

AICPA conference

AICPA National CFO Conference

Renowned speakers, new strategies,
and exceptional networking opportunities

MAY 13-14, 2010

Hilton La Jolla Torrey Pines
La Jolla, CA

Pre-Conference Value-Added Workshops: Wednesday, May 12th

SAVE \$75!
Register by
3/29/10

Key Topics:

- >> Strategic Planning: Critical Role for CFOs
- >> CFO Hot Topics
- >> Business Impact of New Healthcare Legislation
- >> CFO Toolkit: Options For Survival in a Volatile Economy



Hotel Reservation Cut-Off Date: 4/13/10

AICPA®

www.cpa2biz.com/conferences

888.777.7077

AICPA National CFO Conference

New this year! Maximize your networking opportunities with a pre-conference discussion and reception, both complimentary. Also, stay until Saturday for post-conference networking activities: relax at the spa or get active playing golf or tennis—all with fellow colleagues.

PRE-CONFERENCE

WEDNESDAY, MAY 12 / OPTIONAL NETWORKING (complimentary)

5:00 pm - 6:00 pm

Open Forum Discussion: Imagine the CFO World If...

This interactive and informal session is facilitated by CFO members of the Planning Committee. Please bring your questions and topics for discussion.

6:00 pm - 7:00 pm

Welcome Reception and Wine Tasting

Attendees will have an opportunity to taste local wines while meeting speakers, peers and committee members.

POST-CONFERENCE

SATURDAY, MAY 15 / OPTIONAL NETWORKING

Golf Outing

Come play on the North Course at the famous Torrey Pines Municipal Golf Course.

**Relax at The Spa
Torrey Pines**

Receive a 15% discount on spa services when you make your appointment in advance.

Tennis Anyone?

Join your fellow tennis players for a little Round Robin from 11:00am-1:00pm.

Cost is \$20 per person and includes rackets and balls.

For more information about these activities, please refer to the Conference Website.

Steering Committee

Chair

Brad Sparks, CFO, Laredo Oil, Inc., Scottsdale, AZ

Members

Beth Nilsen, CFO, West Yost Associates, Davis, CA

Ralph Bender, CFO, Manship Media, Baton Rouge, LA

Donna Mackenzie, CFO/VP Operations, IZEA -
Innovations in Social Media,
Orlando, FL

Brenda Morris, CFO, Icicle Seafoods,
Seattle, WA

Chuck Mitman, President, Prism eSolutions,
King of Prussia, PA

AICPA Staff

Melinda Arndt, Conference Logistics, AICPA, Durham, NC

Sandra McMahon, Senior Project Manager, AICPA, Durham, NC

Kayla Briggs, Senior Technical Manager, AICPA, Durham, NC

An Eco-Friendly and Paperless Initiative

In an effort to be more environmentally friendly, cost conscious and forward-thinking, AICPA Meetings & Conferences is offering participants access to conference materials via a speaker materials website in advance of the conference.

***Conference manuals with session outlines will not be provided onsite**

BENEFITS JUST FOR ATTENDEES!

*Be sure to supply a valid email address when registering. Instructions to access the speaker materials website [www.AICPAConferenceMaterials.com] are distributed via email approximately two weeks prior to the start of the conference. Also, add service@aicpa.org to your safe sender list.

HILTON LA JOLLA TORREY PINES

Experience majestic sunsets over the Pacific Ocean as you finish play on the legendary Torrey Pines Golf Course. The newly renovated Hilton La Jolla Torrey Pines, a Four-Diamond award-winning hotel, is nestled among the bluffs of La Jolla—yet close to all that San Diego has to offer. This exceptional resort combines a perfect conference venue with a perfect recreational opportunity.



Register by 3/29/10 SAVE \$75!

AICPA National CFO Conference

RECOMMENDED CPE CREDIT: 21 (main) up to 4.5 (optional)

Dear Colleagues,

As the global economy slowly begins to recover, it's important for CFOs to understand the new dynamics, and focus on bringing vision and value to their organization.

That's why I urge you to attend this power-packed, informative two-day conference filled with insights and ideas for the coming year. You will have the opportunity to hear leading experts—on a national and global level—give their opinions on the shape of the current business environment, and provide you with a wealth of solutions that will help you succeed.

Attend sessions featuring a diverse group of high-level thought leaders:

- **David Blackwell**, President & CEO, Sustainable Business Development Services, and Former VP & CFO, International Retail Division, Wal-Mart
- **Terry Ashwill**, former CFO, Carlson Companies & Perot Systems
- **James Glassman**, Managing Director & Chief Economist, JPMorgan Chase & Co.
- **David Greschler**, Director of Virtualization & Management Strategy, Microsoft
- **Robert J. Zatta**, Senior Vice President & Chief Financial Officer, Rockwood Holdings
- **Christiane Ohlgart**, Project Leader for Global IFRS Rollout, SAP AG
- **Robert Friedrichs**, CFO, United Healthcare
- **Cynthia Jamison**, CFO, National Director of CFO Services, Tatum, LLC
- **Steve Winningham**, CFO, Lloyds of London,

in addition to a long list of other notable speakers.

You will benefit from exceptional networking opportunities, interact with the industry's best and brightest, and develop new contacts on a national level. A number of receptions and lunches provide the backdrop to share insights and experiences with others. You can also maximize networking opportunities during our interactive Open Forum CFO Discussion and Wine Tasting Welcome Reception on Wednesday, May 12th.

The 2010 **AICPA National CFO Conference** will provide the information and guidance you need to effect positive leadership in the future, and make the recovering economy work for your organization.

Sincerely,



Brad Sparks
CFO, Laredo Oil, Inc.

HOT TOPICS:

- ▶ **Global Economic Forecast**
- ▶ **CFO Role in Managing IT**
- ▶ **Business Sustainability**
- ▶ **Business Leadership in Uncertain Times**

WHO SHOULD ATTEND

CFOs, CEOs, COOs, CAOs, CROs, finance directors, investment bankers, directors of treasury, chief audit executives, audit committee members, loan officers, leaders of professional service firms and top level financial executives.

Conference Agenda

Topics, fields of study and speakers are subject to change

FIELDS OF STUDY

A-Accounting **BE-Behavioral Ethics** **BL-Business Law**
BMO-Business Management & Organization **C-Communications** **MKT-Marketing**
P/HR-Personnel/HR **SKA-Specialized Knowledge** **T-TAX**

PRE-CONFERENCE

12:00 pm - 6:00 pm

12:50 pm - 2:00 pm

2:00 pm - 5:00 pm

Select One
Concurrent
Workshop

5:00 pm - 6:00 pm

6:00 pm - 7:00 pm

WEDNESDAY, MAY 12 / WORKSHOPS & DISCUSSION SESSIONS

Registration and Message Center Open

Pre-Conference Solutions Sessions (complimentary)

Solution Sessions Titles and Speakers to be Announced.

Pre-Conference Value-Added Workshops (additional fee)

101 CONFLICT MANAGEMENT BMO

Joan Pastor, Ph.D., Founding Partner, JPA International, Inc., Oceanside, CA

For CFOs to be excellent at their jobs and successful in their careers, they must have excellent negotiation and conflict management skills. At this workshop, you will be introduced to the core components of conflict management skills that will not only provide insight into the nature of the other party's mind, but will also provide numerous strategies for dealing with people in various conflict situations. You will learn:

- Your own style for handling conflict, with its strengths and challenges
- Other people's conflict management styles, along with specific and detailed strategies for handling them
- Managing conflict when it erupts suddenly vs. when you have time to plan out a conflict resolution meeting
- One core step-by-step process to follow for maximum results

102 PUBLIC SPEAKING & PRESENTATION SKILLS: HOW TO DEVELOP AND DELIVER MESSAGES C

Dianne Lee, Marketing Director, West Yost Associates, Davis, CA

Whether it's a conference presentation, board meeting, project interview, or public meeting, you can't reach your audience if they're confused or put to sleep by your slides or delivery. This presentation will provide tips, tools, and tricks for delivering your message, keeping your audience's attention, and leaving them wanting more.

- The Well Dressed Slide: Dos and Don'ts for PowerPoint
- Killed by Bullets: Bulletproofing Your Presentation for Maximum Impact
- Showing What You Mean: Making Effective Visuals from Data, Charts, Graphs and Maps
- Delivery Basics: Your Slides Can Only Do So Much; You Must Do the Rest

Open Forum Discussion (complimentary)

IMAGINE THE CFO WORLD IF... SKA

Facilitators: Brad Sparks, CFO, Laredo Oil, Inc., Scottsdale, AZ

Beth Nilsen, CFO, West Yost Associates, Davis, CA

Ralph Bender, CFO, Manship Media, Baton Rouge, LA

Donna Mackenzie, CFO/VP Operations, IZEA - Innovations in Social Media, Orlando, FL

Brenda Morris, CFO, Icicle Seafoods, Seattle, WA

This interactive session will give participants a unique opportunity to discuss a wide range of critical CFO topics—issues, innovations and challenges—with other CFOs and CEOs. Topics may include SOX, re-engineering industries for the future, etc.

Facilitators will include members of the Conference Planning Committee. The audience will consist of conference speakers, colleagues and peers, representing public and private companies across the nation and around the globe. Bring questions and ideas for discussion.

Welcome Reception – Wine Tasting

MAIN CONFERENCE

6:30 am - 6:25 pm

6:30 am - 8:00 am

THURSDAY, MAY 13 / DAY ONE

Registration and Message Center Open

Continental Breakfast

Register by 3/29/10 SAVE \$75!

7:00 am - 7:50 am

Early Riser Breakfast Session

MOVING YOUR FINANCIAL APPLICATIONS TO THE CLOUD

Marc Linden, CFO, Intacct, San Jose, CA

If you've thought about cloud financials but aren't sure it's the right solution for you, join us for this Early Riser session! We'll define cloud accounting and the benefits you gain—including processing efficiencies, cost savings and headcount reductions—by moving your financial applications into the cloud. This session will discuss:

- Why cloud computing is revolutionary for finance organizations
- What's different about cloud financials compared to traditional accounting software
- How you can deliver real-time information and key business performance metrics to both internal and external stakeholders, anytime, anywhere
- How to speed consolidation, reporting and analysis across multiple business entities
- How to reduce your dependence on IT

7:50 am - 8:00 am

Introductory from Conference Chair

8:00 am - 9:00 am

General Session

1 BUSINESS SUSTAINABILITY BMO

David Blackwell, President & CEO, Sustainable Business Development Services, LLC, Rogers, AR

David started Sustainable Business Development Services in 2009 to provide strategic planning, business and people development services to commercial and nonprofit companies and organizations. Previous to his current role, he was Vice President of Strategy for Wal-Mart International. He was responsible for developing the strategic direction of the division along with optimizing its portfolio through capital allocation and expansion into new markets.

Hear about business sustainability issues, advantages and challenges from someone who has experienced it—David Blackwell, the former VP & CFO, International Retail Division, Wal-Mart. The Sustainability movement will be significant to the future viability of companies. The economic impacts can be positive or negative from the environmental, social and business trends developing globally. This session will discuss:

- Global trends that will impact surety of supply of raw materials and products
- Evolving metrics and expectations of your customers and other stakeholders
- Social demands on your supply chains and business practices
- New competitors: entrepreneurs and technology

9:05 am - 10:05 am

General Session

2 CFO HOT TOPICS SKA

Moderator: Brad Sparks, CFO, Laredo Oil, Inc., Scottsdale, AZ

**Panelists: Terry Ashwill, Former CFO, Carlson Companies & Perot Systems, La Jolla, CA
Robert J. Zatta, Senior Vice President & Chief Financial Officer, Rockwood Holdings, Inc., Princeton, NJ**

Brad Sparks is currently CFO of Laredo Oil, Inc. He was previously CEO of Visualant and CFO of WatchGuard Technologies, Inc. He was also the founder and managing director of Sunburst Growth Ventures, LLC. He also founded Pointer Communications and served as CFO for several telecommunications companies.

Terry Ashwill has recently served as Chief Administrative Officer and CFO of Perot Systems Corporation, a global provider of technology-based business solutions. He also served as Chief Financial Officer of both True North Communications, and Carlson Companies, Inc.

Robert Zatta is Senior Vice President & Chief Financial Officer of Rockwood Holdings, Inc. He was previously VP, Corporate Development and Strategic Planning at the Campbell Soup Company. He also held senior finance positions at General Foods Corporation and Thomas J. Lipton, Inc.

What are the key issues facing CFOs in this challenging economy? How have other organizations effectively addressed these issues? Hear panelists Terry Ashwill and Bob Zatta, with their wealth of CFO experience, present their points of view on the topics they feel are most pressing for today's CFO in this challenging economy. Their experience in dealing with past issues will help you formulate approaches to new issues that arise in your business, and they will share their opinions on issues surfaced by participants in this free-wheeling session.

Conference Agenda

10:20 am - 11:10 am

General Session

3 IFRS IMPLEMENTATION IN A GLOBAL COMPANY: SAP AG A

Christiane Ohlgart, Head of Subsidiary Accounting Team, Corporate Financial Reporting, SAP AG, Walldorf, Germany

Christiane Ohlgart was the project leader for the global introduction and rollout of IFRS at SAP. In her current role, Christiane and her team monitor the accounting of SAP's subsidiaries, develop SAP's accounting guidance and policies, and train the entities in all aspects of U.S. GAAP and IFRS accounting questions.

Learn how SAP planned and managed its own project of transition to IFRS reporting, including:

- Necessary business and IT changes
- Analyzing differences and establishing accounting guidelines under IFRS for all reporting entities
- Managing parallel ledgers (IFRS, U.S. GAAP and local GAAP)
- Engaging local entities and auditors to ensure a smooth introduction

11:15 am - 12:15 pm

General Session

4 GLOBAL ECONOMIC FORECAST SKA

James Glassman, Ph.D., Senior Economist, JPMorgan Chase & Co., New York, NY

James Glassman works closely with the firm's chief investment officer, commercial banking, investment banking, and government relations groups. He publishes independent research on the principal forces shaping the economy and financial markets. Mr. Glassman's views are widely cited in the financial media, where he is a frequent commentator on economic policy issues.

This session will discuss the prospects for the emerging U.S. and global economic recoveries, and the implications for policies and markets. The presentation will focus on the long-term challenges, including the fiscal options posed by the dire outlook for the government's healthcare obligations.

12:15 pm - 1:15 pm

Lunch

12:45 pm - 1:15 pm

Luncheon Presentation

L1 SOCIAL MEDIA AND THE CFO MKT

Donna Mackenzie, CFO/VP Operations, IZEA - Innovations in Social Media, Orlando, FL

During this session, you will learn that the increased usage of social media provides numerous opportunities and challenges for CFOs. As CFOs, you can use social media resources to your best advantage for marketing, hiring employees, surveys, etc. Learn about innovative methods and applications.

1:15 pm - 2:15 pm

Concurrent Sessions

*Select One
Concurrent
Session*

5 TECHNICAL HEALTHCARE UPDATE: BUSINESS IMPACT OF NEW HEALTHCARE LEGISLATION SKA

Moderator: Ralph Bender, CFO, Manship Media, Baton Rouge, LA

Panelists: Robert Friedrichs, CFO, United Healthcare, Atlanta, GA

Leon A. Golemi, Business Consultant, Benefit Consultants and Administrators, Inc., Covington, LA

This session will address the healthcare, insurance and benefits crisis. Speakers will provide an update on current issues and discuss the impact of legislative and health insurance changes. The topics will include:

- Effects on medical providers
- Mandates and penalties for employers
- Where do we go from here?
- Impact on consumers and employees
- Costs, contributions and taxes

Register by 3/29/10 SAVE \$75!

Conference Agenda

5:15 pm - 6:25 pm

General Session

11 GET WHAT YOU WANT WITH WHAT YOU'VE GOT: COMMUNICATIONS C

Christine Cashen, MAEd, CSP, Professional Speaker, A Dynamic Speaker, Highland Village, TX

We are all being asked to do more with less. Join Christine in her worldwide campaign to "STOP GLOBAL WHINING." You have what it takes right now to make a difference.

After this program you will:

- Enhance communication to build relationships/teams
- Discover quick and easy tips to have more time and energy
- Have practical and creative strategies for less stress and more fun in all areas of your life

6:25 pm - 7:25 pm

Networking Reception

MAIN CONFERENCE

FRIDAY MAY 14 / DAY TWO

7:00 am - 5:15 pm

Registration and Message Center Open

6:50 am - 7:50 am

Continental Breakfast

7:00 am - 7:50 am

Early Riser Breakfast Sessions

Select One

201 CORPORATE SCANDALS – ETHICS BE

Early Riser

Steve Austin, CPA, MBA, Firm Managing Partner, Swenson Advisors, LLP, San Diego, CA

Session

The world of accounting and auditing has addressed some very significant ethics failures, particularly since 2002. While SOX, PCAOB, and COSO have provided the industry with tools and certain disciplines, we still experience some seismic shocks, particularly in regard to recent Ponzi schemes and challenges in assessing the type of financial risks that have led to the global crisis of the last two years.

Mr. Austin will outline some innovative tools, and the need to reward strong ethical behavior in business schools and today's corporate environment. These tools will bring a fresh look to:

- "Tone at the Top" • Long-term rewards for accountability
- Focus on the economic benefits of ethical behavior
- How to communicate corporate values in today's environment

202 IFRS FOR SMALL AND MEDIUM-SIZED ENTITIES A

Paul H. Munter, CPA, Partner, KPMG, New York, NY

U.S. private companies without public accountability are permitted to use IFRS for SMEs for general purpose financial reporting. The SME standards have the advantage of greater stability; only being changed approximately every three years and having significantly reduced disclosures. What other things should a U.S. private company consider, and what do the SME standards require? These issues will be discussed during this session.

7:50 am - 8:00 am

Chair Remarks

8:00 am - 9:00 am

General Session

12 BUSINESS LEADERSHIP IN UNCERTAIN TIMES SKA

Speaker TBD

How can CFOs develop strategic plans, manage risk and ensure profitability for their companies in these challenging times? What are the primary areas of focus? What are the key opportunities?

9:05 am - 10:05 am

General Session

13 THE CFO ROLE IN MANAGING IT BMO

David Greschler, Director of Virtualization & Management Strategy,

Microsoft Corporation, Redmond, WA

Prior to joining Microsoft, David Greschler was co-founder of Softricity, the originator and leading vendor in the application virtualization industry, which was acquired by Microsoft in 2006. David has held various positions at the MIT Media Lab and the Computer Museum, and holds numerous virtualization patents.

Computing is transforming from being on-site and product-based to a hosted model that turns software and infrastructure into services. Learn about the technologies that enable this major shift, including virtualization, cloud computing and software as a service, and what Microsoft is doing to make this transformation a reality. Then explore the issues CFOs are facing as their IT organization moves to a services model, including:

- OpEx vs. CapEx • Offsite vs. onsite
- Full-time employees vs. outsourced workers

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AICPA National CFO Conference

10:25 am - 11:25 am

General Session

14 CFO TOOLKIT: OPTIONS FOR SURVIVAL IN A VOLATILE ECONOMY BMO

Cynthia Jamison, CPA, MBA, CFO, National Director of CFO Services, Tatum, LLC, Chicago, IL

Cynthia Jamison is a Partner and National Director of CFO Services for Tatum, the only national executive services firm focused exclusively on supporting the office of the CFO. Her unique perspective as a veteran CFO has helped make her a nationally regarded expert on issues and trends in the role of the CFO.

CFOs have had increased visibility and leadership over the past 18 months as all eyes remain on the economy. Predicting the future has never been trickier. Whether this recession ends up being shaped like an “L”, a “W”, “U” or “V”—what are the ways to best prepare yourself and your company for the array of possibilities?

11:30 am - 12:30 pm

General Session

15 OPTIMIZE YOUR FUTURE: TRENDS & IMPLICATIONS FOR CFOs AND THEIR ORGANIZATIONS SKA

Joyce Gioia, President/CEO, The Herman Group, Austin, TX

Joyce Gioia is a Strategic Business Futurist, Certified Management Consultant, Certified Speaking Professional, and a founding member of the Association of Professional Futurists. She is featured regularly in national media like *The Wall Street Journal*, *Industry Week, Inc.*, *The Christian Science Monitor* and numerous trade journals.

Are you ready for the future? To distinguish yourself as “best in class,” you must know what’s coming so you can begin to position yourself now for success. In this fast-paced and entertaining presentation, you’ll:

- Discover how the coming economic recovery presents both opportunities and threats, and how knowing them will keep you ahead of the curve
- Explore how the Workforce AgeWave will affect you and your organization
- Find out about compliance trends and what you need to do now to avoid the pitfalls
- Learn about the vulnerabilities associated with high employee turnover and what to do about them
- Think about how psychographic trends will affect both your internal and external customers, and what you will need to do to respond to these changes

12:30 pm - 1:30 pm

1:00 pm - 1:30 pm

Lunch

Luncheon Presentation

L2 AICPA UPDATE SKA

Paul H. Stahlin, Vice Chair, AICPA Board, and Regional President, Skylands Community Bank, Belle Mead, NJ

Change in the accounting profession is continuing at a rapid pace. Learn what is on the horizon from the Vice Chair of the AICPA Board and what it means to you.

1:30 pm - 2:45 pm

Select One
Concurrent
Session

Concurrent Sessions

16 ACCOUNTING TRENDS UPDATE A

Paul H. Munter, CPA, Partner, KPMG, New York, NY

This session will provide an update on recent accounting standards and standard setting activities currently underway. It will also address key financial reporting issues that are the focus of regulators.

17 NEGOTIATION STRATEGIES SKA

William Swedish, MA/ABS, President, Swedish Consulting, Mukilteo, WA

Negotiating can be a difficult, complex and stressful process for many. How do we know we got the best deal possible? What constitutes a “successful” negotiation? How can we proactively approach a negotiation to help ensure the best possible outcome? This session will:

- Help you understand the importance of planning and strategizing for a successful negotiation
- Review fundamental steps in negotiating, and stress the importance of executing them in the right sequence
- Discuss the role that negotiating style plays in determining the ultimate outcome
- Expose you to frequently used negotiating tactics to help prevent these tactics from derailing the process
- Discuss the difference between productive and counterproductive tactics

Conference Agenda

2:50 pm - 4:05 pm

*Select One
Concurrent
Session*

Concurrent Sessions

- 18 FRAUD IS ON THE RISE: HOW YOUR EMPLOYEES ARE COOKING YOUR BOOKS... AND MORE** BMO

John J. Hall, CPA, President, Hall Consulting, Vail, CO

In any organization, fraud risks from employees are significant simply because employees are an integral part of the control environment that was established to prevent fraud and other wrongdoing. Proper segregation controls over initiation, approval, and recording of transactions and other activities will lessen this risk. Healthy skepticism at the transaction review and approval stage, coupled with meaningful after-the-fact review of transaction results and exception reports, are among the most important anti-fraud controls an organization should have in place. This session will address:

- Employee fraud exposures and case examples
- Creating and maintaining an anti-fraud business environment
- Effective monitoring of employee activities
- The critical fraud policy
- How to keep fraud prevention and employee trust in balance

- 19 THE HARD ECONOMICS OF SOFT SKILLS DEVELOPMENT: HOW TO EVALUATE ROI P/HR**

William Swedish, MA/ABS, President, Swedish Consulting, Mukilteo, WA

Are "soft skills" really soft? Are they "nice to have," or are they critical to any organization's success? This session will explore these questions and discuss an approach to determining the value of employee soft skill development that suggests there are "hard" bottom line benefits involved. At this session, you will learn more about:

- The definition of soft skills and the role these skills play in effective work performance
- The approaches some large organizations are taking to valuing their soft skill development programs
- The relationship between soft skill development and profitability
- Ways to identify costs that represent waste due to a lack of soft skill development in the organization
- Why tough economic times call for more, not less, soft skill development

4:15 pm - 5:15 pm

General Session

20 STRATEGIC PLANNING: CRITICAL ROLE FOR CFOs BMO

Lawrence M. Bienati, Ph.D., SPHR, CCP, Senior Principal, Consultants to Management, Benicia, CA

This highly interactive session will share over 30 years of best practice information on how to facilitate a successful strategic planning process. The emphasis will be on how strategic planning, done right, can lead to high levels of employee engagement, while driving successful business results. More than 75% of typical strategic planning interventions in either the public, private or not-for-profit sectors are subject to failure because the offsite sessions, or established processes, lack practicality, focus, engagement of the key stakeholders, alignment, proper execution and measurement. This session will present a view of both the art and science of effective strategic planning. Participants will receive a toolkit and other practical resources to successfully launch the process in their organizations.

5:15 pm

Conference Adjourns

POST-CONFERENCE

SATURDAY, MAY 15 / OPTIONAL NETWORKING

Golf Outing

Relax at The Spa Torrey Pines

Tennis Round Robin

See page 2 and the Conference Website for more details.

Register by 3/29/10 SAVE \$75!

Registration

4 WAYS TO REGISTER FAST

ONLINE*: www.cpa2biz.com/conferences PHONE*: 888.777.7077 or 919.402.4500

FAX*: 800.870.6611 or 919.419.4795

MAIL: Complete and mail the form along with your promotion code and payment to:
AICPA Member Service Center, Conferences, 220 Leigh Farm Road, Durham, NC 27707-8110

*Credit card registration only (AICPA Visa®, American Express®, Diners Club®, Discover®, MasterCard® or VISA®)

RECOMMENDED CPE CREDIT 21 (main) up to 4.5 (optional)

This conference was prepared in accordance with the Joint AICPA/NASBA Statement on Standards for Continuing Professional Education (CPE) Programs effective on January 1, 2002. The recommended CPE Credits are in accordance with these standards; however, your individual state board is the final authority on the acceptance of programs for CPE credit.

CONFERENCE FEE

Registration fees are determined by current membership status in the AICPA. Please indicate member number on the registration form to obtain the correct discount. Conference fee includes all sessions, conference materials, continental breakfasts, refreshment breaks, luncheons and a reception. Fee for optional workshops includes all session materials and refreshment breaks.

GROUP REGISTRATIONS

Registration for 2 or more individuals per firm may qualify for group discounts; additional savings may be available for groups of 10 or more. For more information please email aicpalearning@aicpa.org and indicate "Group Conference Sales" in the subject line or phone 800.634.6780, choose option 1. **Program Code: CF010**

CANCELLATION POLICY

You may cancel without penalty if written cancellation requests are received by March 29, 2010. Due to financial obligations incurred by the AICPA, a credit voucher less 50% of the registration fee will be issued for written requests received by April 22, 2010. No refunds or credits will be issued on cancellation requests received on or after April 23, 2010. For further information, call the AICPA Service Center at **888.777.7077**.

HOTEL AND GROUND TRANSPORTATION INFORMATION

Contact the hotel directly to obtain their policy on reservations, deposits and cancellations. Rooms will be assigned on a space-available basis only. Note, this conference is expected to sell out, so please make hotel arrangements as soon as possible. To receive our special group rates mention that you will be attending the **AICPA National CFO Conference**.

Hilton La Jolla Torrey Pines Hotel Phone: 858.558.1500
10950 North Torrey Pines Road Hotel Reservations: 1.800.HILTONS
La Jolla, CA 92037 Hotel Room Rate: \$225 single/double
Hotel Reservation Cutoff Date: April 13, 2010

Ground Transportation — to and from the hotel and airport (please note, rates and times are approximate) **Taxi Service:** \$45-\$50 each way, 30 minutes each way **Hotel Parking:** Self-Park \$20 for overnight guests; Valet \$25 for overnight guests

AIRLINE INFORMATION

The AICPA has a special arrangement with Maupin Travel, Inc. of North Carolina to assist you with your travel arrangements. This travel agency may be reached at 800.345.5540. If you prefer to make your own travel plans, be sure to mention the participating airline's reference number (listed below) to take advantage of deeply discounted "Zone Fares" that do not require a Saturday night stay-over. Discounts are valid for round trip registered AICPA meetings or conferences only. Some restrictions may apply.

American Airlines 800.221.2255 Index #19956
United Airlines 800.521.4041 Refer to Meeting ID #531SI
Delta Airlines 800.328.1111 Refer to Meeting ID #NY2AC
JetBlue Airways www.jetblue.com/promo Use Code: CF010

For up-to-date airline information regarding special travel discounts, please visit www.cpa2biz.com/conferences. Due to recent airline industry fare restructuring, we cannot guarantee that the above group travel agreements will be in effect at the time when you are making your travel arrangements. Please contact the airline and/or your travel agency for latest applicable discounts and arrangements.

CAR RENTAL

Hertz Car Rental — AICPA Member Discounts: Call 800.654.2240. Ref. Code CV#021H0017.

Airline and car rental discounts are available only when you or your travel agent book through the 800 number.

We strongly advise you to confirm your conference registration and hotel reservation prior to making your travel plans.

The AICPA is not liable for any penalties incurred if you cancel/change your airline reservations. Rates are subject to availability.

EXHIBIT AND SPONSORSHIP OPPORTUNITIES

Don't miss the opportunity to present and sell your organization's services and products to thousands of CPAs and financial professionals at AICPA conferences. For detailed information on conference exhibit and sponsorship opportunities, please send your email to exhibit@aicpa.org.

AICPA conference

AICPA/CPA2Biz
220 Leigh Farm Road
Durham, NC 27707

AICPA National CFO Conference

www.cpa2biz.com/conferences

888.777.7077

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>> Register by 3/29/10 SAVE \$75

MEMBERSHIP INFORMATION

Very important — please be sure to complete.

AICPA Member? Yes No

Membership No. (Required for discount prices)

NICKNAME FOR BADGE _____ BUSINESS TELEPHONE _____

TITLE _____

E-MAIL ADDRESS _____

REGISTRATION INFORMATION

Please photocopy this form for additional registrants.
If the information on your label is incorrect, please complete the following:

LAST NAME _____ FIRST NAME _____ MI _____

FIRM NAME OR AFFILIATION _____

STREET ADDRESS _____ SUITE _____ PO BOX _____

CITY _____ STATE _____ ZIP _____

In accordance with the Americans with Disabilities Act,
do you have any special needs? Yes No (If yes, you will be contacted.)

10CPA-270 CFO10 051310

CONFERENCE FEES: Please circle appropriate rate.

MAIN CONFERENCE (CFO10)

Early Bird Registration **AICPA Member \$1,050 Non-member \$1,350**

SAVE \$75 by 3/29/10

Regular Registration **\$1,125 \$1,425**

PRE-CONFERENCE WORKSHOPS – Wednesday, May 12 (additional fee)

2:00 pm - 5:00 pm (select one) **\$225 \$225**

101 Conflict Management

102 Public Speaking & Presentation Skills:

How to Develop and Deliver Messages

POST-CONFERENCE NETWORKING OPPORTUNITIES

Golf

Tennis Round Robin

Spa

See Conference Website for details and pricing.

PAYMENT INFORMATION Full payment must accompany registration form.

My check for \$ _____ payable to **AICPA** is enclosed.

OR Please bill my credit card for \$ _____.

AICPA VISA® American Express® Diners Club®

Discover® MasterCard® VISA®

CARD NO. _____ EXP. DATE _____

BILLING NAME _____

SIGNATURE _____

_____ AICPA USE ONLY — CFO10

Customer No.

Promotion Code