

**AMERICAN WOMAN'S SOCIETY OF  
CERTIFIED PUBLIC ACCOUNTANTS**  
2306 Briarbrook Dr.  
Houston, TX 77042-2908

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HOUSTON, TEXAS

**ADDRESS CORRECTION REQUESTED**

**Annual Seminar:** February 4, 2006



**Houston Affiliate**

**Presents**

***Bankruptcy, Internal Auditing,  
Tax Updates, and More!***

**23<sup>rd</sup> Annual Seminar**

**Saturday, February 4, 2006**

Location:

H.E.S.S. Club

5430 Westheimer Rd.

Houston, TX 77056

**Sponsored by:**

strategic financial

group, inc

"a partnership of practices"



**You can't predict. You can prepare.®**



7:15 – 7:45 AM  
 Registration and Continental Breakfast

**Breakfast Sponsored by Merrill Lynch**

7:50 – 8:50 AM

**WELCOME AND OPENING SESSION: Business Killers**

Mr. Leake will show videos that depict the potential mistakes business owners might make that could kill his/her business. This session is designed to help an individual or business avoid those mistakes by suggesting possible solutions. Topics include business continuity and succession planning.

*Speaker: Wm. Fields Leake, Certified Family Business Specialist, Strategic Financial Group, Inc.*

**TRACK 1**

**TRACK 2**

9:00 – 9:50 AM

**Pension Developments & Fiduciary Safety**

A little known section of EGTRRA becomes effective in 2006, the Roth 401k or 403b. Can this type of contribution help you or your clients? How do you think your retirement plan would fare in a Department of Labor Audit? Would the new protection programs from 401(k) vendors really help? You will learn how to integrate these new developments into your practice.

*Speaker: Kellie D. Elder, CPC, QPA, Nationwide Financial*

**Annual Tax Update – Individual**

This session will focus on developments in individual income taxation including recent tax legislation, rulings, and regulations.

*Speakers: Laura Nowicki, CPA, Tax Partner  
 Shelley Moore, CPA, Director, PriceWaterhouse Coopers, LLP*

10:00 – 10:50 AM

**Talking to Clients About Wills  
& Advance Directives**

The focus of this session is to give attendees the information necessary to intelligently bring up or address with their clients wills and other documents that speak for the clients, when they cannot speak for themselves.

*Speaker: Anne-Marie Suire, CPA, JD*

**Annual Tax Update – Corporate**

This session will focus on developments in small business and corporate income taxation including recent tax legislation, rulings, and regulations.

*Speakers: Laura Nowicki, CPA, Tax Partner  
 Shelley Moore, CPA, Director, PriceWaterhouse Coopers, LLP*

11:00 to 11:50 AM

**The Future of Family Limited Partnerships  
In Estate Planning**

Mr. Riddle will use current case studies to support his assumptions about using limited partnerships in estate planning.  
 Level: Intermediate

*Speaker: Michael C. Riddle, JD, Riddle & Brazil, LLP*

**Accountant's Liability**

In this session, Jeff will explain the potential legal liability that accountants and accounting firms face under Texas law, the rules of the Texas State Board of Public Accountancy, federal securities laws, SEC rules, the Sarbanes Oxley Act and the rules of the Public Company Accounting Oversight Board.

*Speaker: Jeffrey S. Johnston, JD, Vinson & Elkins, LLP*

**American Woman's Society of Certified Public Accountants**

*Speaking with one voice for women in the profession.*

Visit our website @ [www.awscpa.org/houston](http://www.awscpa.org/houston)



**12:30 – 1:20 PM**

**LUNCHEON SESSION: Pearls of Wisdom**

This presentation empowers women to champion their individual financial concerns and prepare for the many different financial challenges they will face in life. Video clips supplement the workshop moderator's efforts to bring the real life experiences of women from across America to the workshop audience. Nationally recognized experts offer professional observations and recommend practical solutions that work for today's women facing the challenges and embracing the opportunities life presents.

*Speaker: Wm. Fields Leake, Certified Family Business Specialist, Strategic Financial Group, Inc.*

**TRACK 1**

**TRACK 2**

**1:30 – 2:20 PM**

**Changes Created by the Bankruptcy Abuse Prevention & Consumer Protection Act of 2005**

**The Long Awaited Bankruptcy Reform legislation:**  
 This topic will review the sweeping changes of the Act that will substantially impact both business and personal bankruptcy cases. Participants will gain a rundown on the entire array of changes from the perspective of a Creditors' Right Specialist.

*Speaker: D. Brent Wells, JD, President, Wells & Cuellar, PC  
 Board Certified in Consumer and Commercial Law and  
 Creditors' Rights Law*

**Best Practices in Internal Auditing At Continental Airlines**

Sarbanes-Oxley and the Stock Exchange rules are challenging auditors like never before. In this session you will learn some of the innovative approaches Continental Airlines has implemented to create its leading-edge audit function. Mr. Goepfert will take you on a guided tour of the best practices used by their IA Department, as well as by others, to add value and provide top-notch assurance services. This address will also examine what specific audit tools and techniques are used to implement those best practices.

*Speaker: Steve Goepfert, Sr., CIA, CPA, Staff Vice President-Internal Audit (CAE), Continental Airlines*

**2:30 – 3:20 PM**

**Understanding & Working with Non-Profit Financial Statements**

A guide to understanding non-profit financial statements and issues — ideal for executive directors, board members, development officers, funding organizations and others with financial oversight responsibilities. The session will cover most aspects of financial reporting for non-profits including accounting for temporarily restricted and permanently restricted funds, endowments, and pledges. This workshop includes illustrated examples and practical information to understand non-profit financial statements.

*Speaker: Kay Walthers, CPA, Blazek & Vetterling, LLP*

**Investment Outlook 2006**

The one area that affects us all is the economy. Come listen to an enlightening discussion on what portends for the coming year, including interest rates, corporate profits, inflation, investment diversification and what to expect from the stock market. How should you position yourself and your clients in the coming year?

*Speaker: John Osborn, CFP, CFS, CHFC, BCS, The Pension Professionals*

**3:30 – 4:30 PM**

**CLOSING SESSION: The Power of Authentic Communication**

Learn the key components and the power of authentic communication. See how communication can restrict group and individual performance by discouraging the candid exchange of ideas and opinions. See how communication can create customer loyalty and a fully engaged and empowered team.

*Speaker: Carol Cooper, CPA, President, Carol A. Cooper, PC*

Note: Satisfactory meeting room temperatures are difficult to maintain. Participants may wish to bring a sweater or jacket to ensure comfort.

# REGISTRATION FORM

**Seminar Date:** Saturday, February 4, 2006  
**Pre-Registration Deadline:** Thursday, January 26, 2006  
 (After that date there will be no refunds)

AWSCPA Members: \$150  
 Non-Members: \$165  
 Late Registration: \$ 25  
 (Postmarked after 01/26/06)  
**Make Checks Payable to:** AWSCPA

*Fee includes continental breakfast, lunch, snacks, and 8 hrs. CPE.*

(Subtract \$10 if paid by January 19<sup>th</sup>)

Name: _____	Amount Paid: _____
Address: _____	Business Phone: _____
City, State, Zip: _____	Home Phone: _____
Firm Name: _____	E-Mail Address: _____

***Sorry, but we cannot accept credit cards.***

Concurrent Session Preferences – List 1<sup>st</sup> and 2<sup>nd</sup> choices.

	Track 1	Track 2
9:00 – 9:50		
10:00 – 10:50		
11:00 – 11:50		
1:30 – 2:20		
2:30 – 3:20		

**Mail Registration Form to:**

AWSCPA  
 c/o Susan Taylor  
 2306 Briarbrook Dr.  
 Houston, TX 77042-2908

## General Information



The seminar will be held in Houston, Texas at the H.E.S.S. Club on 5430 Westheimer Rd., between Yorktown and Bering.

The purpose of the American Woman's Society of Certified Public Accountants is to help our members achieve their full potential and to ensure equity within the profession. Our seminar offers a variety of speakers and topics, allowing you to create a seminar experience suited to your needs. Eight hours of continuing professional education credit is available for the full day's attendance.

**Who Made Things Happen? ...  
 The Seminar Committee!**

**Chairperson:** Jane Tillinghast  
 Brenda Banks    Kathryn Harriss  
 Joan Khosla     Anna Marie LaPorte  
 Phyllis Martin    Gilda Mendoza  
 Donna Milulecky    Susan Taylor

To register for the seminar, detach the registration form and mail it to AWSCPA with your payment before January 26, 2006. You will not receive written confirmation of your registration prior to the seminar.

All questions may be addressed to:

Susan Taylor at 281-233-1354 (w), staylora@sbcglobal.net  
 or  
 Jane Tillinghast at 713-681-7558 (w), jtillinghastcpa@aol.com

**Note to Non-Members:** If you join AWSCPA during the seminar, you will be required to pay national dues, but the local affiliate dues will be waived.

All Sessions: Level is Basic except 11:00 Session, Track I  
 No Prerequisites Required

**Note:** Please be aware that since our speakers do not receive compensation, some may have books, tapes, and other materials available for sale.