



## Region of the Americas

250 Consumers Road, Suite 301  
Toronto, Ontario, Canada M2J 4V6  
Tel: 416.494.1440 Fax: 416.495.8723  
[www.jhi.com](http://www.jhi.com)

### JHI REGION OF THE AMERICAS CHAIRMAN'S REPORT

PRESENTED TO  
THE JHI 27<sup>TH</sup>  
ANNUAL GENERAL MEETING  
ON NOVEMBER 4, 2006  
IN AUCKLAND, NEW ZEALAND

As usual, this has been a busy and productive year for members in the Region of the Americas. We have solicited new members, held a successful regional conference in Boston, MA, our Special Interest Groups have focused on generating new activity and held separate seminars, we have maintained our ability to give continuing education credits through NASBA, and we have continued to build firm-to-firm business liaisons with our members in the Region and around the world.

The 2006/2007 Regional Executive Committee is comprised of an active and dedicated group. I extend my thanks to the following for their contributions, their energy and their vision in making JHI a valuable tool for all of our members:

**Steve Altbaum**, Lipton Wiseman Altbaum & Partners  
**Joe Berkovits**, Berkovits Lago & Co LLP  
**Jim Daniels**, Davidson Fox & Company LLP  
**Ken Kirkland**, KAF Financial Group  
**Scott Mason**, Baune Dosen & Co LLP  
**Robert Pritchard**, Pritchard Bieler Gruver & Willison, PC  
**Dan Ray**, Hemming Morse Inc.  
**Barry Seidel**, Marks Paneth & Shron LLP

I would also like to take this opportunity to thank the JHI Region of the Americas team at Base Consulting and Management Inc., comprised of **Marie Bordeleau** (our Executive Director), **Joan Grant** and **Aileen Silang**.



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#### **MEMBERSHIP**

At our regional conference in Boston in June of this year, we were delighted to welcome Donner Weiser & Associates, PC of Atlanta, GA as a new member.

There continue to be a number of solicitations arising from the JHI website, as well as through enquiries passed along by members, all of which are followed up immediately by our Regional office. There are currently two firms from Chile who are interested in joining JHI and we are actively seeking members in the cities and countries where we do not have representation.

The Region's Executive has terminated the membership of four firms that were chronically late in their membership fees payments as well as inactive at the regional and international levels, and is working very hard to recruit firms that will make a real contribution to JHI in those cities.



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#### ROA ANNUAL CONFERENCE

The Boston conference, co-hosted by **Ken Kirkland** of KAF Financial group and **Bill Philbrick** of Greenberg, Rosenblatt, Kull & Bitsoli, P.C., was the first time we ever approached sponsors and our event attracted four sponsors for a total revenue of \$8350. There were 75 delegates from 39 firms in attendance and programming, while addressing a wide range of topics, focused particularly on practice management and succession planning. In all 135 people participated in the technical sessions and social events that included a fascinating visit to the JFK Museum followed by a wonderful clambake at a Boston landmark on Pier Four as well as a lovely dinner/dance on Saturday night.

The 2007 conference will take place June 13<sup>th</sup> to the 16<sup>th</sup> at the W San Diego in California, and we are very excited to be planning another solid programme. This time we plan to focus on practice efficiency by approaching the topic of technology with a view to work smarter rather than harder. Our keynote speaker will be **Leonard Kleinrock**, also known as the father of the internet, and we are in the process of booking top-notch, senior speakers to address all kinds of related issues with our delegates. Social events will include a tour of the San Diego Zoo and a dinner in the treetops.

Plans are also proceeding to organize the 2008 Region of the Americas in Québec City so that we may enjoy the events related to its 400<sup>th</sup> anniversary that year. We will stay in the Old City at the Auberge Saint-Antoine, rated the third top hotel in all of Canada by Condé Nast Traveler Magazine. Located near in Old Port, the hotel is inside North America's last fortified city. Further details will be available at the end of our conference in San Diego next June.



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#### SPECIAL INTEREST GROUPS

The Inaugural Managing Partners' Summit was held in Denver, CO, in conjunction with the annual IT Conference. The alliantgroup returned as a sponsor for this event. Led by **Mike McDowell** and moderated by **Art Bowman**, this first meeting of Managing Partners from around the world allowed our members to compare effective management techniques and styles, discuss the facts and realities of mergers and acquisitions in the accounting industry and other methods of business development. Of the 36 delegates who attended, 7 were from Canada and 10 were from overseas. I will leave it to Mike McDowell to give this group an overview of the discussions and resulting outcomes, and will simply note that the Region of the Americas is planning to host the second edition of the MP Summit from September 30<sup>th</sup> to October 2<sup>nd</sup>, 2007 in Atlanta, GA.

The IT Conference, co-chaired by **Dan Harris** and **Barry MacQuarrie**, was also very successful and a joint session with the Managing Partners at the beginning of both seminars allowed for an interesting dialogue between two very important areas of accounting practices. Discussions are on-going to determine whether their event should be concurrent to the MP Summit again, or simply have an overlapping day.