



National Training Meeting

September 18 - 19, 2014 | Orlando, FL

Thursday, September 18

12:00pm – 2:00pm	Registration	Transportation Lobby (Lobby Level)
2:15pm – 5:00pm	Office Visit <i>Buses will board at 2:15pm and leave the hotel at 2:30pm.</i>	
	<ul style="list-style-type: none">• 3:15pm – 5:00pm Vince Howard Howard & Company 720 Rodel Cove Lake Mary, FL 32746 407-333-8110	
5:00pm – 6:00pm	Load Buses & Transport to Universal CityWalk	
6:00pm – 7:30pm	Dinner on Your Own at Universal CityWalk OR Transport to Rosen Shingle Creek	
8:00pm – 10:00pm	Blue Man Group Performance (Ticket Purchase Required)	
10:15pm – 10:30pm	Load Buses & Transport to Rosen Shingle Creek	



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Owners & New to PASBA

Friday, September 19

7:30am – 8:30pm	Registration Breakfast	Suwanee Registration (2 nd level meeting space) Suwanee 16
8:30am – 9:50am	New to PASBA Owners Meeting Owners Who Sell	Suwanee 20 Suwanee 19 Suwanee 21
9:50am – 10:10am	Session Break	Suwanee Foyer
10:10am – 11:30am	Meetings Continued	See Above
11:30am – 12:30pm	Lunch	Suwanee 16
12:30pm – 1:50pm	Meetings Continued	See Above
1:50pm – 2:05pm	Session Break	Suwanee Foyer
2:05pm – 3:25pm	Meetings Continued	See Above
3:25pm – 3:45pm	Break	Suwanee Foyer
3:45pm – 5:00pm	Meetings Continued	See Above



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Advanced Bookkeeper Agenda

7:30 – 8:30	Breakfast	Suwanee 16
8:30 – 9:50	Efficient Ways of Processing Monthly Accounts , <i>Vince Howard & Steve Macy</i>	Suwanee 15
	(Halfway through this session, attendees will split into user groups of Thomson Reuters and Dillner's Accounting Tools.)	TR – Suwanee 15, Dillner's – Suwanee 14
9:50 – 10:10	Morning Break	Suwanee Foyer
10:10 – 11:30		
	Client Reporting , <i>Kim Corneliuson</i>	Suwanee 17
	Client Communication , <i>Chuck Bauer</i>	Suwanee 15
11:30 – 12:30	Lunch	Suwanee 16
12:30 – 1:50		
	Making Late Reporters Into Timely Reporters & Non-Reporting Clients , <i>Van Ballantyne</i>	Suwanee 17
	Client Training Part 1 , <i>Joseph Hastreiter</i>	Suwanee 15
1:50 – 2:05	Afternoon Break	Suwanee Foyer
2:05 – 3:25		
	Accurate Stats & Managing Deadlines , <i>Brian McGinn, Shane Diamant</i>	Suwanee 17
	Client Training Part 2 , <i>Joseph Hastreiter</i>	Suwanee 15
3:25 – 3:45	Afternoon Break	
3:45 – 5:00	Advanced Bookkeeper Roundtable Discussion , <i>Diana Nieves</i>	Suwanee 11/12

Open session to ask questions and discuss topics presented. Bring your questions and ideas to share with your peers.



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Supervisor Agenda

7:30 – 8:30	Breakfast	Suwanee 16
8:30 – 9:50		
	Everyday Tax Planning Ideas & M2C2 , <i>Bob Chamberland & Rick Dopuch</i>	Suwanee 18
	What is My Job Description , <i>Tim Nolan</i>	Suwanee 17
9:50 – 10:10	Morning Break	Suwanee Foyer
10:10 – 11:30		
	Initial Strategy Session , <i>Brian Paulson & Brian McGinn</i>	Suwanee 17
	Client Communication , <i>Chuck Bauer</i>	Suwanee 15
11:30 – 12:30	Lunch	Suwanee 16
12:30 – 1:50		
	Getting Clients Up & Running in 30 Days , <i>Brent Motl</i>	Suwanee 17
	Client Training Part 1 , <i>Joseph Hastreiter</i>	Suwanee 15
1:50 – 2:05	Afternoon Break	Suwanee Foyer
2:05 – 3:25		
	New Capitalization & Depreciation , <i>Lynn Schmidt</i>	Suwanee 18
	Client Training Part 2 , <i>Joseph Hastreiter</i>	Suwanee 15
3:25 – 3:45	Afternoon Break	
3:45 – 5:00	Supervisor Roundtable Discussion , <i>Jon Petit & Burt Monroe</i>	Suwanee 16

Open session to ask questions and discuss topics presented. Bring your questions and ideas to share with your peers.