

Tax Professional Training Day

AT PORTOFINO

8:00 A.M. – 4:30 P.M., THURSDAY, NOVEMBER 5, 2015

Portofino: 249 E. Main Street, Lexington, Kentucky 40507

Engaging

SPEAKERS

Exquisite Art

FROM AROUND THE REGION

Stand-up Comedian

ENTERTAINMENT

This informative workshop offers CPAs, RPs, ERAs, and ERPAs a thorough examination of the following topics:

- Accounting Fraud Study
- Current ACA Healthcare Update
- Expand Your Practice through Tax Planning
- Effective Communication with Clients and Staff
- The Role of Accountants in Bankruptcy

Email Team@FamilyFinancialPartners.com or call 859.219.1006 to register. In lieu of a registration fee, we request you make a \$50 donation to the Family Financial Foundation, a nonprofit that helps Kentucky families. This event is limited to the first 50 registrants. Your registration will be confirmed by email.

Registration ends **Thursday, October 22**



FamilyFinancialPartners.com

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Investment Advisory Services offered through O.N. Investment Management Company. Securities offered by David E. Smyth, Alexander M. Roig, Scott Downing and Brandon Schleiter, Registered Representatives, through: The O.N. Equity Sales Company, Member FINRA/SIPC, One Financial Way, Cincinnati, OH 45242 513.794.6794

Schedule

- 8:00 Registration and Continental Breakfast
- 8:25 Welcome
- 8:30 ACA Update
John Humkey, CLU
Employee Benefit Associates
- 9:20 The Role of Accountants in Bankruptcy and Workout Proceedings
Jamie Harris, Esq.
DeCotto Law Group, PLLC
- 10:10 Break
- 10:20 Opportunities to Grow Your Practice through Tax Planning
Jim Ryan, CPA
ATEL Securities Corporation
- 11:10 Financial Planning for Future Generations: FeeForPlan.com and Planning Checklist
Alex Roig
- 11:30 Lunch and Entertainment
- 12:50 Client Case Study: Taking Care of Your Toughest Client
David Smyth
- 1:05 Ethics: Dynegy Corporation: Inflating Operating Cash Flow
Dr. Fred Sellers, Ph.D., CPA
Associate Professor Emeritus, Accounting
Southwestern University, Georgetown, Texas
- 1:55 Dessert Break
- 2:15 Executive Professionalism: How to be a More Effective and Credible Leader
Kelly Watkins, MBA
Expressive Concepts
- 4:00 Conclusions and Closing Comments



This CE workshop has been approved for 6 hours of CPE/CE credits for CPAs, RPs, ERAs, and ERPAs of Kentucky. IRS Qualified Sponsor #684 Provider Number UN108