

JHI–Region of the Americas
Conference and Annual General Meeting
San Diego, June 13–16, 2007



Conference Programme

	Function	Details	Room
Wednesday June 13th			
9 am – 5 pm	Registration	Flow	Catwalk
9 am – 12 nn	RoA Executive	Committee Meeting	Industry 2
12 nn – 1:30 pm	RoA Executive	Committee Luncheon	Industry 2
2 pm – 5 pm	Plenary Session	Richard Worzel, Financial Futurist & Strategic Analyst: <i>Great Scott, Marty! What to Bring Back from the Future</i>	Great Room
2 pm – 5 pm	Spousal Programme	Spouses' Shopping in La Jolla	
7 pm – 9 pm	Group Social Programme	Welcome Reception	Full Beach
Thursday June 14th			
9 am – 12 nn	Registration		Catwalk
8 am – 10 am	Group Social Programme	Breakfast	Full Beach
9 am – 10 am	Plenary Session	Jeffnet Training Session – Dan Harris, en-terpret.co	Great Room
10 am – 10:15 am	Coffee Break		Great Room Foyer
10:15 am – 11:30 am	Sub-regional Meetings	USA: Ken Kirkland, KAF Financial Group <i>Level One Training for Staff; membership development; SIGs; and international engagements through JHI members</i>	Industry 1 & 2
		Canada: Jack Christiansen, Morgan & Company: <i>GST & income tax issues/working paper trends</i>	Studio 1
		Latin America: Juan José Moratorio, Moratorio Rodriguez Teodoro Borrás & Asoc: <i>The political landscape in Latin America; treaties with the US and their influence on local practices; generating more membership in the sub-region; and the possibility of hosting a small Spanish-language conference</i>	Studio 2
11:30 am – 1:30 pm	Lunch – Group Social Programme	Talk from Eileen & Jon Gallo, co-authors of <i>Silver Spoon Kids: How Successful Parents Raise Responsible Children</i>	Great Room
1:30 pm – 5 pm	Spousal Programme	Balboa Park for spouses – visit to two of the 17 facilities	
1:30 pm – 3:15 pm	Special Interest Group Sessions	IT – Dan Harris, en-terpret.co and Barry MacQuarrie, KAF Financial Group: <i>What your IT person might not be telling you & why it is costing you money</i>	Studio 1
		Accounting & Auditing – Tom Schulte, RBZ, LLP: <i>Topic TBA</i>	Studio 2
		Practice Management – Robert Pritchard, Pritchard Bieler Gruver & Willison, PC: <i>Staff Recruiting and Retention: If Only It Was As Easy As It Used To Be!</i>	Industry 1
		Forensics & Litigation Support - Steve Henning, Marks Paneth & Shron, LLP <i>Electronic discovery and emerging technology: How can my litigation services and forensic accounting practices benefit?</i>	Industry 2
3 pm – 3:30 pm	Coffee Break		Great Room Foyer
3:15 pm – 5 pm	SIG Sessions (continued)	Four concurrent sessions (repeated)	Same
Evening	Dinner on own	Sign-up sheets to be available at registration desk for four restaurants offering a range of prices & cuisine	Dine-around

	Function	Details	Room
Friday June 15th			
8 am – 10 am	Group Social Programme	Breakfast	Beach
9:45 am – 12 nn	Plenary Session	Non-Profit Clients – Mike McDowell, McCrory & McDowell, LLC & Andy Silverstein, Dorfman, Abrams, Music, LLC: <i>Tools for Effective Organizational and Financial Assessment Engagements for Non-Profits</i>	Great Room
12 nn – 2 pm	Delegates' Lunch	International Auditing Standards - Steve Henning, Marks Paneth & Shron, LLP, <i>International Auditing Standards: Recent developments and impending changes</i>	Industry 1&2
2 pm – 5 pm	Group Social Programme	City Tour – Gaslamp Quarter, Old Town, 1 hour harbour cruise for all	
5 pm – 9 pm	Group Social Programme	Visit to and Dinner at the San Diego Zoo for all	
Saturday June 16th			
8 am – 9:30 am	Group Social Programme	Breakfast	Full Beach
9:30 am – 12 nn	Group Social Programme	Tour of the USS Midway	
12 nn – 1:30 pm	Delegates' Lunch	Mark Dauberman, Mark Dauberman Seminars: <i>Culling Bad Clients</i>	Industry 1&2
1:30 pm – 3:15 pm	Plenary Session	John Dodsworth, CAMICO, <i>Current Developments in Risk Management</i>	Great Room
3:15 pm – 5 pm	Annual General Meeting	Elections for the 2007-2008 RoA Executive	Great Room
12 nn – 5 pm	Free time for spouses		
7 pm – 8 pm	Group Social Programme	Reception	Beach East
8 pm – 12 Mid	Group Social Programme	Gala Dinner/dance	Great Room/S 1&2
Sunday June 17th			
9 am – 4 pm	IEC Meeting		Industry 2
Monday June 18th			
9 am – 1 pm	IEC Meeting		Industry 2
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Name of Session	Session Level	Recommended CPE Credits	Delivery Method	Field of Study	Prerequisite
<i>Great Scott Marty: What to Bring Back From the Future</i>	Basic	3	Live	Personal Development	None
<i>Jeffnet Training Session</i>	Basic	1	Live	Computer Systems	None
<i>Level One Training for Staff</i>	Basic	1 1/2*	Live	Marketing Prof. Services	None
<i>GST and Income Tax Issues</i>	Basic	1 1/2*	Live	Taxation	None
<i>Political landscape of Latin America</i>	Basic	1 1/2*	Live	Economics	None
<i>Silver Spoon Kids</i>	Basic	2	Live	Communication Group Dynamics	None
<i>IT–Why It Is Costing You Money</i>	Basic	2	Live	Computer Science	None
<i>Accounting and Auditing</i>	Basic	Accounting – 1 Auditing – 1	Live	Accounting and Auditing	None
<i>Practice Management</i>	Basic	2	Live	Personnel HR	None
<i>Forensic and Litigation Support</i>	Basic	2	Live	Specialized Knowledge Forensic Accounting and Auditing	None
<i>Non Profit Clients</i>	Basic	2 1/2*	Live	Auditing	None
<i>International Auditing Standards</i>	Basic	2	Live	Auditing	None
<i>Cutting Bad Clients</i>	Basic	1 1/2*	Live	Business Management and Organization	None
<i>Current Developments in Risk Management</i>	Basic	2	Live	Management Advisory Services	None

* CERTAIN JURISDICTIONS DO NOT ACCEPT HALF CREDITS FOR CPE. PLEASE CONSULT THE RULES OF YOUR STATE AS TO THE ACCEPTANCE OF HALF CREDITS.