McKONLY & ASBURY LLP
CERTIFIED PUBLIC ACCOUNTANTS

Collaborate 2014 Conference
Wednesday, May 21 - Hershey Lodge

8:00AM - 8:50AM — **Registration and Breakfast**

8:50AM - 9:00AM — **Welcome - McKonly & Asbury**

9:00AM - 9:50AM — **Business Banking - The Road Ahead: Optimism, Outlook, and Trends - *Quincy Miller, Executive Vice President and Head of Business Banking for RBS Citizens Financial Group, Inc.***

This session will provide statistical detail, trends, and analysis regarding the economic pulse and the business banking landscape. Hear what's happening with regulatory changes impacting business clients and how banks are responding to the competitive environment by stepping up their game in meeting the needs of business owners.

9:50AM - 10:00AM — **Break**

10:00AM - 11:40AM — **Tax Reform and Business: The Real Outlook from The Hill - *Dean Zerbe and Mark Everson, alliantgroup***

Hear directly from alliantgroup's experts, Dean Zerbe, former Senior Tax Counsel to the U.S. Senate Finance Committee, and Mark Everson, former IRS Commissioner, about what's really going on with critical legislation and developments from The Hill and the IRS. These insiders share the outlook for short- and long-term changes in tax policy and regulations, budget issues, and other legislation impacting businesses.

11:40AM - 12:30PM — **Lunch**

12:30PM - 1:20PM — **Your Employment Law Check-Up: Top 10 Tools to Manage Risk of Employment Litigation in 2014 - *Jill Sebest Welch, Barley Snyder***

The U.S. Equal Employment Opportunity Commission secured $372.1 million in relief from the private sector during the 2013 fiscal year, a record in monetary benefits collected through enforcement actions. Federal wage-and-hour lawsuit filings continued to rise in 2013. In 2014, employers will have to reinvent their strategies to deal with new decisions and rules by the National Labor Relations Board that make union organizing easier for employees. To face the new year and these litigation trends, resolve to update your company's policies and procedures. This session will tell you how.

1:30PM - 2:20PM — **Breakout Session A - Options are as follows:**

Option A-1: Blending Creativity Into Your Culture - *Michael Biggerstaff, Nxtbook Media*

Creativity comes in all shapes and sizes, but all too often companies shy away from incorporating any of it into their corporate culture. Whether from fear or lack of know-how, businesses are missing an incredible opportunity to generate excitement and intrigue in their employees, clients, and community. Stand out from the rest: join this session as Michael demonstrates the benefits of blending creativity with an overall corporate culture. Learn how infusing a life-giving dose of creativity into your corporate communications, everyday actions, and workplace environment can transform how you define business.

Option A-2: Emerging Issues in Financial Reporting - *Michael Hoffner and Janice Snyder, McKonly & Asbury*

An informative session on recently released financial accounting and reporting rules, how they will impact the users of an organization's financial statements, and a practical discussion of implementation considerations. We will also focus on recent developments that will specifically impact privately held companies in a positive manner, including an up-to-date review of the activities of the Private Company Council and its efforts to streamline financial reporting for private companies.

Register today at www.macpas.com/collaborate2014
Contact us at events@macpas.com or 717-972-5822

2:30PM - 3:20PM

Breakout Session B - Options are as follows:

Option B-1: Retirement Readiness - *Thomas Reese, Conrad Siegel*

This session will focus on how "Retirement Readiness" impacts employers and employees. Survey data will be shared about employer and employee concerns. There will be discussion on how employers and employees can analyze retirement readiness. The session will offer the key steps that employers can take to drive success for their employees' retirement and will also discuss new key issues facing employees who are near retirement age.

Option B-2: A Comprehensive Look at the Wealth Transfer, Protection, and Enhancement Benefits of a South Dakota Trust - *Daniel Matarrese, McKonly & Asbury and David Warren, Bridgeford Trust Company*

This session will walk through a case study which details the effective use of trusts in overall family wealth management. Dan and Dave will discuss how they approach the specific asset protection, tax, and transfer objectives of the family depicted in this case study. They will outline the common hurdles that families face in trust planning and how new developments in the trust world have allowed for even more effective planning strategies.

3:30PM - 4:20PM

Managing PPACA Changes in 2014 - *Aji Abraham, Capital BlueCross*

Since the inception of the Patient Protection and Affordable Care Act (PPACA) on March 10, 2012, one thing has remained consistent; and that is change. The ACA is the largest wholesale change in the health care industry in recent times. This change has impacted health insurers, employers, physicians, and individuals. During this session, Aji will discuss PPACA implications to individuals and employer groups focusing on those provisions of the law that are scheduled to go into effect this year.

4:20PM - 4:30PM

Closing

4:30PM - 6:00PM

Reception

Join us after the day's sessions for a reception featuring networking, food and drinks, and a drawing with the opportunity to win an iPad mini!

Every attendee will receive an entry for attending. You can earn additional entries by encouraging your coworkers and contacts to attend! On our registration form, there is a section entitled "How did you hear about this event?" If your name is entered because you referred someone to attend, you will earn an additional entry. There is no limit to how many people you can refer. You must be present at the time of the drawing to win.