>> SAVE $100! REGISTER BY MAY 3

>> FEATURING TOMMY STEPHENS, VAL STEED AND STEVEN PHELAN

>> BONUS! EARN UP TO 17 CPE CREDITS
KNOW YOUR OPTIONS

HARNESS TECHNOLOGY FOR OPTIMAL RESULTS

When it comes to technology, you have options upon options. You have options for working more productively, more collaboratively and more securely. But how do you really know which options are best for you or your organization? Featuring the experts of K2 Enterprises, the MNCPA Technology Conference cuts through all the noise and provides practical tips, tools and guidance for harnessing today’s technology. Learn how to put new and improved software offerings and functionality to work for you. Find out what’s needed for setting up successful virtual teams and collaborative work environments. See how to protect your systems and data from hackers, phishers and other tech-savvy criminals.

SCHEDULE

**Day One: Tuesday, May 21**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session A1: Tech Update: Today’s Biggest Trends, Solutions and Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30 – 10:10 a.m.</td>
<td></td>
</tr>
<tr>
<td>10:25 a.m. – 12:05 p.m.</td>
<td>B1. Bringing Artificial Intelligence to Your Excel Workbooks</td>
</tr>
<tr>
<td>12:55 – 2:35 p.m.</td>
<td>C1. Blockchain and Emerging Technologies</td>
</tr>
<tr>
<td>2:50 – 4:30 p.m.</td>
<td>D1. Going Virtual: Technologies to Support Remote Team Members</td>
</tr>
<tr>
<td>4:40 – 5:30 p.m.</td>
<td>BONUS SESSION: Microsoft Teams: Bringing Your Team Together</td>
</tr>
</tbody>
</table>

**Day Two: Wednesday, May 22**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session E1: The Best of the Best: Office Productivity Boosters</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30 – 10:10 a.m.</td>
<td></td>
</tr>
<tr>
<td>10:25 a.m. – 12:05 p.m.</td>
<td>F1. Excel Power Query: 10 Things You Need to Know</td>
</tr>
<tr>
<td>12:50 – 1:40 p.m.</td>
<td>G1. Improving Communications With Effective Visualizations</td>
</tr>
<tr>
<td>1:45 – 2:35 p.m.</td>
<td>H1. Sales Tax Compliance in a Post-Wayfair World</td>
</tr>
<tr>
<td>2:50 – 4:30 p.m.</td>
<td>I1. Excel’s Best New Features</td>
</tr>
</tbody>
</table>
DAN ONE: TUESDAY, MAY 21

8 – 8:30 a.m. | Check-in, Continental Breakfast

8:30 – 10:10 a.m. | General Session

A1. Tech Update: Today’s Biggest Trends, Solutions and Opportunities

Thomas G. Stephens Jr., CPA.CITP, CGMA, K2 Enterprises

What technology trends are affecting your business? Which ones could revolutionize the way you operate? Get the answers in this important update as you explore a variety of technology trends, solutions and opportunities. Identify innovative applications to maximize your productivity and increase security. Receive helpful tips on software licensing issues, leading-edge hardware, mobile and cloud strategies, and much more.

FOS: Information Technology – Technical (2)

10:10 – 10:25 a.m. | Refreshment Break

10:25 a.m. – 12:05 p.m. | Breakout Sessions B

B1. Bringing Artificial Intelligence to Your Excel Workbooks

Thomas G. Stephens Jr., CPA.CITP, CGMA, K2 Enterprises

Excel Workbooks + artificial intelligence = a big boost in productivity. Discover how to save time and improve accuracy as you explore Microsoft Office’s advanced features that combine Excel and several other AI-powered additions. Gain firsthand experience working with Excel’s new data types and learn how to create formulas that work with Dynamic Arrays.

FOS: Computer Software & Applications – Non-Technical (2)

B2. Everything Google: How to Utilize Tools, Services and More

Val D. Steed, CPA.CITP, MA, K2 Enterprises

Most people are familiar with Google Search and Gmail. But far more lies below Google’s surface. Delve into its most useful features, apps and services, and learn how to incorporate them into your own practice. Find out how to use Google Search operators to render better results whether searching on the web or in G Suite. Explore the benefits of Google’s desktop productivity tools, mobile apps, backup and file synchronization options, and cloud-based solutions. Walk away with timesaving tips on how to use Google offerings more effectively and efficiently.

FOS: Computer Software & Applications – Non-Technical (2)

“See you next year!
I will be bringing a colleague next time!”

– 2018 attendee
12:05 – 12:55 p.m. | Lunch

12:55 – 2:35 p.m. | Breakout Sessions C

C1. Blockchain and Emerging Technologies
Val D. Steed, CPA.CITP, MA, K2 Enterprises
Blockchain and other emerging technologies affect every industry and profession. Learn how to leverage these technologies to increase your productivity and efficiency and discover which trends could impact your strategy. Find out how robotic process automation is changing the landscape of traditional accounting and financial functions. Plus, get recommendations on what to approve — or avoid — when considering your tech options.

FOS: Information Technology – Technical (2)

C2. Small Business Cloud Accounting Shootout
Thomas G. Stephens Jr., CPA.CITP, CGMA, K2 Enterprises
Cloud-based accounting solutions are taking the market by storm. With so many options available, it can be difficult to decide which one is best for you or your clients. Learn the five critical questions to ask yourself when considering a small business accounting solution. Explore the strengths — and potential issues — associated with QuickBooks Online, Sage Business Cloud Accounting, Xero and Accounting Suite, as well as some lesser-known but practical options such as Zoho and Wave Accounting. Receive useful guidance to help you match the right solution to your company’s needs.

FOS: Information Technology – Technical (2)

2:35 – 2:50 p.m. | Refreshment Break

2:50 – 4:30 p.m. | Breakout Sessions D

D1. Going Virtual: Technologies to Support Remote Team Members
Thomas G. Stephens Jr., CPA.CITP, CGMA, K2 Enterprises
“Going virtual” has evolved beyond any place, time or device. How do you provide an effective work environment for all employees regardless of location? In this session, explore a wide variety of tools that will help you create an effective remote work environment. Take a closer look at multi-factor authentication, hosting, VOIP telephony, video conference, document management systems, portals and more. Walk away with a better understanding of the key applications to increase productivity and improve security as well as the technologies best suited for remote work.

FOS: Information Technology – Technical (2)

D2. Personal Privacy
Val D. Steed, CPA.CITP, MA, K2 Enterprises
With much of your personal information collected and stored by others, it’s important to know what you can do to protect your privacy. In this thought-provoking session, learn valuable techniques to help you identify which elements of your personal information are at risk and find out how to keep them safe. Discover what companies such as Amazon and Google know about you, the importance of cleansing your public profiles and steps to take if you believe your data has been compromised. Plus, see how an action plan can help you take charge of your personal information.

FOS: Information Technology – Technical (2)
4:40 – 5:30 p.m. | Bonus Session

Earn an extra hour of CPE! Pre-registration is required.

**Microsoft Teams: Bring Your Team Together**

*Thomas G. Stephens Jr., CPA.CITP, CGMA, K2 Enterprises*

It’s tough to keep everyone on the same page and pointed in the same direction, especially when they aren’t in the same physical location. If this is true for you, Microsoft Teams is your solution. Learn how to use this new application to organize workflows, communications and document sharing for your workgroup, department or organization. Discover how having all your team’s information in one place and fully integrated with your Microsoft Office applications can help improve team collaboration and performance.

**FOS:** Computer Software & Applications – Non-Technical (1)

― 2018 attendee

**LAPTOP FRIENDLY**

This conference is a laptop-friendly, laptop-optional environment. Bring your computer if you’d like to work along with the examples or take notes. And don’t worry about your battery life — for your convenience, the MNCPA Education Center has power outlets built into all training room tables.

“The topics presented were relevant and the speakers were knowledgeable.”

― 2018 attendee
DAY TWO: WEDNESDAY, MAY 22

8 – 8:30 a.m. | Check-in, Continental Breakfast

8:30 – 10:10 a.m. | General Session

E1. The Best of the Best: Office Productivity Boosters
Steven M. Phelan, CPA.CITP, K2 Enterprises

Productivity is the name of the game in today’s fast-paced environment. Discover how to use Microsoft Office features and functionality in tandem with helpful add-in software and hardware to save time and improve collaboration. Receive helpful tips and tricks such as opening a calendar in a new window, color coding calendars and using Outlook Mobile. Look beyond Office for other productivity enhancers such as Sanebox, Mimecast and AppRiver. See how having the right hardware — even something as simple as a better-quality mouse — can provide you with a much-needed boost.

FOS: Computer Software & Applications – Non-Technical (2)

10:10 – 10:25 a.m. | Refreshment Break

10:25 a.m. – 12:05 p.m. | Breakout Sessions F

F1. Excel Power Query: 10 Things You Need to Know
Thomas G. Stephens Jr., CPA.CITP, CGMA, K2 Enterprises

Microsoft Power Query is better than ever, giving you the ability to access, link and prepare data for reporting. This eye-opening session unveils the 10 things every Power Query user should know to create powerful reports from any data source in less time. Learn which Excel versions include Power Query. Discover how to import data from various sources including text, Excel, websites and other databases. Find out how to create Power Queries to pivot and unpivot data, split and combine data columns, and group data by fiscal quarters and years.

FOS: Computer Software & Applications – Non-Technical (2)

F2. A Scary Ride Through the Dark Web
Steven M. Phelan, CPA.CITP, K2 Enterprises

The Dark Web is a very real and frightening place. Buckle up for a scary ride through the underbelly of the internet, where many illicit and illegal activities occur daily and can potentially affect your personal and organizational security. Get a firsthand look at the Dark Web and all it entails, both positive and negative. See how it differs from the “ordinary” internet and Deep Web. Learn the importance of securing your information so you don’t fall victim to data hacks and identity theft.

FOS: Information Technology – Technical (2)

SAVE $100
REGISTER BY MAY 3

“I walked away with a few action points, so I definitely got my money’s worth”
— 2018 attendee
12:05 – 12:50 p.m. | Lunch

12:50 – 1:40 p.m. | Breakout Sessions G

G1. Improving Communications With Effective Visualizations
Steven M. Phelan, CPA.CITP, K2 Enterprises

Do you want to improve your visual communication skills? Are you ready to take your charts and graphs to the next level? If you answered yes, this is the session for you. Enhance the way you communicate data as you learn how to create advanced charts that are interactive, dynamic and animated. Explore visualizations through a variety of applications, discover best practices and examine common mistakes to avoid.

FOS: Computer Software & Applications – Non-Technical (1)

G2. Power BI: Advanced Reporting
Thomas G. Stephens Jr., CPA.CITP, CGMA, K2 Enterprises

There’s more to Power BI than importing data and creating simple reports. Harness Power BI’s full potential when you know how to take advantage of its most notable features. Discover how to manage data relationships, create KPIs, add goal-orientated graphics, filter with Slicers, use the new AI features, and more. Plus, learn how to use Power BI Desktop, BI Mobile and Power BI Pro to develop a comprehensive reporting strategy.

FOS: Computer Software & Applications – Non-Technical (1)

1:45 – 2:35 p.m. | Breakout Sessions H

H1. Sales Tax Compliance in a Post-Wayfair World
Thomas G. Stephens Jr., CPA.CITP, CGMA, K2 Enterprises

Thanks to the Supreme Court’s Wayfair decision last year, sales tax compliance has become infinitely more complex. Many states have already implemented, or are in the process of implementing, new laws requiring businesses to charge, collect and remit sales taxes on transactions that cross state lines. Make sure you’re taking steps to comply and avoid costly fines and penalties. In this timely session, review the Wayfair decision and its impact on businesses, learn about helpful accounting applications and third-party tools to ensure compliance with state requirements, and see how you can streamline your compliance processes.

FOS: Taxes – Technical (1)

H2. Current Tech Crimes: Ripped From the Headlines
Steven M. Phelan, CPA.CITP, K2 Enterprises

What continues to make the list of top 10 business concerns? Security. And yet, many organizations fail to implement effective internal controls for their technology, leaving the door wide open for hackers. Learn how to close the door on these criminals by establishing critical IT-related controls. Walk through real-world examples of breaches and security failures to better understand how to protect your company and its data.

FOS: Information Technology – Technical (1)
2:35 – 2:50 p.m. | Refreshment Break
2:50 – 4:30 p.m. | General Session

I1. Excel’s Best New Features
Thomas G. Stephens Jr., CPA, CITP, CGMA, K2 Enterprises

With its latest release and recent updates, Excel just keeps getting bigger and better. Come check out some of the new functions such as IFS, SWITCH, and FORECAST.ETS and see how they can improve your productivity. Learn how you can create data models, collaborate in real time with other users, use Power Query to link data from external sources, and much more.

FOS: Computer Software & Applications – Non-Technical (2)

MEET THE SPEAKERS

Steven M. Phelan, CPA, CITP, a discussion leader with K2 Enterprises, teaches nationwide on a variety of computer software and technology related topics. He also manages an accounting firm based in Oklahoma City, Oklahoma. His areas of practice include taxation, accounting, business advisory and technology consulting services. In addition, Phelan has served on the board of directors and technology committee for the Oklahoma Society of CPAs (OSCPA) and has been a frequent contributor to CPA Practice Advisor.

Val D. Steed, CPA, CITP, MA, CEO of K2 Enterprises, has 12 years of public practice and 34 years of accounting technology experience. Steed has served on several AICPA committees as well as the CPE committee for the Utah Association of CPAs. He has been named one of the “Top 100 Influential Accounting Professionals” by Accounting Today and has received numerous outstanding discussion leader awards from the AICPA and various state CPA societies.

Thomas G. “Tommy” Stephens Jr., CPA, CITP, CGMA, a partner with K2 Enterprises, lectures nationally on subjects such as internal controls for small businesses, technology strategies, computer hardware and software applications, tax strategies and compliance, and financial accounting standards and applications. Stephens began his career with BellSouth Corporation as an internal auditor, and eventually started his own public accounting practice prior to joining K2.

TALK TECH ON CONNECT
www.mncpa.org/connect

Keep technology trends top-of-mind long after this two-day conference by joining the MNCPA’s Connect Infotech discussion community. Post questions, offer answers or share resources within this members-only online platform.

The Minnesota Society of CPAs (MNCPA) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org.
MORE TECHNOLOGY CPE FROM K2 ENTERPRISES

Your software programs are continually enhanced and improved. But what about your skills with using them?

At these programs, strengthen your productivity and learn timesaving tricks as you learn from top-rated speaker and technology expert Tommy Stephens. Visit www.mncpa.org/cpe for course details, registration and more CPE options.

K2’s Excel Tips, Tricks and Techniques for Accountants (EXCEL)
June 19 | MNCPA, Bloomington | 8:30 a.m. - 4:30 p.m. | 8 CPE
Explore helpful techniques related to data formatting, customization hacks, formulas, functions, linking data, reporting and much more in this in-depth course. Regardless of your experience level, you’ll walk away with many tips to improve your Excel productivity, make your workday more efficient and spend less time on mundane tasks.

NEW! K2’s Microsoft Office 365: All the Things You Need to Know (MSO)
June 20 | MNCPA, Bloomington | 8:30 a.m. - 4:30 p.m. | 8 CPE
Microsoft Office 365 continues to evolve into a powerful suite of tools — tools you probably aren’t making full use of. Discover what’s available in Office 365 to improve productivity, collaboration and communication for your team and your organization. Get guidance on useful tools and apps so you can work more efficiently and effectively.

K2’s Excel Best Practices (EBP)
June 24 | MNCPA, Bloomington | 8:30 a.m. - 4:30 p.m. | 8 CPE
As spreadsheets evolve, so must your methods for working with them. Learn the productivity best practices the experts know and start using Excel to its full potential. Get tips related to creating and editing spreadsheets, security, collaboration and data reporting. Return to your office with insights you can immediately use to minimize data errors and work more productively in Excel.

K2’s Advanced Excel (AEXCEL)
Oct. 17 | MNCPA, Bloomington | 8:30 a.m. - 4:30 p.m. | 8 CPE
Go to the next level and uncover advanced Excel tips and real-world examples developed by accountants, for accountants. Boost your prowess with tables, data models, complex formulas, data analysis, reporting and much more. Come away with tips you can immediately apply to improve productivity and save yourself time.

K2’s QuickBooks for Accountants (QBA)
Oct. 18 | MNCPA, Bloomington | 8:30 a.m. - 4:30 p.m. | 8 CPE
Find out how to get more out of QuickBooks and resolve the issues that plague even experienced users, including locking down prior periods and recording transactions properly. Take a look at the top problems accountants face and receive practical solutions to streamline how you work with QuickBooks.
**GENERAL INFORMATION**

**DATES AND TIMES**

Tuesday, May 21  
Check-in: 8 – 8:30 a.m.  
Sessions: 8:30 a.m. – 4:30 p.m.  
Bonus session: 4:40 – 5:30 p.m.  

Wednesday, May 22  
Check-in: 8 – 8:30 a.m.  
Sessions: 8:30 a.m. – 4:30 p.m.  

**LOCATION**

MNCPA Education Center  
1650 W. 82nd St., Suite 600  
Bloomington, MN 55431  
952-831-2707 / 1-800-331-4288  
Visit [www.mncpa.org/cpe/xmcc](http://www.mncpa.org/cpe/xmcc) for map and driving directions.

**HOTEL**

Staybridge Suites Bloomington  
5150 American Blvd. W.  
Bloomington, MN 55437  
952-831-7900  
To get the special $129 nightly rate, call and request the MNCPA rate.

**MEALS AND REFRESHMENTS**

Continental breakfast, refreshments and lunch are provided both days. Please notify the MNCPA of any dietary restrictions when you submit your registration. You can also change your preferences by contacting MNCPA customer service at 952-831-2707 or CustomerService@mncpa.org.

**SPECIAL REQUESTS**

Please notify the MNCPA of any special needs or ADA requests. Every effort will be made to accommodate you.

**WHAT TO WEAR**

Most conference attendees wear comfortable business or business casual clothing. Room temperatures can vary; dressing in layers is strongly recommended.

**FEES**

**Early Bird**  
Submit registration with payment by Friday, May 3.  
Nonmember $599  
Member $499

**Standard**  
Nonmember $699  
Member $599

**CREDITS**

CPE: 16 hours (conference)  
1 hour (bonus session)  
See session descriptions for technical / non-technical fields of study.

**CERTIFICATE OF ATTENDANCE** (CPE TRANSCRIPT)

Your certificate of attendance (aka CPE transcript) will be available beginning Friday, May 24. You can access your CPE transcript via the MNCPA website or request a copy be sent to you by contacting MNCPA customer service at 952-831-2707 or CustomerService@mncpa.org.  
Visit [www.mncpa.org/transcript](http://www.mncpa.org/transcript) to view or print your CPE transcript.

**CANCELLATION AND REFUND POLICY**

Receive a full refund if you cancel your registration by 4 p.m. on Wednesday, May 15.

**CONTACT INFORMATION**

Please contact MNCPA customer service with any questions or concerns regarding the MNCPA Technology Conference.  
Phone: 952-831-2707  
1-800-331-4288 toll free  
Email: CustomerService@mncpa.org

**EVENT CODE**

XMCC

**Photo Disclaimer:** Photographs may be taken at MNCPA events and used in society marketing. Full policy is available at [www.mncpa.org/PhotoUse](http://www.mncpa.org/PhotoUse).
YES! Sign me up for the MNCPA Technology Conference.

ONLINE: www.mncpa.org/cpe/xmcc  
MAIL: Minnesota Society of CPAs  
1650 W. 82nd St., Suite 600  
Bloomington, MN 55431

FAX: 1-888-487-9931  
PHONE: 952-831-2707  
1-800-331-4288 toll free

---

**NAME**

<table>
<thead>
<tr>
<th>COMPANY</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADDRESS</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CITY</th>
<th>STATE</th>
<th>ZIP</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>PHONE</th>
<th>EMAIL</th>
</tr>
</thead>
</table>

---

### DIETARY RESTRICTIONS

- Vegetarian  
- Vegan  
- Gluten free  
- Food allergy ____________________

---

### BREAKOUT SESSION CHOICES

Please indicate the breakout sessions you plan to attend at the conference. You must submit this information to receive continuing education credits.

#### Day One: Tuesday, May 21

- B1. Bringing Artificial Intelligence to Your Excel Workbooks  
- B2. Everything Google: How to Utilize Tools, Services and More  
- C1. Blockchain and Emerging Technologies  
- C2. Small Business Cloud Accounting Shootout  
- D1. Going Virtual: Technologies to Support Remote Team Members  
- D2. Personal Privacy

---

#### Day Two: Wednesday, May 22

- F1. Excel Power Query: 10 Things You Need to Know  
- F2. A Scary Ride Through the Dark Web  
- G1. Improving Communications With Effective Visualizations  
- G2. Power BI: Advanced Reporting  
- H1. Sales Tax Compliance in a Post-Wayfair World  
- H2. Current Tech Crimes

---

### Optional Event

*Free for conference attendees.*  
**Bonus Session:** Microsoft Teams: Bringing Your Team Together  
Tuesday, May 21 | 4:40 – 5:30 p.m. | Earn one additional CPE credit.

---

### CONFERENCE FEES

#### Early Bird

*Submit registration with payment by Friday, May 3.*

- Nonmember  
  - $599  
- Member  
  - $499

---

#### Standard

*Submit registration with payment after Friday, May 3.*

- Nonmember  
  - $699  
- Member  
  - $599

---

### PAYMENT INFORMATION

**Type:**  
- Personal  
- Company

**Method:**  
- Check (payable to Minnesota Society of CPAs)  
- VISA  
- Mastercard  
- Discover  
- Bill me  
- American Express

Account # __________________________________________  Exp. date ______________

Signature ___________________________________________ Date  __________________

---

---

---

---
KNOW YOUR OPTIONS
HARNESS TECHNOLOGY FOR OPTIMAL RESULTS

REGISTER BY MAY 3 AND SAVE $100
www.mncpa.org/cpe/xmcc