



**MGI North America
2019 Annual Conference
May 16 - 17, 2019 - New York, NY
Agenda**

Thursday, May 16, 2019

Location

12:00 pm – 1:15 pm	Lunch and Networking with MGI Members and Sponsors	O’Neil – 4 th Fl.
1:15 pm – 2:30 pm	<p>Welcome and Opening Remarks - by <i>Joe Tarasco, MGI North America Regional Director</i></p> <p>MGI NA and International Information Session</p> <ul style="list-style-type: none"> ▪ Introduction of MGI NA Coordinating Committee - by <i>Joe Tarasco</i> ▪ Introduction of the International Committee members - by <i>Ed Fahey, MGI North America International Committee Member</i> ▪ MGI International Report - by <i>Roger Isaacs, Chairman, MGI Worldwide; Ed Fahey; Clive Viegas Bennett, CEO, MGI Worldwide; and Maxine Brock, MGI Worldwide Director of Marketing</i> ▪ MGI North America New Member Presentation ▪ 2019 AGM in Dubai, UAE, October 23 – 25, 2019: Presented by <i>Clive Viegas Bennett and Faiyaaz Rajkotwala, Middle East and North Africa International Committee Member</i> 	Ziegfeld – 4 th Fl.
2:30 pm – 3:00 pm	Break and Sponsor Networking	O’Neil
3:00 pm – 4:00 pm	Sponsor Presentations: SIB Fixed Cost Reduction, Avalara and cPaperless	Ziegfeld
4:00 pm – 5:00 pm	<p>Cyber Liability Exposures and Failures to Detect Fraud Exposures - by <i>Stephen Vono, Senior Vice President of McGowanPRO Insurance</i></p> <ul style="list-style-type: none"> ▪ Personal information has become a leading target of cyber criminals. With access to your client's personal information, understanding your Exposure and taking the appropriate steps to mitigate your liability is essential. Stephen will explain the accounting firm’s role in keeping data safe and ways to protect your firm from lawsuits arising from information security exposures. He will discuss what is and isn’t covered under your professional liability policy, and how an employee dishonesty policy and cyber liability policy will fill in the gaps. ▪ Failure to detect fraud claims continue to happen against accounting firms and claims go beyond the scope of audit services. In this session, Stephen discuss what fraud is and steps you can take to hopefully mitigate this exposure. We will also look at examples of claim scenarios and discuss what could have been done to head-off such claims. 	Ziegfeld
5:00 pm	Closing Remarks - by <i>Joe Tarasco</i>	Ziegfeld
7:30 pm	<p>Dinner – Join fellow MGI members for dinner while overlooking NY’s iconic Times Square. The R Lounge has 360° wrap-around windows and spectacular views from every direction. www.rlounge Times Square.com</p> <p><i>R Lounge Times Square is located @ The NY Renaissance Hotel: 2 Times Square, 714 7th Avenue @ 48th Street</i></p>	R Lounge Times Square

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Friday, May 17, 2019

Location

8:00 am – 9:00 am	Breakfast and Sponsor Networking	O’Neil – 4 th Fl.
9:00 am – 10:00 am	<p>Platinum Sponsor Presentation: Attracting, Retaining and Developing Staff in a Competitive Environment for the Best Professionals <i>- Presented by Frank Tirelli, Vice Chairman of alliantgroup Former Chairman and CEO of Deloitte Italy and Former Vice Chairman and Regional Director of Deloitte USA</i></p>	Ziegfeld – 4 th Fl.
10:00 am – 10:30 am	Break and Sponsor Networking	O’Neil
10:30 am – 11:00 am	Sponsor Presentations: ProfitCents and Engineered Tax Services	Ziegfeld
11:00 am – 12:00 pm	<p>Similarities with the Hospitality Industry and Public Accounting <i>– Presented by Joe Tarasco, Jr., Union Square Hospitality Group</i> The restaurant business and public accounting are two different industries; however, they have similar infrastructures, challenges in attracting, training and retaining qualified staff, succession planning, profitability, crisis management, and competitive sustainability. Union Square Hospitality Group (USHG) has created many of New York’s most beloved restaurants, including Grammercy Tavern, The Modern, Maialino, Marta, and Manhattan. Joe Tarasco, Jr. has been with USHG since graduation from the Culinary Institute of America in 2005, and he is an integral member of their management team. This interactive discussion and presentation will include:</p> <ul style="list-style-type: none"> ▪ The restaurant business and public accounting have similar infrastructures and operational challenges. We will address the best practices to overcome these challenges. ▪ Retaining clients with superior service and hospitality, “People come to a restaurant for food, but they come back for the service and experience.” The same is true when providing commodity accounting and tax services. ▪ Hospitality in any business is a “team sport,” including accounting. We will address best practices at both USHG and public accounting for championship performance in client service. 	Ziegfeld
12:00 pm – 1:00 pm	Lunch and Sponsor Networking	O’Neil
1:00 pm – 2:00 pm	Sponsor Presentations: QuickFee, MindBridge ai, and Receipt Bank	Ziegfeld

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2:00 pm – 3:00 pm

MGI NA Enhanced Growth & Marketing Strategy

Ziegfeld – 4th Fl.

- by *Nancy Damato, MGI NA Director of Marketing*

- Overview of the Marketing and Business Strategy
- Marketing Brochure Template
- MGI NA Website and Social Media
- ENGAGE Conference

MGI NA and Mackrell – Cannabis Law & Accounting Group

- by *Nancy Damato and Nigel Rowley, Managing Partner, Mackrell Turner Garrett*

- Overview of the Strategic Plan
- Initiatives, Opportunities and Next Steps

Cannabis and Hemp Industries - Update and Outlook

- by *Cory Parnell, COO, and Jim Marty, CEO of Bridge West*

O'Neil – 4th Fl.

3:00 pm – 3:30 pm

Break and Sponsor Networking

Ziegfeld

3:30 pm – 5:00 pm

Member Best Practices Panel Discussion

– Moderated by *Joe Tarasco*

For CPA firms to continuously succeed, they need to constantly adjust their best practices in accordance with the marketplace, and their internal resources and capabilities, and “double down” on what works best and eliminate what doesn’t. Our MGI colleagues will share their insights and describe their experiences in identifying and implementing the best strategies and initiatives to achieve their firm’s goals and objectives in the areas of:

- Growth, Marketing and Lead Generation
- Attracting, Developing, and Retaining Professional Staff
- Succession Planning
- Mergers and Acquisitions
- Niche Development, and New and Innovative Services
- Using Technology in Client Service and Operations

4:30 pm

Closing Remarks - by *Joe Tarasco*

7:30 pm

Dinner at the Sky Room: www.skyroomnyc.com

Sky Room Times Square is located @ 330 West 40th Street, 34th Floor

Sky Room
Times Square