

**GGI BEST PRACTICES &
DEVELOPING LEADERS CONFERENCE
22-24 SEPTEMBER 2016
ST LOUIS, MO, USA**



Hosted by

SANDBERG PHOENIX
& VON GONTARD P.C.

The Westin St Louis
811 Spruce Street
St Louis, MO 63102, USA
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Dress Code: Business Casual unless otherwise stated.

We kindly thank our sponsors:



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DELEGATE PROGRAMME

Thursday, 22 September 2016

13:45	Practice Group Participants depart for Sandberg Phoenix's Offices <i>Meeting Point: Hotel Lobby</i>
14:00 – 18:00	Practice Group Meetings in Sandberg Phoenix's Offices <i>600 Washington Avenue, 15th Floor, St Louis, MO 63101-1313</i>
	Auditing, Reporting & Compliance Jeffrey A. Ford
	International Taxation (ITPG) Douglas A. Dickey
18:30 – 19:30	GGI Hospitality Desk Open <i>Promenade Foyer</i>
19:00 – 22:30	Welcome Cocktail Reception <i>Promenade Foyer</i>
	Welcome Dinner <i>Promenade Ballroom AB</i>
	Presidential Welcome Claudio G. Cocca

Friday, 23 September 2016

08:30 – 17:30	GGI Hospitality Desk Open <i>Promenade Foyer</i>
09:00 – 17:30	Conference <i>Promenade Ballroom</i>
09:00 – 09:15	Best Practices & Developing Leaders
	Official Conference Opening Adam Crowson
	Welcome from Host Firm, Sandberg Phoenix Bhavik Patel
09:15 – 10:30	Best Practices & Developing Leaders
	"Emotional Intelligence" Daniel L. Stover
	<i>This session will cover the crucial role of self-awareness in developing successful relationships, and help you pinpoint behaviors that impact work performance and conflict. We will discuss how you can improve your leadership by understanding how the brain works, and how staying cool and building confidence can boost productivity. We will also look at how to recognize and manage ineffective office behaviors. This insightful workshop is key to understanding emotions and how to manage them.</i>

10:30 – 11:00	Coffee Break <i>Promenade Foyer</i>
11:00 – 12:30	Best Practices & Developing Leaders “Succession Planning, Execution & Review Michael S. Malloy & Joseph D. Taylor – Case Study”
12:30 – 14:00	Lunch <i>Promenade Ballroom C</i>
14:00 – 15:30	Best Practices “Fostering Firm Culture and Employee Engagement” James A. Dressman, Jeffery L. Mowery & Anthony J. Soukenik
14:00 – 15:30	Developing Leaders “Managing Effective Meetings” Daniel L. Stover <i>In this session, you will learn how to navigate the difficulty of group dynamics in the board or executive conference room. Understanding what it means to be a good facilitator is to understand not only how to execute and reign-in discussion, but also how to provide a safe environment for ideas and comments to be shared. This session explores the emotional implications of the attendees of your own meetings, and how to create a new dynamic that is both efficient and effective.</i>
15:30 – 16:00	Coffee Break
16:00 – 17:30	Best Practices
16:00 – 16:10	Benchmarking Theodore A. Offit
16:10 – 16:50	“Profit Optimization” Douglas A. Dickey
16:50 – 17:30	“Delivering a Client Service Focused Culture” Rodney C. Lee & John W. Shenk
16:00 – 17:30	Developing Leaders Team Building Escape the Room <i>Dress Code: Casual</i> <i>While it looks like any other ordinary room, it’s actually a real life adventure game designed for intense cooperation and working together. Find the hidden objects, figure out the clues and solve the puzzles to earn your freedom and “Escape the Room.” You have 60 minutes, so be quick!</i>
19:00 – 23:00	Hosted Dinner by Sandberg Phoenix <i>at the home of Peter von Gontard, 2845 S. Lindberg Blvd, St Louis, MO 63131</i> <i>Dress Code: Casual</i> <i>Meeting Point: Hotel Lobby for transfer</i>

Saturday, 24 September 2016

Check out no later than 12:00 noon.

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| 08:30 – 12:30 | GGI Hospitality Desk Open
<i>Promenade Foyer</i> |
| 09:00 – 12:30 | Conference
<i>Promenade Ballroom</i> |
| 09:00 – 10:00 | <p>Best Practices & Developing Leaders
 “Generational Changes in Business Development” (Part 1) Wendy Merrill</p> <p><i>Wendy Merrill, Chief Rainmaker and Founder of StrategyHorse Consulting Group, will lead a discussion focusing on a modern approach to business development. Law firms and Accounting firms are facing the unique challenge of being traditional business models forced into non-traditional times. In order to secure their future, firms must recognize how both the “game” and the “players” have changed in terms of business development. Wendy will share best practices on how to employ innovative and pragmatic strategies that allow firms to thrive. The aim is to raise awareness about the critical role of coordinating internal marketing efforts with external business development activities to facilitate smart growth.</i></p> |
| 10:00 – 10:30 | Coffee Break
<i>Promenade Foyer</i> |
| 10:30 – 12:30 | <p>Best Practices & Developing Leaders
 “Generational Changes in Business Development” (Part 2) Moderators: Wendy Merrill & Bhavik Patel</p> <p><i>End of Conference</i></p> |
| After 13:00 | <p>OPTIONAL Game of Golf at Nordwood Hills Country Club</p> <p><i>Anthony J. Soukenik at Sandberg Phoenix would be happy to organize a game of golf for those who are interested. The course is 8 minutes from the airport. (USD 150 includes green fees, cart, drinks and food. Additional USD 50 for rental clubs.)</i></p> |

SPEAKERS

Daniel L. Stover



Daniel L. Stover manages the west coast office for Integrated Leadership Systems from Los Angeles, California. He received his education from The Ohio State University where he studied Psychology, Criminology and Security & Intelligence. The core of his development and training was in cognitive-behavior psychology and mental health crisis intervention. Through this experience, he learned that his passion and purpose is to help others understand their emotions.

The scope of Dan's work in succession planning, team consulting, coaching, training and development provides insight into the core issues that keep an individual or team from performing at their highest level. Although the work is designed to address emotional intelligence, it is aimed to positively impact the bottom line.

Dan is a community advocate and has served on multiple non-profit boards in the areas of mental health and community development in both Columbus, OH, and as a volunteer in Los Angeles, CA. In his free time, Dan's activities are hiking, painting, sport-shooting, reading, writing and continuing his formal education.

Wendy Merrill

Wendy is the Chief Rainmaker at StrategyHorse Consulting Group. She is a vocal advocate for creative problem-solving and has advised accounting firms, law firms, consulting practices, publicly traded banks, political campaigns, real estate professionals and significant players in the technology space. StrategyHorse's clients benefit from her intuitiveness and her experience as a trusted business advisor and intrepid CEO. Her practice incorporates common sense and humor in order to inspire smart and sustainable growth.



PRACTICE GROUP SUMMARIES

Thursday, 22 September 2016, 14:00 – 18:00

Auditing, Reporting & Compliance

Jeffrey A. Ford

The beginning of this session will provide a brief GAAP update and an overview of requirements of Group Audits, from the perspectives of both Group and Component auditors. An open discussion will follow focusing on how we can best work together to grow the North American Auditing, Reporting & Compliance Practice Group. Topics will include: US collaboration, cross-border collaboration, help desk forum, etc.

International Taxation (ITPG)

Douglas A. Dickey

Douglas A. Dickey, North American Regional Chairperson of the Practice Group, will begin the meeting with “GGI News and Update”. We will then have a presentation on “New Basis Rules for Inherited Property” by Robert V. A. Harra, III and Daniel Hayward (both from GGI member firm, Gordon Fournaris & Mammarella, P.A.). Following on from this, Robert Worthington (from GGI member firm, Shea Nerland LLP) will talk about “Tax Research & Disclosure - How much is enough.....or too much”. After a short break, Jeff Mowery (from GGI member firm, Mowery & Schoenfeld LLC) will present “Merger & Acquisitions - What to look for - Best Practices”.

Finally, Thomas Fritz (from sponsoring firm Vontobel Swiss Wealth Advisors AG), Kevin Walsh (from GGI member firm, Walsh King Chartered Accountants) and Douglas A. Dickey (from GGI member firm DRDA PLLC) will discuss “The North American Investor Abroad”.

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