

# .....2014..... NATIONAL TRAINING MEETING

SEPTEMBER 18-19  
ORLANDO, FLORIDA



## REGISTRATION

### MEETING REGISTRATION FEE

\$125/person\* through Aug. 31

### LATE MEETING REGISTRATION FEE

\$150/person\* beginning Sept. 1

CPE CREDIT \$25/person

### CLICK HERE TO REGISTER ONLINE

- Log in to [members.pasba.org](http://members.pasba.org)
- Click on Conferences & Meetings
- Select 2014 National Training Meeting
- Click on Register and follow the prompts

*Cancellations after September 1 will not be refunded.*

#### PLEASE NOTE:

Blue Man Group tickets and transportation for office visit & show are not included in registration fee.

Please see registration form for additional costs.

The office visit is a key component to this meeting. Allowing your staff to see how other offices successfully operate creates opportunities for them to improve their daily work routines. This year, we are excited to have organized a visit to the office of PASBA member **Vincent Howard**.



This meeting is directed toward bookkeepers, supervisors and owners of PASBA member accounting firms who want to learn not only the basics of bookkeeping and supervisor training, but also best practices of successful offices. All participants are encouraged to openly share information about the daily management and marketing in their practices during all sessions.

### NEW TO PASBA

Participants are expected to have a working knowledge of bookkeeping procedures to participate in this PASBA basics session. This session includes tips on production, client reporting, and overall PASBA processes. There are no prerequisites for attendance.

### ADVANCED BOOKKEEPER

Sessions include: Efficient Ways of Processing Monthly Accounts, Client Reporting, Client Communication, Making Late Reporters into Timely Reporters & Non-Reporting Clients, Client Training, Accurate Stats & Managing Deadlines. In addition, all bookkeepers will attend an Open Roundtable Discussion.

### SUPERVISOR

Sessions include: What is My Job Description?, Everyday Tax Planning Ideas & M2C2, Initial Strategy Session, Client Communication, Getting Clients Up & Running in 30 Days, Client Training, New Capitalization & Depreciation. In addition, all supervisors will attend an Open Roundtable Discussion.

### OWNERS' MEETING

PASBA members are invited to participate in discussions about PASBA best practices, marketing, and current technologies with other owners of PASBA practices. This meeting is viewed as an Open Roundtable Discussion.

### YOUR SALES PRESENTATION – KICK IT UP A NOTCH

Open discussion for Owners Who Sell to identify your challenges in each area of the sales presentation. Expect to:

- » Learn to identify your challenges
- » Get ideas from others
- » Walk away with an improved sales presentation

### QUESTIONS?

Please contact Jordan Bennett in the PASBA Central Office with any questions.

E-MAIL [jbennett@dci-kansascity.com](mailto:jbennett@dci-kansascity.com) | PH 866.296.0001

## AGENDA

### THURSDAY, SEPTEMBER 18

12:00 pm – 2:00 pm *Registration*  
2:30 pm – 5:00 pm *Office Visit*  
6:30 pm – 7:30 pm  
*Dinner on your own at Universal CityWalk*  
8:00 pm – 10:00 pm  
*Blue Man Group*

### FRIDAY, SEPTEMBER 19

*All meetings are on the following schedule:*

7:30 am – 8:30 am *Breakfast*  
8:30 am – 11:30 am *Meeting*  
11:30 am – 12:30 pm *Lunch*  
12:30 pm – 5:00 pm *Meeting*



Experience the mystery, the humor, the euphoria and the indescribable celebration of art, technology and music that is Blue Man Group at Universal Orlando® Resort. It combines science and laughter, and makes for an explosive evening of entertainment. Lose yourself in the incredible performances, the astounding music, and the captivating stage show.

## HOTEL INFO



### ROSEN SHINGLE CREEK

9939 Universal Blvd. | Orlando, Florida | 32819  
P 866.996.9939 | W [www.rosenshinglecreek.com](http://www.rosenshinglecreek.com)

The hotel is a convenient 15 minute drive from the Orlando International Airport.

#### RESERVATIONS

Click here to book your room. See special rates for golf, spa and parking using this link.

Or call **866.966.6338**.

Mention Professional Association of Small Business Accountants to receive the group rate.

Complimentary guest room internet has been arranged by PASBA.

GROUP RATE \$122/night

HOTEL CUTOFF August 18, 2014