



International

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2008 Information Technology Conference

Sunday, Sept. 21 - Tuesday, Sept. 23

The Westin O'Hare

6100 North River Road • Chicago, IL • 60018 USA

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DRAFT AGENDA

Pre-Conference Fun – Saturday, Sept. 20, Dan & Liz Harris' home, Wrigleyville area of Chicago

4 – 8 p.m. **Private BBQ**, Spouses welcome.

8 p.m. - ? **Chicago Blues Experience**. Spouses welcome.

(Pre-register on Conference Registration Form.)

Sunday, Sept. 21

3:00 – 3:30 p.m. Opening Remarks

3:30 – 5:30 p.m. **Communicating with Clients SECURELY** (2 CPE Hours)

Moderators: **Dan Harris**, enterpret.co & **Barry MacQuarrie**, Kirkland Albrecht & Fredrickson, P.C.

Given the confidential nature of almost ALL communications with our clients, what strategies are firms using and/or are available for making sure these communications are, in fact, confidential? That is, how does your firm secure outbound information so that only your client can read it. What options does your firm offer so that your client can send things to you in a secure manner? Context for this session: Email is **LESS SECURE** than a postcard! Through a survey of members, we'll present the various solutions being used today. We'll also describe several other solutions on the market,

5:30 – 6:30 p.m. **Welcome Reception @ Westin O'Hare**

6:30 – 8:00 p.m. **Optional Tour of en-terpret.co Data Center** (**Pre-register on Conference Registration Form.**)

en-terpret.co Data Center is a secure facility where a variety of services to are offered to clients and JHI members.

Monday, Sept. 22

7:30 – 8:30 a.m. **Breakfast**

8:30 – 10:10 a.m. **Protecting Data** (4 CPE Hours)

Moderators: **Laurie Pemrick**, McCrory & McDowell LLC &

Melodie Anderson, Morgan & Company

Cyclical Data Protection

Sure, we back up data, we set up firewalls and we change our passwords, but are we effectively managing our organizational data throughout its life? Are we protecting our clients, their employees and our own data efficiently, effectively and in its entirety? Is your data classified according to risk? Does your state have an act in effect similar to the Breach of Personal Information Notification Act? How do you protect yourself? This session will cover tools you can use including checklists to assess your internal controls. It will help your organization ask the important questions (who, what, when, where and how) of data protection so that you can tailor a plan of attack dealing with each of these issues.

10:10 – 10:30 a.m. **Break**

10:30 a.m. – 12:10 p.m. **Protecting Data** (Continued)

12:10 – 1:30 p.m. **Lunch**

12:40 – 1:30 p.m. **Lunch Presentation: CCH Vision of the Future** (1 CPE Hour)

1:30 – 3:20 p.m. **VISTA and Office 2007: A New Vista for the Enterprise** (2 CPE Hours)

Moderator: **Chris Coart**, RBZ, LLP. **CCH, a Wolters Kluwer business**, participating

Is Microsoft Vista ready for prime time? The workhorse of the Enterprise, Windows XP Professional has officially reached its end-of-life and is no longer sold by Microsoft. But is Vista really ready to take XP's place as a production platform? The wait for that milestone of reliability – Service Pack 1 – is over and now it's time to take a serious look at Vista. We kick the tires of this rebuilt and re-tooled Operating System, examine its new heightened security, including the User Access Control layer, and consider the advantages of its 64-bit operating system option. Then we look under the hood to take a serious stare at Vista's requirements, vital compatibilities and important incompatibilities, including Office 2007, as well as the lessons of the "Vista Capable" lawsuit and other late-breaking news. Then we see exactly how it fits into production network, and what has to change to make that work.

3:20 – 3:40 p.m. **Break**

3:40 – 5:10 p.m. **Telephony** (2 CPE Hours)

Guest Speaker: **Josh Robbins**, Managing Partner, Geckotech, a leading Chicago hosted IP telephony provider

Moderators: **Brandon Bowers**, Berkovits & Company, LLP & **Dan Harris**, en-terpret.co

What's the tool your staff use the most to perform client work and deliver information? Most would say computers and software. If that's true, your **TELEPHONE SYSTEM** would run a close second. So, how come that system is over 10 years old, out of support, obsolete and no longer economically expandable? This session will explore the technologies available to maximize voice communication and make your people more efficient. We'll cover the pitfalls of older pbx and key systems, how to consider and budget for replacement technology, the economics of Voice-over-IP technology, new features and capabilities your firm should not be without and more. What's coming in telecom – should you be thinking "Video?" How can someone working at home pick up their extension when you ring? Learn about a new option: hosted telephony for your firm...making the equipment and its support someone else's problem.

5:15 – 5:30 p.m. **Wrap-Up Discussion**

6:00 p.m. – ? **The Famous IT Conference Dutch-Treat Dinner Soirée**, Carlucci's Restaurant

Tuesday, Sept. 23

8:00 – 9:00 a.m. **Breakfast**

9:00 – 10:40 a.m. **Roundtable Discussion on Next Year's Initiatives** (2 CPE Hours)

What initiatives are firms considering, budgeting for and/or wishing about for the coming year (2009)? Software upgrades? Servers? Operating Systems? Network Infrastructure? Phones systems? Access Control systems for the physical office? By coordinating and leveraging expertise, the JHI IT Group can make next year better and more efficient for each of us.

10:40 – 11:00 a.m. **Break**

11:00 a.m. – 12:40 p.m. **Breakouts: U.S. & Canadian Issues – Audit Software, Tax Software, etc.**

(2 CPE Hours)

Moderators: **Blair Davidson**, McCay, Duff & Company LLP & **TBA**

12:40 – 2:00 p.m. **Working Lunch: Facilitated Discussion on 2009 Conference**

2:00 – 4:00 p.m. **Sharepoint for Internal and External Portals**

Moderators: **TBA**

Sharepoint is a product and a concept that has the potential to transform how firms move information and improve collaboration. It provides a central place where information can be posted or people can "converse." Externally, it can be used for marketing/communications and (secure) conversations with clients. In this session, we will see how several firms are using Sharepoint and discuss options and techniques for gaining the maximum benefit from this tool.

4:00 p.m. **Conference Adjourns**

