- Minneapolis, MN

Excel – Using PivotTables for Data Analysis

New

John H. Higgins, CPA.CITP, CPA Crossings, LLC
Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC

Excel is the #1 data analysis tool for accountants. Yet many accountants have never learned the basics of data analysis using Excel or the tools that Excel offers to help with data analysis. This session will teach participants the importance of PivotTables for analyzing data. We will demonstrate how PivotTables can make analyzing data an easy task for all accountants. Participants will learn the systematic process to create PivotTables and PivotCharts. We will also cover all the setup options and features.

Explaining Variances to Your Management Team

New

C.S. “Bud” Kulesza, CMA, CFM, Executive Education, Inc.

Your Board, CEO and management team want answers when results do not turn out as everyone planned. The explanation may involve a complicated variance analysis that non-accountants may find difficult to understand. This session provides insight into how to explain these concepts clearly, concisely and visually so that everyone can understand and deal with the issues that challenge your organization.

Finance and Innovation: Reinvent Your Department and Your Company

John F. Levy, MBA, CPA, Board Advisory

How can so many great companies lose their way and fall into a steep decline or even disappear? Once very successful and profitable companies are now a ghost of their former glory or names we can barely remember. This explores how companies succeed through innovation and fail because they are unable to deal with the next wave of innovation. More importantly, we will discuss how you, your department and your organization can profit from being more innovative.

Financial Analysis: EVA and the Altman-Z Score

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

John F. Levy, MBA, CPA, Board Advisory

Don Minges, MBA, The Numbers Guy CFO, LLC

Do you want to brush up your financial analysis skills? This session focuses on two sophisticated analysis tools – EVA and the Altman-Z Score. EVA is the most accepted financial metric used by boards to evaluate the CEO and management team. Companies commonly use the Altman-Z Score to evaluate credit risk. Understand why these metrics might belong in your analytical toolbox.

Very informative presentation and engaging.

- Kansas City, MO

Financial Statement Shenanigans: Prevent Them from Fooling You!

Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

Senior management yearns to report positive news and impressive financial results that will please investors and bankers while driving value higher. Though most companies act ethically and follow prescribed accounting rules, some take advantage of gray areas in the rules or ignore them altogether in order to portray financial results in a misleading way. This session will discuss some common financial statement shenanigans to help prevent them from fooling you.

Find Your Strengths

Virgie Ammerman, MBA, CPA, CITP, Executive Education, Inc.

Gone are the days of personality testing geared to 'fix' our weaknesses. Welcome to the art of capitalizing your strengths and improving your career and the careers of those around you! This session will help you identify your strengths and embrace them. We will also help you identify strengths in others and use this information to build stronger teams designed to problem solve and build forward momentum!

Five Marvelous Business Books in 100 Minutes

Don Minges, MBA, The Numbers Guy CFO, LLC

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

You know you should read some business books, but finding time is often hard to do. Come get a 20-minute executive summary of five business books. This session makes it easy to catch up with the latest thinking in five very different topics. We change the mix all the time. Recent sessions have included **Leaders Eat Last**, **Zero to One**, **American Icon**, **Slide:ology**, **Brain Rules** and **Snakes in Suits: When Psychopaths Go to Work**. Save time, learn the key lessons of five business books in just 100 minutes.

The Five Dysfunctions of a Team

Don Minges, MBA, The Numbers Guy CFO, LLC

What are the issues and symptoms of poor performing teams? How do we correct the root causes and what can we do to improve performance? This session discusses **The Five Dysfunctions of a Team** by Patrick Lencioni and will allow you to recognize when a workgroup is not living up to its full potential.

Very good speaker/discussion leader. I really appreciate that you guys provide topics that are on point for industry professionals. Keep it up!!!

- Greenville, SC

Fraud Alert! Loss Prevention and Control

William F. O'Brien, MBA, CPA, Executive Education, Inc.

Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

Fraud Alert! is one session you cannot afford to miss. Fraud will affect you in some manner; prepare for the inevitable. A study by the Association of Certified Fraud Examiners estimated fraud costs the world economy in excess of \$3.5 trillion per year (the equivalent of \$4,500 per employee). This same study estimated the course of normal audits discovers only about 11% of frauds versus approximately 19% discovered by accident. This session will examine various types of frauds and discuss ways to prevent, detect and investigate these activities.

Generations at Work: Finding Common Ground

Virgie Ammerman, MBA, CPA, Executive Education, Inc.

William F. O'Brien, MBA, CPA, Executive Education, Inc.

The dynamics of today's workforce ARE changing. Gone are the days when managers spent years working their way up the company's ladder. Because of the relatively small population of Generation Xers, leadership is transitioning many management positions from Baby Boomers to Millennials. The result is a greater age difference between colleagues.

This session explores the differences between the generations who make up the current workforce and the implications, both positive and negative, of the gap. We will explain why finding common ground is crucial to survival, and how to accomplish it. Receive practical tips and tricks to manage multiple generations in our work places.

Getting the Most from Your Information Systems

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Virgie Ammerman, MBA, CPA, Executive Education, Inc.

Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

Are your information systems working for you or are you working for your information systems? Your information systems can make your job go smoothly or make your life miserable. In which world would you rather work?

This session provides insights into selecting, installing and using information systems. Even if new software is not in your future, this session will give you insights into improving your current systems, making them far easier to use.

John Daly was excellent! I hope he will be returning next year.

- Atlanta, GA

Heartfelt Leadership: How Ethical Leaders Build Trusting Organizations

John F. Levy, MBA, CPA, Board Advisory

Leaders provide the culture, environment, values and incentives that foster and encourage change. Most importantly, great leaders create environments of trust that allow employees to challenge, innovate and work as teams. In a rapidly changing world, heartfelt leaders build great organizations. Understand the qualities of a great leader and find out how you can become a great and heartfelt leader no matter your title or place in an organization.

Improve Teamwork

Don Minges, MBA, The Numbers Guy CFO, LLC

Teamwork is something that every leader wants, but not necessarily something that comes easily. Learn how to set and communicate goals that motivate your team. Find out how to get members to work for the greater good rather than their own personal goals. Seamlessly manage both the team and its individual members. Popular speaker Don Minges tells how you can get your team working toward the same goals.

Innovation and the CFO

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

The world sometimes changes very quickly, but many organizations and their finance departments are far behind in adapting practices that business experts have considered best practices for decades. This session will talk about how to keep your company and department in step with the best instead of far behind.

Introduction to Data Analytics and Microsoft Power BI Tools

John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC



Excel is the #1 data analysis tool for accountants. Yet most accountants have never learned the basics of data analysis using Excel or the tools that Excel offers to help in this area. Those that learned to analyze data using PivotTables, soon learned there were many weaknesses in PivotTables that resulted in elaborate calculations in order to perform simple tasks.

In this session, we will provide an overview of the various PowerBI tools and discuss Microsoft's PowerBI Strategy. We will begin by explaining the challenges faced by many accountants when it comes to analyzing data in Excel. You will learn how each PowerBI tool reduces the challenges and improves your data analytic skills. You will also gain a complete understanding of when to use which tool.

Introvert Power: Why Quiet Leaders are Successful

Don Minges, MBA, The Numbers Guy CFO, LLC

Leaders were once chosen for their character but today we live in an age where loudmouthed extroverts seem to take center stage in everything, including business, politics and entertainment. While the talkative, charismatic leader makes the front page of business magazines, recent research shows that successful business leaders tend to be more reserved, pensive and sometimes outright shy. Learn why your desire to spend significant time inside your own head may be your greatest asset.

Keys to the Balanced Scorecard: Keep Success on Track

Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

An introduction and overview of the Balanced Scorecard aimed at executives and financial managers who want or need to understand the principles of the Balanced Scorecard and how it works in practical terms.

Know Your Cost – Double Your Profit

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Companies with poor cost information make bad decisions about products that are not “average”. Poor information causes companies to overprice easy, high-volume “gravy” products and underprice difficult, low-volume “dog” products. Regardless of whether your company sells goods or services, learn how to double your profit by giving the dogs to your competitor and keep the gravy for yourself

Leaders Eat Last

Don Minges, MBA, The Numbers Guy CFO, LLC

Trust is essential, because without trust, there can be no teamwork. Trust is like oxygen, when it is gone - we suffocate. This session provides a 15-step action plan to gain commitment from your team members, build trust, hold each person accountable and create results for your organization.

Leadership and Teamwork

Don Minges, MBA, The Numbers Guy CFO, LLC

What are the key duties and attributes of a true leader? What should a good leader do to improve teamwork? Learn how leading effectively will improve your whole department's performance.

The discussion leader was outstanding – actually one of the best.

- Indianapolis, IN

Leadership by the Numbers



C.S. “Bud” Kulesza, CMA, CFM, Executive Education, Inc.

Many people’s memoirs have included lists of advice for anyone who aspires to a leadership position. This entertaining and informative session compares these lists and looks for common themes that can provide important lessons for anyone who has, or aspires to have, a leadership role in their organization.

Lean Accounting: Doing More With Less

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Many accounting departments generate volumes of information that are of little use to anyone. Lean Accounting begins with examining user needs and focusing effort on the financial management activities that provide real value to the organization. Come hear how to improve accounting processes while reducing effort required.

Lessons from the Playing Field: What Sports Can Teach Accountants

John F. Levy, MBA, CPA, Board Advisory

The Duke of Wellington is credited with saying, “*The Battle of Waterloo was won on the playing-fields of Eton.*” From before the 19th Century to today, sports have molded our business and professional leaders. Sports can teach today’s accountants about many critical business issues, including strategy, culture, metrics, management, innovation, adversity and sustainability. This session explores lessons we can all use from great, and not so great, moments in sports. Quit feeling guilty about playing those extra nine holes or watching “March Madness” – you are learning important professional skills!

LGBT Employees and their Families: What Every Manager Should Know



Tim Cordes, JD, Cordes Law

People with differing sexual orientations and gender identities have always worked among us. Until relatively recently, our lesbian, gay, bisexual and transgendered colleagues may have hidden their private lives from management and co-workers fearing possible repercussions. With increasing social acceptance and legal protections, many of our LGBT colleagues are no longer hiding their true selves in the workplace. Changes in the law now allow gay and lesbian couples to form families, creating new issues that employers and supervisors must understand. This session will help you become aware of the terminology and issues of managing in a diverse workplace that includes members of the LGBT community.

Making Predictions: Plan for the Future

John F. Levy, MBA, CPA, Board Advisory

We all make predictions in our personal and professional lives. We base our decisions to marry, buy a house, launch a new product or hire staff on expectations about the future. In the past few years, research into improving predictions has advanced. We will look at this research and current best practices in forecasting to help us prepare better budgets and projections.

Measuring and Reporting on Sustainability

John F. Levy, MBA, CPA, Board Advisory

Accountants are ideally suited to *measure* sustainability efforts because we collect and analyze our organizations' information. Until we can adequately measure sustainability efforts and their returns in terms of time and money, many businesses will not fully embrace sustainability. Accountants should lead efforts to *report* on sustainability because we have the experience and knowledge to create clear, concise and informative documents. This session reviews the challenges in measuring and reporting sustainability efforts, discusses current best practices and provides thoughts about the future of sustainability measurement and reporting.

MS Word: Advanced Features

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Financial professionals are often Excel experts but are unaware of MS Word tools that can save time and make their written communications considerably more professional looking and easier to read. This session covers tools you have probably never used and others you may not be using correctly. Your whole department could use this course!

Negotiating with Your Banker: Get the Best Deal

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

John F. Levy, MBA, CPA, Board Advisory

Don Minges, MBA, CPA, The Numbers Guy CFO, LLC



Some CFOs think that your banker's proposal is a "take it or leave it" proposition. We can negotiate banking relationships just as we would with any other vendor. This session will discuss how to tell your organization's story, why you should regularly communicate with multiple banks, and how to put yourself in the strongest possible bargaining position. Issues discussed include loan terms, interest rates, covenants, and owner guarantees. If your organization needs bank financing, this session is for you.

My takeaways were lots of the leadership ideas I learned today.

- Indianapolis, IN

Nonprofit Boards: Step Up to Today's Challenges

John F. Levy, MBA, CPA, Board Advisory

The days when nonprofit boards were essentially a benign supportive group are fading. Heightened expectations for corporate governance quality and visibility have changed the composition and emphasis of nonprofit boards nationwide. This session focuses on how to understand, advise and help nonprofit boards meet their critical governance responsibilities. You will:

- Become acquainted with board responsibilities, needs, and challenges
- Learn about competencies needed on nonprofit boards
- Examine the current state of nonprofits and the implications for board activities
- Find out what board members must know about serving as a board member

Office 365 Software Applications Lightning Round

John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC



At last count, there were over 20 unique applications available in the Office 365 bundle. These range from the traditional Office desktop applications such as Excel, PowerPoint, Word, etc., to a whole new generation of cloud-based applications such as OneDrive, SharePoint, Yammer, Delve and more. These newer cloud-based applications will help you transform to a digital business model. This session will provide a high-level review of all the core Office 365 cloud applications so you can assess the strategic potential for your organization.

OneNote – Mastering Organization of Your Notes & Correspondence

John H. Higgins, CPA.CITP, CPA Crossings, LLC

Bryan L. Smith, CPA.CITP, CISA, CPA Crossings, LLC



OneNote is rapidly becoming one of the most popular applications in the Microsoft Office and Office 365 product suites. The reason for this becomes evident when you learn about all you can do with OneNote to record and manage notes, to do lists, meeting agendas and much, much more. This session reviews all the features OneNote offers and examines how to apply them.

I really enjoyed the sports analogy as it relates to business. A completely fresh approach...John did a fantastic job of relating all of the course work to the real world. I have multiple take-aways...very thought provoking.

- Greenville, SC

Open Book Management: Making it Work in the Real World



John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Some organizations create extraordinary success by broadly sharing financial information with team members at all levels. Others have tried and failed. This session discusses how real-world organizations have transformed their cultures using open book management. You will gain insight into what works and what does not, learning how giving team members a stake in the action can motivate everyone to create company performance far beyond anyone's expectations.

The NOT Not for Profit: Run Your Organization like a Business



John F. Levy, MBA, CPA, Board Advisory

Successful not-for-profit organizations run on passion, drive and creativity. However, successful not-for-profits also need to plan properly, allocate resources efficiently and report tangible results to stakeholders. The best not-for-profits use the same business principles that create the most successful companies to achieve their goals. We will examine how your not-for-profit can benefit from key principles that drive the world's most profitable businesses.

Performance Analysis: Identifying Profit Improvement Opportunities

William F. O'Brien, MBA, CPA, Executive Education, Inc.

Jay Giannantonio, MS, CPA, CIA, Executive Education, Inc.

Discover ways to make your company more profitable! This fast-paced session will teach you how to use operational auditing and performance improvement techniques to identify and implement cost saving operating controls and processes. Based on the principles of COSO's Internal Control Framework and standards of the Institute of Internal Auditors, this session will make the experienced financial manager and the professional operational auditor more efficient and value-added in their respective fields.

Powerful Presentation Skills



Jeanne M. Ballew, MS, EditProse

This session will provide you with the essentials of how to prepare and deliver a dynamic presentation that will not only engage your audience but also enable them to remember your key points. This presentation uses a combination of lecture, discussion and group activities to provide you with a quick, practical approach to organize your key points and format your visuals for maximum impact. It also covers the basics of effective delivery such as body language, vocals, and word choice.

The Power of “Why”

William F. O’Brien, MBA, CPA, Executive Education, Inc.

Today’s business leaders need to understand more than simply the financial impact of operations. They need to understand “why” these outcomes occur. Only by understanding the causes can you develop the appropriate actions for improved results. Learn how to understand the root causes of your financial performance. Discover how to use the “5 Whys Method” of root cause identification. Explore how to use these root causes in creating actionable reports.

Successful financial managers know how to “Connect the Dots”. Put the “Power of Why” in your analytical toolbox! Start connecting today!

Prepare for a CFO Role

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Many accountants spend their early career trying to develop technical skills, yet a surprising proportion of public company Chief Financial Officers don't even have an accounting degree. What does it take to become a CFO and be successful once you get there? Whether you are early or late in your career, this session will provide valuable insights. Come hear stories of a real world CFO's successes and failures.

Pricing for Profitability: Why Cost Matters

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Three things can happen in pricing, and two of them are bad. Overpriced products are a missed opportunity, whereas underpriced products give away your products at a loss. When sales and accounting personnel fail to work together, the company risks becoming its industry’s “dumb” competitor. Accountants involved in pricing can help the company understand the difference between “dog” and “gravy” opportunities with knowledge that directly translates into often vastly improved profitability. You will leave this session understanding why the company with the best cost information wins!

Principled Negotiations: Getting to Yes

John F. Levy, MBA, CPA, Board Advisory

According to negotiation guru Chester Karrass, *“In business as in life, you don’t get what you deserve, you get what you negotiate.”* Every transaction between two individuals is a negotiation. Often we view negotiations as a competition with one side “winning” and the other “losing.” **Principled negotiation** is a better method that seeks to have both parties come out ahead. This session will examine best negotiation practices, providing participants with ways to “get to yes” faster and build lasting relationships.

Private Company Accounting: More Changes on the Financial Reporting Horizon

William F. O'Brien, MBA, CPA, Executive Education, Inc.

Accounting in the United States has changed forever. While most financial professionals are aware of International Financial Reporting Standards' (IFRS) effect on public companies, many are not sensitive to the numerous accounting standard choices available to private companies. This session focuses on how these choices will affect YOU. You cannot afford to miss this critical, entertaining and interactive session.

Profit Improvement: Ten Tips

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Don Minges, MBA, The Numbers Guy CFO, LLC

When a company experiences poor financial performance, the financial person is often the first to go. Whether times are good or bad, asking the tough questions and making sure the organization is efficient and stays efficient are part of the financial manager's job. Proactive efforts by financial management can prevent the need to "catch up." This session provides 10 techniques for improving your company's bottom line.

Protect Yourself: Legal Responsibilities of Directors

John F. Levy, MBA, CPA, Board Advisory

The 21st century's first years have seen unprecedented changes in the roles and demands on our corporate and nonprofit directors. Board members now cope with ever-fuller agendas, greater potential liability, and increasing demands by shareholders, regulators, activists and the government. How should directors respond to these new challenges and how can they protect themselves in a progressively litigious environment? This session discusses directors' legal responsibilities, with particular emphasis on audit committee and the audit committee financial expert responsibilities.

Protecting Your Company From Fraud

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

William F. O'Brien, MBA, CPA, Executive Education, Inc.

Fraud affects almost every company eventually. Insiders perpetrate most fraud, often continuing for years without detection. Most organization's change their systems after detecting a fraud. Why not consider changes now that could prevent a considerable loss. This session will provide insights, which could save your organization a lot of money!

I really enjoyed the process improvement sessions by Bill. I think more avenues like this are good for these sessions/conferences.

- Iowa City, IA

Raising Financing



Don Minges, MBA, The Numbers Guy CFO, LLC

This session reviews proven methods to raise capital and discusses new methods to raise financing such as Crowdfunding. What are the pros, cons, and sources for each type of financing? What do banks require when you borrow? What do equity investors look for when analyzing making an equity investment? What are the fundraising techniques that small enterprises commonly use that established businesses can now use? How do you present the request for capital to increase your chances for success? If you are involved with raising capital, this material is essential.

Reinventing the Finance Role



John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

When everything you must accomplish seems overwhelming, it is often hard to see the big picture. Step back and understand your role as others do. Your board, CEO, peers and the rest of the organization are customers for the information you create. Understanding their perspective will change how you gather, process and distribute information. It will change your focus from dealing with the past to collaborating with others to make the future happen. As a result, you will work more efficiently and will be far more valued. This session will help stimulate your way of thinking about your own position and the department you run.

Resolving Ethical Conflicts

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

At some point in his or her career, every financial manager will face the choice of doing the right thing or taking the easy way out. Skillful handling of an ethical conflict can make a big difference in your career's trajectory.

This session discusses:

- Standards and techniques for resolving ethical conflicts
- How to have a conversation about a tough issue and still keep your job
- What to do when talking fails

This session could save your job and your career!

Revenue Recognition and Lease Accounting: Changes Coming Soon!

William F. O'Brien, MBA, CPA, Executive Education, Inc.

FASB has issued new standards for revenue and lease accounting that will go into effect soon. Some companies will have major revenue recognition changes. Two types of leases remain, each with their own unique accounting treatment, but the old operating lease concept has disappeared. This session will help you become prepared for the reporting changes that await you in the near future.

Risk Analysis and Management

William F. O'Brien, MBA, CPA, Executive Education, Inc.

In this turbulent world, risk management responsibility has fallen squarely on financial management's shoulders. Audit committees and external auditors are asking questions they never asked before. We must prepare to give them answers! Come get insights about Enterprise Risk Management (ERM) and what standards such as the COSO ERM model say every organization must do.

The Rittenhouse Rankings: Cut Through Financial Reporting's FOG

John F. Levy, MBA, CPA, Board Advisory

Is that financial report you are reading honest and candid, or are the real facts hidden among carefully chosen "weasel words"? Learn about how the Rittenhouse model measures the integrity of management's disclosures about financial results. Prevent misleading disclosures from fooling you.

Selling Your Business: What You Need to Know

John F. Levy, MBA, CPA, Board Advisory

Baby boomer aging has created an unprecedented increase in businesses offered for sale and this number will only continue to grow. In this demanding market, how do sellers get not only the best price but also the right terms and consideration? This session will examine the many reasons to sell, potential buyers, alternative forms of consideration, the structure of transactions, some legal matters and the team needed to maximize the price and protect sellers.



Speak So They Listen!

Jeanne M. Ballew, MS, EditProse

As a financial manager of the 21st century, you *cannot* build working relationships without effective communication! You must be able to translate abstract data into concrete language in order to drive profits and add value. Effective communication of complex ideas is crucial—not only to boards, audit committees and stakeholders—but to line managers, sales people and other team members. Most importantly, you must be able to communicate effectively with your clients and customers, or you risk the very lifeblood of your business. This session provides ideas that will help both your business and career.

Staff Retention: Attract and Keep the Best People

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Virgie Ammerman, MBA, CPA, 180 Medical Billing Services, LLC

Does it seem like you spend far too much time recruiting? Do your people leave just as they become productive? If you think your turnover is because Millennials are different from earlier generations, you probably are not looking at the real source of your problem. Learn the changes you should make now!

Teamwork – Create a Cohesive Team

Don Minges, MBA, The Numbers Guy CFO, LLC

Why do some teams produce and win, while other teams fail? What do the leaders of great teams do that make the team a success? Whether you run the executive staff of a multinational company, a small department within a large organization or even if you are a team member in a team that needs improvement, we will share proven techniques to enhance teamwork. It is not complicated to build a team, but it is difficult.

Teamwork is the ultimate competitive advantage both because it is so powerful and rare. “If you could get all the people in the organization pulling in the same direction, you could dominate any industry, in any market, against any competition, at any time” says Patrick Lencioni, the author of the book, *The Five Dysfunctions of a Team*. This seminar contains research from this book, which most business schools use today.

Tell Me a Story



William F. O'Brien, MBA, CPA, Executive Education, Inc.

Everyone enjoys a good story. Stories create mental pictures, stimulate critical thinking and provide concrete examples of theoretical concepts. Learn to become a memorable speaker who can move, motivate and lead others through the craft of storytelling. Don't just simply relay your financial results. Discover how to mesmerize your company's audiences in a way that makes it easy for them to come away motivated for action that can improve their bottom-line. Remember, if the audience didn't get the message, you probably delivered it in an unmemorable way! Boost your business communication effectiveness through the medium of storytelling.

Time Hacks: Proven Ways to Save Time, Money and Get More for Less

Don Minges, MBA, The Numbers Guy CFO, LLC

Are you in a rush? Behind at the office? Have too many emails in your inbox? If you are trying to catch up, or just want some free time to relax, this session is perfect for you. We will share dozens of proven techniques, tricks and tips that can immediately save you time, trouble and money. Prepare to take lots of notes!

Top Ten Business Myths: Avoid these Errors!



Don Minges, MBA, The Numbers Guy CFO, LLC

This session discusses ten of the most problematic myths, mistakes, risks, and hidden landmines inherent in every business. We will learn from the mistakes of others who often paid a steep price so that we can learn valuable lessons. If you are a leader who wants your business to become even more successful, this session is for you.

Twisted Ethics: Dealing with Snakes in Suits

John L. Daly, MBA, CPA, CMA, CPIM, Executive Education, Inc.

Good people believe everyone else is just like them. They cannot imagine someone could con them or their company while having no guilt or remorse about what they did. Lack of guilt and empathy are key traits of a psychopath. Experts estimate that one out of 25 corporate executives are psychopaths who may initially appear to be more normal than the rest of us. Psychopaths may present a convincing picture of virtue while helping themselves to money, status and sex, leaving a path of shattered expectations, empty wallets, and broken hearts in their wake. Learn how to recognize and deal with others who have no conscience.

This was very informative. Absolutely fantastic. I would love to see John Daly back again next year.

- Bloomington, MN

Working with Your Board and Audit Committee

John F. Levy, MBA, CPA, Board Advisory

The relationship between the CFO, the Board of Directors and the Audit Committee has changed forever. The Board is looking to the CFO and the finance and accounting department for more – more integrity, more honesty, more information and more strategic analysis. How do you meet these challenges? Your Board and Audit Committee are now better qualified and more independent. How do you tap into the knowledge and experience of your audit committee members? Veteran director and public company CFO, John F. Levy, will explain how to communicate effectively with your Board and Audit Committee and how to use them as competitive assets.

Here's What Participants Have to Say

The collection of topics and the speakers were outstanding. Their subject matter thorough, presentation skills sharp, one of the more enjoyable/valuable CPE days.

- Indianapolis, IN

Wonderful speaker, interesting facts!

- Novi, MI

Very helpful tips and information that can be used daily.

- Kansas City, KS

Wide variety of interesting topics. Good value.

- Indianapolis, IN

Loved the stories – lots of good practical advice.

- Fargo, ND

He was excellent! One of the best conference speakers I've heard.

- Portland, OR

He really involved the audience so it kept your attention.

- Atlanta, GA

Likely the best presenter I've heard at any MACPA conference. I will try to attend every one of his sessions.

- Novi, MI

I found this session interesting. Speaker...kept my interest for the entire session.

- Atlanta, GA

Topics of sessions blended well together.

- Indianapolis, IN

Executive Education, Inc. has a number of interesting topics and has excellent presenters.

- West Columbia, SC

Content was spot on and useful in actual work performance.

- Charlotte, NC

The instructor was simply outstanding as was the course. I would highly recommend it to others and will look for other courses by this instructor.

- Indianapolis, IN

Excellent and captivating presenter with tremendous relevant and practical senior management experience.

- Troy, MI



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