

WAA CONVENTION SEMINARS AND SPEAKERS

MONDAY - SEPTEMBER 19, 2011

ETHICS and PLANNING FOR COLLEGE AND FAFSA - BY DAVE AND MARY MELLEMM

Dave Mellem, EA Ashwaubenon Tax Professionals, Green Bay WI – David has over 27 years experience in income tax preparation and 26 years experience in tax seminar lecturing. He is a partner of Ashwaubenon Tax Professionals. David also provides research/consulting services for Federal tax matters. An enrolled agent since 1982, he has a Bachelor's Degree in Accounting and Associate Degrees in Accounting and Data Processing. David is an active member of both the NAEA and the NATP.

Mary Mellem, EA Ashwaubenon Tax Professionals, Green Bay, WI – Mary has 21 years experience as a Tax Professional and 14 years experience teaching tax programs throughout the country. She and her husband operate Ashwaubenon Tax Professionals. Mary holds a Bachelor Degree in Secondary Education from the University of Wisconsin in the field of Mathematics and Economics. In 1990, she received the Enrolled Agent designation. Mary is a member of the NAEA and the NATP.

SOCIAL SECURITY AND RETIREMENT PLANS – BY KARYL RICHSON

Social Security is part of the retirement plan of almost every American. If you are among the 96% of workers covered under Social Security, you should know how the system works and what to expect when planning your retirement. Karyl will explain how you qualify for benefits, how your earnings and age affect benefits and how you may qualify for other benefits.

Karyl, Public Affairs Specialist, has been employed with the Federal Government for 39 years. She has been with the Social Security Administration for 33 years. Previous positions held within the agency are Claims Representative and Service Representative. Karyl has extensive knowledge in the programs Social Security administers. As a Claims Representative she processed retirement, disability, survivors and supplemental security income claims. Karyl is responsible for Public Affairs activities in the southern portion of Wisconsin. You can hear her monthly on WRCO-AM radio and numerous times each year on WISN-AM.

TUESDAY – SEPTEMBER 20, 2011

GEAR UP - PRACTICE MANAGEMENT – BY DAVE KREBS

Make more...work less...have fun doing it! This course is designed to teach you the ten secrets to a successful tax and accounting practice. You will develop the relationships with clients and your team so that you can build a firm that has value whether you decide to work or sell it.

Learning Objectives

Upon completion of this course, you should be able to:

- Define your strengths and weaknesses.
- Develop your personal vision.
- Identify how to build your team.
- Develop your marketing strategy to achieve your vision.
- Cultivate pricing and billing methods best suited to your firm.
- Define buy, sell, and merge strategies to enhance your firm's future.
- Develop effective investment advisory techniques.
- Service and retain clients you have generated.
- Identify how to build your team to optimize results.
- Define systems and procedures to make your firm more effective.
- Adapt your firm to align it with the latest trends and technology.
- Learn the latest security and backup techniques.