

NA Regional Conference

1st Annual Conference for Abacus
North America Members



ABACUS
WORLDWIDE

1-2 May 2018
The Ritz-Carlton Atlanta
Atlanta, Georgia
USA

From the CEO

We invite you to join us in Atlanta this May 2018 as we celebrate our inaugural annual North America Regional Conference. Abacus is growing globally but regional development is a primary focus of our strategic development. It is important to bring firms together internationally, but equally so to connect in smaller more localized groups where firms may share knowledge, business and similar jurisdictional challenges. Last year we launched our first regional conference for the EMEA region and from that success, we aim to do the same for each region in the coming years. North America is the next region to take that strategic step. We hope to see each of our NA regional member firms represented in Atlanta “The Big Peach”. Our educational program is focused on NA regional topics and aims to provide opportunity for knowledge exchange, benchmarking and sharing of best practices. We have chosen The Ritz-Carlton Atlanta as the venue, with an excellent downtown location. Please also remember that each NA regional member’s 2018 dues include one pre-paid delegate registration for this conference regardless of participation, so please register to attend and have your firm represented in Atlanta. As usual, I would like to personally thank our Advisory Board members for supporting and assisting in the development of the program, as well as our Atlanta member and each of the guest speakers and presenters contributing to the educational agenda. I look forward to seeing you all in Atlanta!



Sincerely,

Julio Gabay
President & CEO
Abacus Worldwide

Social Program Highlights



Tuesday evening, we kick off the NA Conference in Atlanta. Delegates, Spouses and Guests will enjoy a welcome drink at the hotel and dinner at Ray’s in the City.



On Wednesday morning, for accompanying Spouses and Guests only, we will organize a guided tour of the Coca-Cola Museum followed by lunch and free time for shopping in the city.

Educational Agenda

Tuesday May 1 st	
6:30PM–7:15PM	Welcome Drink – Kick-off the conference with ample time to network with other members and enjoy the evening together. Delegates and accompanying Spouses/Guests will have a welcome drink in the hotel.
7:15PM–9:30PM	Networking Dinner – Delegates/Spouses/Guests will enjoy a networking dinner at Ray’s in the City.
Attire:	Smart Casual
Wednesday May 2 nd	
7:30AM–8:45AM	Breakfast – Continental outside the meeting room
9:00AM–9:30AM	Welcome & Abacus Worldwide Regional Update – this presentation will give members a look at our regional focus/development for North America – Presented by Julio Gabay, President & CEO of Abacus
9:30AM–10:15AM	Firm Introductions – New Members Only
10:15AM–10:45AM	Networking Coffee Break
10:45AM–12:15PM	Business Development – Firm Growth – Presentation by Key Note Speaker Katie Tolin
12:15PM–1:45PM	Lunch
1:45PM–3:00PM	Business Development – Firm Growth – Discussion Facilitated by Key Note Speaker Katie Tolin
3:00PM–3:15PM	Networking Coffee Break
3:15PM–4:15PM	Regional Hot Topic – Tax Reform Bill - Planning Strategies for Private Companies, M&A, Private Equity and International Clients – Panel moderated by Jason Schneider of Schneider Law Group PLLC
4:15PM–4:45PM	Regional Development Discussion – Moderated by Julio Gabay, President & CEO of Abacus Worldwide
4:45PM–5:00PM	Closing Remarks
Attire	Business Casual

CPE Information

Annual Regional Conference Speakers from industry, the profession, and academia will present new ideas and invaluable information on firm leadership. With sessions on Marketing, Technology and Firm Management, your organization will want to be represented as participants deal with the current issues in firm management.

<p>At this conference, participants will:</p> <ul style="list-style-type: none">• Communicate the regional developments and activities in place within Abacus Worldwide in North America.• Improve and maintain profitability through capitalizing on new opportunities regionally.• Develop priority setting and relationship building strategies critical to taking advantage of profit peaks;• Understand why required roles and resources are crucial to your firm's success.• Identify the international tools and resources available through the association. <p>REFUND AND CANCELLATION POLICY</p> <p>Each firm is required to prepay a registration fee for one delegate to attend the regional conference regardless of participation. Additional delegate registrations are optional. No refunds are made for the prepaid registration. Cancellation of additional delegate registration must be submitted in writing via email at info@abacusworldwide.org and must be received on or before April 25th, 2018 by 5:00PM Eastern to receive a full refund less a \$75 registration cancellation processing fee. Another registrant may be substituted for no additional fee. No telephone cancellations will be accepted. A 50% refund less a \$75 registration cancellation processing fee will be granted for cancellations submitted to Julio Gabay in writing via email from March 25th to April 25th, 2018. No refunds will be granted after April 25th. Refunds will be processed within 30 days after the conference.</p>	<p>REGISTRATION</p> <p>To register, please complete the attached registration form and return via email to info@abacusworldwide.org.</p> <p>\$750 for members (first delegate from North America pre-paid with dues) \$850 for non-members</p> <p>Conference participants can earn up to 5 hours in Marketing, Social Environment of Business, and Business Management & Organization</p> <p>Additional Information</p> <p>Prerequisite: Appropriate standing in the firm</p> <p>Who should attend: Managing Partners Partners Managers</p> <p>Advanced preparation: Presentations and Practice Management Survey will be sent to participants prior to conference</p> <p>Program Level: Advanced/update</p> <p>Delivery Method: Group-Live</p>
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Abacus Worldwide, LLC 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.learningmarket.org

DELEGATE REGISTRATION

(Please complete a separate registration form for each participant from your firm)

Delegate First Name _____

Delegate Last Name _____

Nickname for badge _____

Firm _____

Title _____

Address _____

City _____ State _____ Zip _____

Country _____

Email _____ Telephone _____

Please List Any Dietary Restrictions _____

PHOTO FOR CONFERENCE DIRECTORY: Please be sure to email a current photo of yourself, in digital format (JPG, GIF, TIFF), to Abacus Worldwide at info@abacusworldwide.org no later than **April 1, 2018**.

GUEST REGISTRATION

(Please complete a separate registration form for each accompanying guest participant)

Guest First Name _____

Guest Last Name _____

Nickname for badge _____

Dietary Restrictions: _____

PHOTO FOR CONFERENCE DIRECTORY: Please be sure to email a current photo of yourself, in digital format (JPG, GIF, TIFF), to Abacus Worldwide at info@abacusworldwide.org no later than **April 1, 2018**.

REGISTRATIONS MUST BE RECEIVED BY ABACUS WORLDWIDE BEFORE APRIL 1, 2018 AT 5:00PM EASTERN

Payment Form

Type	Fee	# of Attendees	Subtotal
1 st Delegate Registration (NA Abacus Members)	PRE-PAID (NA ONLY)	X <u>1</u>	= <u>00.00</u>
1 st Delegate Registration (Non-NA Abacus Members)	US \$750 (NON-NA)	X	= _____
2 nd Delegate Registration (All Abacus Members)	US \$700 (ALL REGIONS)	X	= _____
Delegate Registration (Non-Abacus Members)	US \$850	X	= _____
Accompanying Guests/Spouse	US \$300	X	= _____

TOTAL	= _____	= _____
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Delegate Registration Fee Includes: Opening Reception/Dinner; Conference Coffee Breaks; Conference Lunch; and all Conference Sessions & Materials.

Guest/Spouse Registration Fee Includes: Opening Reception/Dinner; Spouse Tour, and Lunch.

I will Send Payment via Check from a US Bank

Please Charge my Credit Card Below

Credit Card Type: Visa Master Card Discover Amex

Credit Card Number: _____

Credit card CID Number: _____ Expiration: _____

Billing Street Address Only: _____

Billing Postal Code Only: _____

Name on Credit Card: _____

PAYMENT OF REGISTRATION FEES MUST ACCOMPANY REGISTRATION FORMS

To register, please fill-in this registration and payment form, click on "file", "save as", then save to your computer, OR print to PDF, save and email saved form to Abacus via info@abacusworldwide.org by no later than **April 1, 2018** If paying via US check, mail payment to: P.O. Box 56-1166 Miami FL 33256-1166, USA by no later than **April 1, 2018**

Hotel Reservations

To **reserve your discounted room** at The Ritz-Carlton Atlanta, please click the following link: [Book your group rate for the Abacus Worldwide NA Conference](#) and enter the promo code: **ANAANAA**

The Abacus Worldwide Conference rate at the **Ritz-Carlton Atlanta** is **\$179.00** per night for **single** or **double** occupancy for check-in on May 1st and check-out on May 2nd. Room rates include free wi-fi. Room rates **DO NOT** include **taxes**. For booking an **upgrade to a suite**, or for **booking additional nights outside of the conference date** please make requests to [Abacus Worldwide](#) and you will be directed to the hotel contact for booking.

Room Type	Rate	How to Book Reservation
Ritz Guest Room Single or Double	\$179.00	Book your group rate for the Abacus Worldwide NA Conference Promo Code: ANAANAA
Suite Upgrades Upon Request	TBD	Email Abacus Worldwide with request to be sent to hotel booking

Room types are not guaranteed and are based upon availability only. Sleeping room rates are not commissionable and do not include taxes. Taxes are subject to change.

To receive the group rate, reservations must be made **before March 30, 2018**. Reservations requested by attendees after this date will be accepted based upon availability and may not receive the discounted rate. Quoted sleeping rates will be offered, based on space and rate availability, pre/post the conference dates of May 2nd. If you need to book additional nights pre or post event please contact [Abacus Worldwide](#) and you will be directed to the hotel contact for booking.

HOTEL DEPOSITS / CANCELLATION POLICY / CHECK-IN/OUT

A deposit equal to the total stay is required to hold each guest's reservation and will be charged at the time the reservation is made. **Deposits may be refunded only if the hotel receives notice of cancelation at least 72 hours prior to scheduled arrival.**

Check-in time is 3:00 PM and check-out time is 12:00 PM. All guests arriving before 3:00 PM will be accommodated as rooms become available.

Conference Registration Policy

FEES AND DEADLINES AT A GLANCE

Action	How	Cost	Send Payment To	Deadline Date
Register for Conference	Send below form to Abacus Worldwide	Delegate Fees: 1 st Delegate PREPAID \$750 per additional delegates \$850 per non-member \$300 per accompanying guest/spouse	Abacus Worldwide	April 1, 2018
Book Hotel	Contact the Ritz Carlton Atlanta	\$179.00 single or double per night Tax is not included	Ritz Carlton Atlanta	March 30, 2018, 5:00 PM Eastern
Book Travel	Book direct with preferred airline or travel agent	Variable, depending on departure location and travel dates	Airline/Transportation vendor of delegate's choice	As soon as possible to ensure best airfares

DEADLINE

To be considered “on time” and thereby guaranteed full access to all conference sessions and events, conference registrations must be received by Abacus Worldwide before 5:00 PM Eastern on **April 1, 2018**.

Please note that hotel reservations are first-come, first-served and are not guaranteed under this registration policy. Consult the “hotel reservations” section of this registration packet for information about hotel registration deadlines and how to register for your hotel room.

CURRENCY

Fees listed for conference registration payable to Abacus are in **USD\$**. Fees listed for hotel rates payable to the hotel are in **USD\$**.

CANCELLATION POLICY

DELEGATE: Each firm is required to prepay a registration fee for one delegate to attend the regional conference regardless of participation. Additional delegate registrations are optional. No refunds are made for the prepaid registration. Cancellation of additional delegate registrations must be submitted in writing to Julio Gabay via email at julio@abacusworldwide.org and must be received on or before April 25th, 2018 by 5:00PM Eastern to receive a full refund less a \$75 registration cancellation processing fee. Another registrant may be substituted for no additional fee. No telephone cancellations will be accepted. A 50% refund less a \$75 registration cancellation processing fee will be granted for cancellations submitted to Julio Gabay in writing via email from March 25th to April 25th, 2018. No refunds will be granted after April 25th due to guarantees that have already been placed by Abacus Worldwide. Refunds will be processed within 30 days after the conference.

GUEST: Guest registrations can be cancelled up to April 25th, 2018 for a partial refund of 50% less a \$75 registration cancellation fee. No refunds will be made after April 25th. All cancellations must be made in writing and submitted

to Julio Gabay via email at julio@abacusworldwide.org. No telephone cancellations will be accepted. Refunds will be processed within 30 days after the conference.

DELEGATE PHOTO CONFERENCE DIRECTORY

We are producing a photo conference directory for all those attending the 2018 NA Regional Conference. This directory will allow fellow members to easily identify each other at the conference and will be a helpful aid for future business contacts.

Please email a recent photo of yourself in electronic format (JPG, GIF, TIFF) to Abacus Worldwide at info@abacusworldwide.org. For inclusion in the directory, your photo and registration materials MUST be received no later than **April 1, 2018**.

GROUND TRANSPORTATION TO HOTEL

The Ritz-Carlton Atlanta is a 20-min drive or train ride from Hartsfield-Jackson Atlanta International Airport (ATL).

Distance from ATL to Hotel: 11 miles/17 km

MARTA/Train

MARTA Typical Minimum Charge from ATL Airport: \$2.50 (Follow signs in airport. Take train to Peachtree Center Transit Station the hotel is one block from the station)

Taxi

Taxi Typical Minimum Charge from ATL Airport: \$30.00

Hotel Address:

Ritz-Carlton Atlanta
181 Peachtree Street, N.E.
Atlanta, Georgia 30303

WEATHER

Average temperature in Atlanta during May is High 76° to Low 56° (F) – High 25° to Low 13° (C).

OTHER ACTIVITIES WHILE IN ATLANTA

For more information on attractions and activities in and around Atlanta please visit: <http://www.atlanta.net/>. In addition, if you require further assistance or guidance with regard to your visit to Atlanta, please contact Julio Gabay with Abacus Worldwide at julio@abacusworldwide.org or at +1-305-389-9466.



Abacus Worldwide, LLC

info@abacusworldwide.org +1-305-407-3088 or +1-855-800-6307

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www.abacusworldwide.org