



## International

250 Consumers Road, Suite 301  
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Tel: 416.494.1440 Fax: 416.495.8721  
[www.jhi.com](http://www.jhi.com)

## JHI International Chairman's Message

### December 2007

Dear Members:

At the time of writing many of you will be preparing for the Holiday Season – on behalf of the International Executive Committee (IEC) I extend best wishes for the upcoming holidays, and wish you all a happy and healthy 2008.

The Annual General Meeting and international conference in Rome last month saw a record attendance from members around the world and provided an excellent opportunity to meet colleagues and friends, exchange updates and industry news and of course to discuss exchange of business and referrals.

The IEC also held meetings in conjunction with the conference as usual, meeting both one day before and one day after the conference to review and conduct business on behalf of you, the JHI members. I am always amazed at the number of hours and input given by this group of dedicated volunteer leaders from among our member firms. It has been a tremendous privilege to serve as chair of the IEC and to work closely with the executive members - I am excited to enter into this, the second year of my term at this juncture.

One of the decisions taken by the IEC, in line with similar recent decisions by both the Region of Americas and the Asia Pacific Region, was to recommend an increase in membership fees to members. This followed three years of holding our membership fees at the same level (in fact representing a major reduction for many former ACPA members) while concurrently we escalated the range of products and services available to the members. At the Annual General Meeting we reviewed the steady growth in activity (as reported in the following pages) and also the fact that JHI is playing a stronger role in the accounting profession worldwide with organizations such as IFAC and the Forum of Firms.

Members at the AGM voted unanimously in favour of such an increase, encouraging the IEC to continue down the road of building greater value for JHI members. The new fees including conference fees will be incorporated into the invoices for the 2008 year.



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I encourage you to read this update carefully and to provide me with your suggestions and feedback. We have enthusiastic and energetic committees and Special Interest Groups working on behalf of the entire membership worldwide – they deserve your support and congratulations for elevating the benefits of JHI to members from year to year. And, at the end of the day, this is good for business for all of us!

With best personal regards,

*Stuart Meyers*  
**International Chairman**

### **FORUM OF FIRMS**

The Forum of Firms is an association of networks of international accounting firms that perform transnational audits, formally constituted in 2002. The objective of the Forum is to promote consistent and high quality standards of financial reporting and auditing practices world-wide.

JHI is a founding member association of the Forum of Firms. Along with similar professional associations worldwide, JHI is participating in discussions and reviews that it is hoped will eventually lead to standardization world-wide. As such, and as the Forum of Firms moves further along the path to decisions that will impact members through the global accounting profession, the IEC has felt it is essential to remain a member and to have a seat at the table.

JHI has created a sub-committee to address IFAC and Forum of Firm issues, and to attend meetings in New York and London on behalf of JHI. This sub-committee consists of Mark Tenzer (Chair of the committee and also IEC liaison) at Jeffrey Henry in London who will attend all London-based meetings, Bill Stocker at Marks Paneth & Shron LLP in New York is the New York based member and Anthony Harris of Critchleys in Oxford, UK is the third member. Membership fees in the Forum of Firms are substantial – now at almost US\$40,000.00 annually.



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### CONFERENCES AND SPECIAL INTEREST GROUPS

Once again we have had a busy year conference-wise, with the international conference in Rome as the final event of the year. The IEC has formed a Program Committee, headed by Jacob Leon of Mir Fox & Rodriguez in Houston, to review content and programs for the international conference events. Jacob will call on global committee members to develop programming that responds to the mandate to provide interesting general business-oriented keynote speakers, balanced with opportunities for interactive working sessions so that members can have a chance to discuss business scenarios and get to know each other in a working environment.

The 2008 international conference will be at the **Ritz Carlton Hotel in Miami, Florida from October 29 – November 1, 2008** – watch Jeffnet for more details.

Regional conferences have focused far more closely on detailed educational programs – at the Asia Pacific conference in Shanghai in July 2007 the entire conference content was built around Strategic Planning, with JHI Asia Pacific used as the case study. The three-fold results were to provide a strong tool for member firms to use in their own environment, or for clients, while a clear direction was defined for the Asia Pacific Region moving forward!

In 2008 look out for regional conferences as follows:

<b>May 1-3, 2008</b>	European Regional Conference, Lisbon, Portugal
<b>June 11-14, 2008</b>	Region of Americas Conference, Quebec City, Canada
<b>July 16-19, 2008</b>	Asia Pacific Regional Conference, Surfer's Paradise, Australia

In addition, 2007 saw the launch of a most successful Spanish Language **Latin American Conference** in Sao Paolo, Brazil. Yes we know the Brazilians speak Portuguese! But Martinelli Advocacia Empresarial colleagues (all of whom are expert in Spanish too) hosted an impeccable event, chaired by Juan Jose Moratorio of Uruguay. Seventeen attendees came from around the region to discuss common issues and challenges. In 2008 this meeting will immediately precede the international conference in **Miami on October 28 & 29, 2008**. Once again the proceedings will take place in Spanish, with invitations extended to members worldwide.



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Special Interest Groups continue to thrive, with numbers of attendees building again this past year. For 2008 please note the following scheduled meetings. Please note that these focused topics provide excellent learning opportunities for diverse partners and managers within your firms – leverage your JHI membership by sharing these advantages with your own colleagues:

### **Audit & Tax Special Interest Groups Conference – [Date to be announced.]**

Increasingly issues at hand affect accounting practices worldwide. Although the majority of the 65 -70 attendees are still European based, members also attended from Chile and the United States to learn about upcoming challenges and best practices.

### **IT Special Interest Group Conference – [September 20 – 22, 2008]**

Year after year attendees at this event report that information learned is priceless in helping them and their firms retain and develop a leading edge in their field. Not only are members able to translate information learned into an advantage in their own workplace, but they are able to provide valuable consultancy to clients.

### **Litigation and Forensic Accounting Training – [January 26 – 27, 2008]**

A number of member firms provide specialty expertise in the area of litigation support and forensic accounting. Leading among them is Hemming Morse of San Francisco, USA, which offers senior training programs internally to their own staff. The upcoming seminar to be held in San Francisco at the end of January is being crafted with expertise from Marks Paneth & Shron of New York. Dan Ray has kindly extended the opportunity for training and development to all members of JHI at an upcoming training session to be held in and will be sharing information and details in upcoming Jeffnet alerts! This program will be offered under the auspices of JHI University – see below for more on this initiative.

### **Managing Partners Conference [September 2008]**

The second Managing Partners Conference took place in Atlanta, Georgia, USA in September 2007, with over 35 Managing or Senior Partners attending from member firms literally around the World. Leadership and strategic management topics were discussed in depth through a combination of Keynote Speaker sessions and workshop sessions. Members appreciated the opportunity to review such issues in depth with fellow members sharing similar concerns with regard to the leadership of a practice and business development. The third annual event is scheduled again for Atlanta this September.



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### **Not-for-Profit Special Interest Group**

A working committee was struck during the year to review an evaluation software for not-for-profit groups and to review ways that JHI members can benefit from this diagnostic tool. Mike McDowell of McCrory & McDowell LLC of Pittsburgh and Andy Silverstein of Dorfman, Abrams, Music LLC of New Jersey, will continue to lead the development of this committee over the coming year.

### **JHI UNIVERSITY**

This exciting new launch deserves a listing on its own, as it is a tremendous leap forward in providing value to members in the educational arena for younger staff entering the profession. Currently member firms source educational courses individually for staff to complete CPA training. Now, through JHI University, member firms can offer their staff the chance to attend these same courses, with the added benefit of a JHI environment and the opportunity to network with members of other JHI firms. This pilot program was launched in the Region of the Americas in October 2007 to great effect – 22 attendees signed up for Level One Accounting Training (CPA Training) in Houston, Texas.

In the coming year courses will be offered as follows:

**New York City - May 5-7, 2008 – CPA Level 3. May 8 & 9, 2008 CPA Level 5.  
Minneapolis – Oct. 19-23, 2008 CPA Level 1. Oct. 19-22, 2008 CPA Levels 2 & 4.**

### **MARKETING**

#### ***CORPORATE UK***

Close to 40 members around the World participated in the opportunity offered to us by the publication “Corporate UK” in September 2007. This special issue appeared as an insert to the magazine and focused uniquely on JHI. The 40 members featured in extended editorial and were also profiled with their logo and other specific corporate branding. All members appeared on the complete listing of firms worldwide and were shown on the accompanying global map. Over-runs of the issue were received by JHI and the participating 40 members for use in their own company marketing and branding. A few additional copies do remain – do not hesitate to contact us at [communications@jhi.com](mailto:communications@jhi.com) for additional details.



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Naturally we will continue to seek out such opportunities during the year, as well as maintaining our flow of media releases announcing new developments for JHI as well as interesting items of information about member firms. This is your organization – please keep sending us news-breaking items about your company!

### ***JHINEWS***

The JHI international newsletter is published twice a year electronically and in limited print format. Take a look on Jeffnet or on the JHI website for the latest version, and feel free to print copies for your own internal or promotional use – again contact [communications@jhi.com](mailto:communications@jhi.com) if you prefer to receive this in PDF format.

Note that both the European Region and the Region of the Americas publish superb electronic newsletters during the year to provide updates on activities within the region and beyond – again take a look at Jeffnet and the website.

### ***BLUE BOOK & Z-CARD***

And in our increasingly electronic world we know that members still enjoy receiving the Blue Book Member Directory and Z-Card in a print format for use internally in their offices and with clients. The 2008 versions are currently in preparation by Fiona Goh, Marketing Consultant based in the UK. Every year Fiona does a masterful job on this project as with various other marketing activities for the European Region. We anticipate production and circulation in the early part of 2008.

### ***THE NEW WEBSITE..... [www.jhi.com](http://www.jhi.com)***

Phase 1 of the website re-launch was completed in time for the International Conference and AGM in Rome in November. We are eager to hear your feedback and comments (thanks to many of you who have helped us with their comments already)! We are very proud of the new look, the ease with which one can navigate the site and the new functions that have been added.

Phase 2 in early 2008 will incorporate amendments and changes based upon your commentary and ideas, as well as items such as completion of the regional pages. Phase 3 slated to come later in 2008 will include searchable tools to seek out member firms by services as well as by name and geography. Our thanks to the “development team” headed by Shannon Bott, Director and Conference Manager and RoseMary MacVicar-Elliott, Communications Director in the JHI International Office, together with Marcello Grossutti, Designer and Tony Koch, Webmaster.



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### **MEMBER BENEFITS**

The list of benefits and member discounts continues to grow each year as we add publishing houses and software program developers to the list. For the latest list of suppliers providing discounts to JHI members please look on the Jeffnet or the website or contact [communications@jhi.com](mailto:communications@jhi.com). Also do not forget to let us know of any group or organization you wish to see added to the list.

### **INSURANCE**

On behalf of the members, JHI is looking into a variety of products over the next few months, to evaluate whether there is any program that might be of interest. We will update this area as information is received.

### **SPONSORSHIP & ADVERTISING**

As you will have noticed from the appearance of logos and other recognition along the way, JHI is building its circle of sponsors and advertisers from among those groups and organizations with whom we do valuable business. Please take a look at these supporters of JHI and where possible let them know how much we appreciate their products and their presence at our events. Also, once again please let us know if you have any suggestions for future partners.

### **CONCLUSION**

As you can see, this has been a busy and productive year – we are happy with the list of accomplishments and yet eager to begin the new year to bring you more! We encourage you, our members, to take full advantage of all that JHI offers, to attend as many activities as you can to leverage the body of knowledge and the networking circles.

Thanking you again for your support and best wishes for a good year to come in 2008.

*Stuart Meyers*  
**International Chairman JHI**