

May 27 - The Tech-Savvy CPA Firm

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In this session, you will learn about a wide variety of technology topics covered in a quick period of time. Your instructor will discuss top software and hardware products for CPAs in addition to common technology strategies for the CPA firm. Discussion points will include how much to spend on technology, security measures, and consulting opportunities. We will also cover a list of minimum technology you should expect to have in your firm (computers, LANs, printers, cell phones) in addition to optional technology you may want to have such as a projection system, hand-held devices, paperless scanners, digital cameras, etc. We will discuss the effectiveness of maintaining a web site, FTP site, and remote access site. Software applications to be discussed include time and billing, write up, accounting, tax preparation, audit lead schedule, fixed assets, payroll, e-mail, CRM, and other personal productivity tools. The objective of this session is to help CPA firms identify possible new technologies and strategies to help them better achieve their goals in a cost efficient manner.