27TH ANNUAL

SPRING ACCOUNTING EXPO

A Two-day Conference Designed for The Profession
Planned by the Business and Industry Committee

Monday & Tuesday
May 16 & 17, 2016

One NRG Park

Patrick Jankowski,
Sr. Vice President of Research
Greater Houston Partnership
Luncheon Speaker
May 16, 2016

Reid Ryan, President of Business Operations
Houston Astros
Luncheon Speaker
May 17, 2016
### SCHEDULE - MONDAY, MAY 16, 2016

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<tr>
<td>7:15 AM</td>
<td><strong>REGISTRATION</strong></td>
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<tr>
<td>8:00 AM</td>
<td>2016 ANNUAL ACCOUNTING &amp; AUDITING UPDATE</td>
<td>PANEL: FRAUD IN THE CONTEMPORARY BUSINESS &amp; ACCOUNTING ENVIRONMENT</td>
<td>TECHNOLOGY UPDATE</td>
<td>THE STATE OF THE M&amp;A MARKET</td>
<td>INDIVIDUAL TAX UPDATE</td>
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<td>A.E. Stephens &amp; Co.</td>
<td>Law Firm, David G. Acovitz, CPA,</td>
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<td>Steven J. Tillinger, CPA</td>
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<td>Acosta Cooper Forensic Accounting Group PLLC, Danielle Supkis Cheek, CPA, D Supkis Cheek, PLLC, J. Richard Claywell, CPA, J. Richard Claywell, CPA, Gregory R. Schuelke, CPA, RSM LLP</td>
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<td>Steven J. Tillinger, CPA</td>
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<td>10:00 AM</td>
<td>MAKING SENSE OF TODAY’S ECONOMY AND INVESTING</td>
<td>PANEL: MANAGING YOUR BANKING RELATIONSHIP</td>
<td>HOW TECHNOLOGY IS REDEFINING THE CONSTRUCTION INDUSTRY</td>
<td>BUSINESS VALUATIONS FOR BEGINNERS:</td>
<td>SMALL BUSINESS TAX UPDATE</td>
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<td>Kate Warren, PhD, CFA</td>
<td>James R. Wilkinson, CPA, The Strategic CFO, LLC, William R. Bobbora, Cadence Bank, Bethany A. Borcherding, Amyx Bass, Terrence E. Hill, JF Morgan Chaise Bank, N.A.</td>
<td>Todd L. Wyne, Rogers – O'Brien Construction</td>
<td>UNDERSTANDING ASCVS 100</td>
<td>Steven J. Tillinger, CPA</td>
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<td>Edward Jones</td>
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<td>J. Richard Claywell, CPA</td>
<td>Steven J. Tillinger, CPA</td>
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<td>11:40 AM</td>
<td>SEATED LUNCHEON – PATRICK N. JANKOWSKI, CCR, GREATER HOUSTON PARTNERSHIP</td>
<td>BOOM OR BUST, IT’S STILL ABOUT THE PEOPLE</td>
<td>PCPS CPA TOP FIRM ISSUES</td>
<td>INTERNATIONAL TAX UPDATE</td>
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<td>D. Supkis Cheek, PLLC</td>
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<td>1:20 PM</td>
<td>HELP! I’M IN CHARGE OF MY FIRM’S BENEFITS!</td>
<td>THE SMART BACK OFFICE: UNLEASHING THE POWER OF QUICKBOOKS TO AUTOMATE YOUR BACK OFFICE</td>
<td>FRAUD IN THE WORKPLACE</td>
<td>BEST PRACTICES: INTERNAL CONTROLS</td>
<td>TIPS &amp; TRICKS: WORD AND POWERPOINT</td>
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<td>Richard W. Nevin, CPA</td>
<td>Stephen King, CPA</td>
<td>Gregory R. Schuelke, CPA, RSM, LLP</td>
<td>John C. Blackshire, Jr. Corporate Compliance</td>
<td>Bobby J. Doss</td>
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<td>3:20 PM</td>
<td>NEGOTIATING TO GET WHAT YOU WANT AND STOP SETTLING FOR JUST WHAT YOU NEED</td>
<td>THE SMART BACK OFFICE: UNLEASHING THE POWER OF QUICKBOOKS TO AUTOMATE YOUR BACK OFFICE</td>
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<td>TIPS &amp; TRICKS: EXCEL AND OUTLOOK</td>
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<td>Tim Phillips</td>
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### SCHEDULE - TUESDAY, MAY 17, 2016

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<td>INVESTOR PSYCHOLOGY</td>
<td>INTERVIEWING, ONBOARDING, AND DEVELOPING TOP TALENT &amp; HOUSTON MARKET UPDATE</td>
<td>THE PATH LESS TRAVELED: A CPA’S GUIDE TO MIXING NEW LEGISLATION WITH LONG-STANDING CLIENTS</td>
<td>CURRENT ENVIRONMENT ENERGY</td>
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<td>Steven R. Goodman, CPA, Goodman Financial Corporation</td>
<td>Rick S. Figueroas, CPA, UBS Financial Services, Charles Anderson, Oppenhimer, Funds/SteelPath</td>
<td>Candace Meade, Lucas Group</td>
<td>Dean Zerbe, JD and Michael L. Siegel, CPA, alliantgroup</td>
<td>Curt D. Karges and Douglas R. Moyer, CPA, PricewaterhouseCoopers Corporate Finance LLC</td>
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<td>10:00 AM</td>
<td>CONFLICT RESOLUTION</td>
<td>STRENGTH FINDING: EMPOWER YOUR TEAM TO DRIVE BETTER BUSINESS RESULTS</td>
<td>YOU STILL CAN’T MAKE THIS STUFF UP! A 2016 EMPLOYMENT LAW UPDATE</td>
<td>CLOUD COMPUTING</td>
<td>ETHICS FOR CPAS: IT’S A MATTER OF CHOICE</td>
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<td>Charles C. Cummings Jr., CPA, Cummings &amp; Houston, LLP</td>
<td>Pauline N. Le, CPA, Birkenman International, Byron M. Hebert, CPA, PKF Texas, P.C.</td>
<td>W. Jackson Wisdom, JD, Martin, Disiere, Jefferson &amp; Wisdom, LLP</td>
<td>Bryan L. Wilson, CPA, InterDyn BMI</td>
<td>Deanna Sullivan, CPA, SullivanSolutions</td>
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<td>HOW RECENT LAW CHANGES WILL AFFECT THE SOCIAL SECURITY CLAIMING DECISIONS</td>
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<td>FROM INSIGHT TO IMPACT: UNLOCKING OPPORTUNITIES IN BIG DATA AND DATA ANALYTICS</td>
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MONDAY, MAY 16, 2016

8:00 AM
Track 1 2016 Annual Accounting & Auditing Update – Attendance at an “A&A” update is an annual tradition with most professional accountants. Gary Hotchkiss focuses on recently issued Accounting Standards Updates (ASUs) from the Financial Accounting Standards Board, as well as Auditing and Attestation standards issued by the American Institute of Certified Public Accountants. You will leave this executive-overview session update with a practical, working knowledge of when and how to actually apply new pronouncements in their particular professional circumstances.

Track 2 Panel: Fraud in the Contemporary Business & Accounting Environment – Please bring your questions to this interactive panel discussion, where moderator Bill Nantz and panelists David Acosta, Richard Claywell, Greg Schueuleke, and Danielle Supkis Cheek highlight red flags and predication of fraud found in the workplace, fraud in the general practice of public accountancy, and fraud involving your clients.

Track 3 Technology Update – Bryan Wilson presents a high-level, fast-paced review of current and emerging technology available in today’s market.

Track 4 State of the M&A Market – Mike Parrott examines the current trends in M&A, including a look at capital markets, valuation, industry analysis, and emerging trends. Intermediate

Track 5 Individual Tax Update – Steve Tillinger focuses on developments in individual federal income taxation including recent federal income tax legislation, important court cases, Treasury income tax regulations and IRS revenue rulings and procedures.

10:00 AM
Track 1 Making Sense of Today’s Economy and Investing - What's the outlook for stocks and bonds? How important are concerns about inflation, interest rates and the global economy? What are the strategies to use in today's markets? Kate Warne addresses these questions, talks building investment portfolios, and provides some recommendations.

Track 2 Panel: Managing Your Banking Relationship – Jim Wilkinson moderates this interactive panel discussion which features banker-panelists Bill Bobbora, Bethany Borcherding, and Terrence Hill discussing how to get the most out of your banking relationship.

Track 3 How Technology is Redefining the Construction Industry – Toddy Wynne showcases technology integration to aid in operations management for construction. He also discusses and demonstrates a variety of apps, hardware, and processes.

Track 4 Business Valuations for Beginners: Understanding ASCVS 100 – Richard Claywell discusses the AICPA Business Valuation Standards (ASC VS 100) and provides an overview of valuation procedures all CPAs are required to follow and what constitutes an opinion of value. He also discusses the various types of reports and what should be included in them.

Track 5 Small Business Tax Update – Steve Tillinger focuses on developments in small business federal income taxation including recent federal income tax legislation, important court cases, Treasury income tax regulations and IRS revenue rulings and procedures.

11:40 AM – 1:00 PM – LUNCH

Houston’s Economic Outlook – For the fifth time in the past 35 years, Houston struggles with another drop in oil prices. How bad will it get? When will Houston Recover, and what will Houston look like when it does? Patrick Jankowski, Senior Vice President of Research at the Greater Houston Partnership, offers his insights about what Houston can expect going forward.

1:20 PM
Track 1 Help! I’m In Charge of my Firm’s Benefits! – Richard Nevins discusses everything from the impact of the ACA to work-site products. Should you move to a Health Savings Account or is it better to become self-funded? What is the government doing and how should your broker help you? This is your opportunity to learn what you need to understand to handle your benefits.

Track 2 Boom or Bust, It’s Still About the People – Good times or bad, it’s the people who make or break your company. Moritza Day, a veteran search consultant, and Jay Steinfeld, a CEO who used innovative hiring and retention practices to build a $100 million e-business and then sell that business to Home Depot, pull aside the hiring curtain to disclose the essential elements of hiring and the crucial traits to look for in successful candidates. They also discuss how to take advantage of the current times to recruit and retain the talent you might not have been able to attract during the recent boom times.

Track 3 How Technology is Redefining the Construction Industry – Toddy Wynne showcases technology integration to aid in operations management for construction. He also discusses and demonstrates a variety of apps, hardware, and processes.

Track 4 International Tax Update – Walt White updates on international tax hot topic issues including prospects for international tax reform, the Base Erosion and Profits-Sharing Initiative, and anti-Inversion rules.

Track 5 Tips and Tricks: Word and PowerPoint – During this session you will see and learn about what is new in both MS Word and MS PowerPoint. Bobby Doss shares many tips and tricks, and is ready and willing to answer any and all of your questions live!

3:20 PM
Track 1 Negotiating to Get What You Want and Stop Settling for Just What You Need – Tim Phillips imparts practical and immediately-usable professional negotiation tools and techniques to empower you to get exactly what you want, instead of just settling for what you need. This is not just theory, but instead easy-to-use secrets, strategies, tactics, and the specific words and phrases to get what you want. Presented by one of the world’s greatest million-dollar negotiators with over 30 years of professional experience, this powerful session is a personal game-changing experience.

Track 2 The Smart Back Office: Unleashing the Power of QuickBooks to Automate Your Back Office – Stephen King shows you how QuickBooks Desktop and QuickBooks Online have changed from being just a general ledger to a fully-integrated suite of web-based solutions. In this high-energy session, you’ll learn how leveraging an automated back office can help CPAs be a trusted advisor while empowering CEOs to make better business decisions. Intermediate

Track 3 Fraud in the Workplace – Fraud is affecting businesses on a daily basis. New frauds are coming to light using both old and new schemes. Greg Schueuleke informs you about interesting frauds recently occurred or reported as well as new and emerging fraud scheme-types making their presence known in your clients’ industries today. Intermediate

Track 4 Best Practices: Internal Controls – Whatever their mission or size, all organizations should establish a framework of internal controls to manage the risks they face. The organization needs to have assurance that 1) the organization’s objectives are articulated, 2) boards and officers understand their fiduciary responsibilities, 3) assets are managed properly, and 4) the business purposes are carried out. John Blackshire discusses a simple set of internal control principles that need to be present and functioning.

Track 5 Tips and Tricks: Excel and Outlook – During this session you will see and learn about what is new in both MS Excel and MS Outlook. Bobby Doss shares many tips and tricks, and is ready and willing to answer any and all of your questions live!

A link to speakers’ course materials will be provided to offer you the opportunity for downloading those of interest prior to the Expo.

Course Objective: Give attendees the opportunity to receive updates/overviews on topics relevant to various industries.
Level of instruction: Basic/Overview/Update, unless otherwise noted.
Prerequisites: None
TUESDAY, MAY 17, 2016

8:00 AM
Track 1  Active vs. Passive Investing: Beyond the Biases – Steve Goodman presents a comparison of active and passive investment strategies. He evaluates their respective pros and cons along with how each can be useful for your portfolio. Considerations include costs, performance, tax efficiency, and investor behavior.

Track 2  Presentation 2.0: Understanding How Your Audience Thinks, Acts, and Decides – Doug Williams shares what presenters need to know about how audiences make a business decision. Topics include how to develop content, create a persuasive structure, craft a message, manage the Q&A, and deliver an effective performance.

Track 3  Riding the Waves of Change: How to Successfully Lead, Manage, Measure & Sustain Change for Smooth Project and Program Sailing – Project initiatives often encounter rough waters because the organization asks employees to do something different. Furthermore, initiatives muddy the waters when change-management processes and tools aren’t aligned and integrated into the overall project-management framework. Organizations can take steps to help employees take to change as a duck takes to water. Mark Hordes presents the critical success factors and “must-do” steps to enable your change-management interventions to succeed and sustain the test of time.

Track 4  Cyber Fraud in 2016 – Cyber fraud and cybersecurity are two of the hottest topics in business discussions today. Dan Ramey and Kevin Cooke discuss what is going on in the world of cyber fraud and how you can reduce the likelihood of becoming a victim. They discuss how cyber fraud happens, who is doing it, what steps are needed to protect your organization, and how to develop an incident-response plan. Are you prepared for an attack on your organization?

Track 5  Leases 101: An Overview and Perspectives on the New Leases Standard – John Vickers and Tim Kolber discuss the recent FASB accounting standards update on leases, which introduces ASC Topic 842 to U.S. GAAP. They focus on the key provisions of the new standard, their impact on both lessees and lessors, and the resulting presentation and disclosure requirements. Also highlighted will be certain key activities that will assist preparers as they embark on their journey towards implementing the new guidance. Certain expected pressure points that may exist when implementing the new standard in the oil & gas industry will be discussed along with observations and perspectives that have resulted in interactions with various stakeholders operating within the industry.

10:00 AM
Track 1  Conflict Resolution – Have you ever wondered what causes those stressful conflicts between people? Do they sometimes seem impossible to solve? In some cases a little knowledge goes a long way in enhancing your life and the lives of others around you. Chuck Cummings discusses the root causes and benefits of conflicts and practical ways to minimize or resolve your conflicts during this motivational and inspirational session.

Track 2  Investor Psychology – Rick Figueroa and Charles Anderson introduce behavioral finance (the study of understanding personality, emotion, tendencies, behaviors, and attitudes towards investing) and how to use it to identify your own investment habits and personality so you can construct a suitable portfolio to reduce or prevent mistakes, make stronger strategic decisions, and transform your financial future.

Track 3  Interviewing, Onboarding, and Developing Top Talent & Houston Market Update – Candace Meade answers the question: what makes an A+ candidate join one company instead of another? It starts with the first phone call they receive regarding the role. The company reputation (development and career opportunities) is extremely important, but the interview process is the first real-life glimpse into the culture of the company that a candidate gets. From extending an offer to working through the setup of paperwork, desk, technology, and background check, the onboarding process sets the stage for the employee getting started on the right foot, and with the best impression of having made the right choice.

Track 4  The PATH Less Traveled: A CPA's Guide to Mixing New Legislation with Long-Standing Clients – Dean Zerbe and Michael Siegel address the most pressing and ongoing affairs affecting your clients. They promise to deliver a premium learning opportunity that will balance policy and statute with financial opportunity and tax strategy for your clients.

Track 5  Current Environment Energy – Curt Karges and Doug Meier discuss trends, opportunities, and stress in the oil and gas sector.

11:40 AM – 1:00 PM - LUNCH
Baseball Success in the Dynamic Landscape of Professional Sports – Reid Ryan, President of Business Operations for the Houston Astros, shares how planning, analytics, and forecasting are how you win the game.

1:20 PM
Track 1  How Recent Law Changes Will Affect the Social Security Claiming Decisions – With the recent changes, the Social Security claiming decision is more complex and much more important than ever. David Zander discusses these changes and how they affect your clients.

Track 2  Strength Finding: Empower Your Team to Drive Better Business Results – Pauline Le and Byron Hebert help identify your team’s strengths and utilize existing tools to find the right fit beyond resume highlights and interview impressions. Discover the personality approach that helps department leaders develop new hires into successful team members, maximize existing employees’ potentials, and build stronger working relationships to improve communication with other departments to deliver better business results.

Track 3  You Still Can’t Make This Stuff Up! A 2016 Employment Law Update – The Department of Labor and the National Labor Relations Board continue to pursue transformational regulatory and enforcement agendas with confidence and vigor. The courts are working overtime to keep up with class-action lawsuits relating to unpaid overtime and a boom in discrimination claims. Employers are trying to stay in business, keep out of trouble, and maintain a sense of humor and perspective even though it feels a bit like the end of the world in these parts. Jack Wisdom examines the most significant developments in labor and employment law, and offers practical advice to employers seeking refuge from the tempest.

Track 4  Cloud Computing – Bryan Wilton defines & demystifies cloud computing, & discusses what it is, why it matters, & several commercial cloud software packages.

Track 5  Ethics for CPAs: It's a Matter of Choice – Join Deanna Sullivan for an interactive session where you have the opportunity to: become educated in the ethics of the profession; understand the TSBPA's Rules of Professional Conduct & the core values of our profession; practice applying ethical judgment in interpreting these rules & values; learn to utilize these ethical principals in making choices appropriate for the profession & the public; learn about the components & red flags of fraud; and take an ethics test to measure yourself against the fraudsters. *this course meets the Texas State Board of Public Accountancy's Ethics Course Requirements for Licensees for four hours of continuing education.

3:20 PM
Track 1  From Insight to Impact: Unlocking Opportunities in Big Data and Data Analytics – The volume and variety of data available for analysis is expanding exponentially. Inevitably, taking advantage of these opportunities with data will be challenging for companies, creating the need for new skills, tools and ways of thinking. So what does the data-driven era imply for business leaders, and finance professionals in particular? What benefits are being derived from new approaches to data analytics? And what role should management accountants seek to play in this area? Paul Parks addresses these questions and more.

Track 2  Non-Profit Accounting Basics – Tonja Rodriguez discusses the differences in accounting and reporting between non-profits and business enterprises including highlights of pending pronouncements relating to non-profit organizations.

Track 3  10 Soft Skills for Success – Having the technical skills and knowledge to successfully execute your job duties is only one part of being the best you can be in the workplace. In addition to these “hard” skills, we also need “soft” skills – those skills which allow us to effectively work with others. No matter your position, organization, or industry, “you work with people!” Taking the time to build effective soft skills can contribute to a more efficient, more harmonious, and more productive workplace, as well as to your own overall job happiness and satisfaction. Christine Spray discusses these essential soft skills you need.

Track 4  Retirement Readiness: The Bottom Line – Tom Foster discusses the economic benefit of maintaining a fully-functional retirement plan and the effect of regulatory and statutory changes on the employee benefit landscape. Intermediate

Track 5  Ethics for CPAs: It's a Matter of Choice (continued)
Registration Fees
Registration fees for this two-day Expo are $355 for Houston/other Chapter members and non-CPAs, and $455 for non-Chapter member CPAs. Fee includes admission, parking for each day, continental breakfast, coffee and refreshment breaks, seated luncheons and program materials. Registration will begin at 7:15 AM.

Cancellation and Substitution Policy
Registrants who cancel prior to May 9, 2016 are subject to a $50 cancellation charge. NO REFUNDS will be issued on cancellations received after May 9, 2016. A registration may be transferred to another individual if a registrant is unable to attend. An additional $100 registration fee will be charged to a nonmember CPA transferee. “No Shows” forfeit the entire registration fee.

CPE Credit
CPE credit for the conference is 18 hours (9 hours each day). Partial CPE credit will be given for partial attendance with one-half-hour CPE credit increments permitted after the first contact hour has been earned. TSBA registered sponsor ID #000094. CFP, EA, and MCLE continuing education credits for the conference are pending. Sessions eligible for those credits will be indicated on the digital sign outside each session room.

Other Information
Satisfactory meeting room temperatures are difficult to maintain. Registrants may wish to bring a sweater or jacket to ensure comfort. Please mute all electronic devices while in session rooms. Smoking is prohibited in the facility at all times.

Tax Information
The IRS will allow only 50% of all expenses for business meals/entertainment as deductible for tax purposes. The definition of meals includes continental breakfasts, refreshment breaks, lunches and receptions at professional seminars and conferences, including taxes and gratuities. Cost per day: $74.00

NRG Park – Houston, TX 77054
NRG Park is located within the Inner Loop of the southern portion of Interstate Loop 610 between Kirby Street and Fannin Street. Attendees will use the McNee entrance off Kirby (Entrance #10). Parking is included in your registration fee at NRG Park with no in-and-out privileges. Parking for the event will be in the North Fannin (orange) parking lot. You will be sent a link to print your parking pass (one for each day). You must turn in a pass to the parking attendant each day.

Alternative transportation: Metro bus from a Park & Ride lot to downtown or the South Fannin Park & Ride lot. From there, connect to light rail which has a station on Fannin at NRG Center.

Wi-Fi is available at no charge in the common/registration area. Wi-Fi access may be purchased on site for the session rooms at $12.95/day/device.

Hotel Information
Courtyard by Marriott Medical Center
7702 Main St., Houston 77030
Phone: 713.668.4500
Conference Rate: $159/King; $149/Queen
Room Rate Cut-off Date: May 1, 2016
2016 SPRING ACCOUNTING EXPO

Monday May 17 and Tuesday May 18, 2016

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A. Brian Alberts, Vice Chair
John E. Foster, Vice Chair
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Plan to attend the Social Hour
Monday, May 16, 5:00 to 6:00 PM
Drawing for 2017 Expo Registration
(Must be present to win)