

# *Facilitators: Art Kuesel, Kuesel Consulting &*

*Marc Rosenberg CPA, The Rosenberg Associates*

## **J**oining a professional peer group enables CPA firm partners and principals to build beneficial relationships in the CPA community. Meetings are an interactive forum for members to get the pulse on what’s going in the marketplace. You’ll discuss common challenges and solutions, changes and trends in the profession, and gain useful intel from guest speakers, the facilitators and most importantly, *eachother.* Our Roundtable group was founded specifically to serve those partners who, like you, are one of your firm’s “next generation” of leaders.

2018 Topics

## We present a wide variety of valuable content ranging from nationally-recognized speakers on practice management to lively discussions on the latest trends in employee benefits.

Featured speakers and topics for the 2018 term include:

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| Date | Speaker | Topic |  |  |
| May 10 | Art Kuesel, Marc Rosenberg | Tax Season in Review | | |
| June 7 | Carl George, Carl George Advisory | Succession Planning | | |
| July 12 | Jon Lokhorst, Lokhorst Consulting | Leadership Development | | |
| September 27 | Art Kuesel, Marc Rosenberg | Annual Management & Profitability: Survey Results | | |
| October 25 | Russell Shapiro, Levenfeld Pearlstein | M&A and Partner Agreements | | |
| November 15 | Art Kuesel, Marc Rosenberg | “Fix my Problem” Whiteboard Session | | |
| December 13 | Kimberly Ellison Taylor, AICPA | Emerging Trends in the Profession | | |
| January 9, 2019 | Dr. Ann Dzuranin, NIU | Data Analytics Tools & Trends | | |

In Good Company

Join with partners and principals from high-profile firms in Chicago and beyond:

Weiss & Co CDH Chunowitz Teitelbaum & Mandel Cray Kaiser ECS Financial Marcum FSB&W Dam Snell & Tavierne Eder Casella Martin Hood MichaelSilver ORBA Kutchins Robbins & Diamond PBG Financial Pasquesi Sheppard

Porte Brown Sassetti Mowery & Schoenfeld Selden Fox Hechtman Group Warady & Davis



Benefits

* Sharing of ideas and networking with other partners. Members learn how other CPA firms are managed and compare best practices.
* Access to experienced CPA firm consultants/facilitators (Rosenberg and Kuesel).
* Keep abreast of events, issues and trends in the CPA profession.
* **Meetings qualify for CPE credit.**

Format/Venue

Meetings are from 8:30-11:30 am. at Ravinia Green Country Club in Riverwoods, IL. Business casual dress: a continental breakfast is served.

Typical Agenda

* Facilitator summarizes current events in the profession
* Open forum and sharing of best practices – firms bring questions and pressing issues to the group and everyone discusses how they handle them at their firms.
* Presentation by facilitator or outside speaker with emphasis on group discussion. Rotating practice   
  management topics such as profitability, managing staff, partner comp, succession planning, firm governance, etc.

Fees

$1,495 for the year

For More Information

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*-or-*

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