

REGISTRATION & AGENDA INFO

- Online at www.nysscpa.org/nextgen15
- By phone at (212) 719-8383 or (800) 537-3635. Call for group discounts.

Friday, July 31, 2015
14 Wall Street
 19th Floor,
 New York, NY 10005
 (Also online)

PROGRAM DETAILS:

Time: 9:00am–5:15pm
Field of Study: Specialized Knowledge and Applications
CPE Credit: 8
Course Code: (In-Person); 25000611
 (Live Webcast) 35000611
Member Price: (In-Person) \$199
 (Live Webcast) \$199
Nonmember Price: (In-Person) \$324
 (Live Webcast) \$324

Managing Up

Giving Back

Relationship Building

TO REGISTER:
www.nysscpa.org/nextgen15
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NEXT GEN
 THE CONFERENCE FOR YOUNG CPAs
 2015

14 Wall Street NY, NY 10005
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7.31.15

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 HERE,
 MAKE IT ANYWHERE**

8 CPE CREDITS

*NEXTGEN
 conference 2015
 Wall Street, NYC*



**LAYING THE
 TRACKS
 FOR LEADERSHIP**

Are you a new CPA with skyscraping ambition who'll go anywhere as long as it's forward? Learn leadership skills that will one day propel you to the helm of your firm at NextGen Conference 2015—The Conference for Young CPAs. After attending this can't-miss event's jam-packed program of interactive sessions, you'll return to work with the confidence and tools to best guide your early career and its promising future. **REGISTER NOW!**

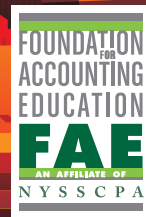
Networking

Technical Edge

Corporate Communication

Time Management

High Performance Team Building



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NEXT GEN THE CONFERENCE FOR YOUNG CPAS 2015

Wall Street, NYC
Learn It Here, Make It Anywhere

7.31.15
WALL STREET, NYC
(ALSO AVAILABLE VIA LIVE WEBCAST)

CONFERENCE AGENDA: NEW YORK 'MINUTES'

8:15–8:55am
Check-In, Continental Breakfast and Networking

8:55–9:00am
Welcome and Opening Remarks

9:00–9:50am
Shaping Your Mindset for Success
What motivates partners to take staff accountants under their wings?

Joseph M. Falbo, Jr., NYSSCPA President (2015-2016), CPA, CGMA
Steer your career's direction on the track to achievement! Learn what qualities firm leaders seek in prospective protégés, then set strategic goals to adopt a mindset focused on making your best impression on bosses and clients alike. Position yourself to meet every need of your firm's clients and exceed the expectations of the practice's partners. The firm's next investment? YOU.

9:50–10:40am
What Goes Into Operating CPA Firms and How Do They Make Money?

Charles Weinstein, CEO, Eisner Amper
Take a close look at the key drivers behind successful CPA firm operations, the nuts and bolts of how firms function and earn, and the

nuances of excelling in a billable environment. Topics include profitability enhancement, a "billable hours" brush-up, client solicitation and retention, trend identification, time management and productivity.

10:40–10:55am
Break

10:55–11:45am
Keeping People "In-the-Know": Communicating to Cultivate Relationships and Inform

Kevin Matz, Esq., CPA, LL.M. (Taxation), Kevin Matz & Associates PLLC
As a purveyor of a "people business," your success as a CPA depends on keeping said "people" well-informed. Hiding behind your email signature is so 2008—hone your skills in real-world communications and their appropriate forms for following up with clients, documenting services and communicating results.

11:45am–12:35pm
Networking: Beyond Schmoozing and Socializing

Steve Krauser, Senior Vice President Retail Operation, Melrose Credit Union
With a little finesse, networking can keep

clients, peers, senior professionals and business partners contented in your orbit as you contribute to theirs. Glean expert tips on how to transform networking from skill to art while increasing your personal brand power.

12:35–1:35pm
Networking Lunch

1:35–2:25pm
Time Management Booster: Balance and Productivity

Somya R. Munjal, CPA, MBA, MAS, CPA for the People, LLP
Find and make time for what's really important. Learn the best practices to increase your efficiency and output on increasingly complex assignments with tight deadlines—all while de-cluttering and balancing your life!

2:25–3:15pm
Timeless Principles of Business Etiquette

Robert A. Shutt, Etiquette Educator, RASolutions.net
Following proper etiquette in business and social settings remains crucial to your advancement. Act like a pro in virtually any interactive situation, whether using the phone, shaking hands, expressing thanks, meeting with clients, or attending social events and business meals.

3:15–3:30pm
Break

3:30–4:20pm
High-Performance Teams: Methods Matter

Scott Hasler, Manager, Bonadio & Company LLP
Team-building skills stand out as some of the most critical tools to cultivate in your professional wheelhouse. Examine how diverse talents, backgrounds and personalities can synergistically combine to identify and achieve clear goals in top-notch professional teams.

4:20–5:10pm
How to Succeed with Your Boss: Do's and Don'ts for "Managing Up"

Somya R. Munjal, CPA, MBA, MAS, CPA for the People, LLP
Hear how "managing up," or consciously working for the mutual benefit of you and your boss—can elevate your own career as well as the growth of your firm. Gain an edge on your competition by understanding your boss's position, different managerial styles, how to deliver and receive feedback, and much more.

5:10–5:15pm
Closing Remarks

Agenda and speakers are subject to change. For the latest updates, including speaker bios, visit www.nysscpa.org/nextgen15

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