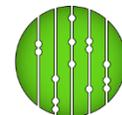


Navigating Through Change:

The 5th Annual World Conference for Abacus Members



October 19-21, 2017
Conrad London St James
London, England, UK



ABACUS
WORLDWIDE

2017 World Conference

From the CEO

This year we have our sights set on meeting in London, a truly wonderful and leading global city. Join us as we prepare to celebrate our fifth annual conference in this world cultural capital. Abacus continues to grow with new members internationally and the annual conference has become our catalyst for continued success. Every year, members from across the globe unite at our conferences to network, share knowledge and enjoy some time with old and new friends. We have worked hard to develop an educational program that can bring your firm value as we focus on this year's theme: "Navigating through Change". Our practice management round-tables continue to be one of our most highly rated sessions and as in past years, we will offer plenty of time for benchmarking and sharing of best practices. We have also expanded the firm introductions to allow firms to share a more formal presentation. We are truly looking forward to celebrating the annual conference and expect an excellent turnout to the event. We have chosen the Conrad London St James as the hotel venue, with an excellent location in the heart of London and with easy access to the city and its many offerings. We encourage each of our members to bring more than one partner to the conference as we are certain you and your firm will reap benefits from attending this year's conference. Please also remember that each member's 2017 dues include one pre-paid delegate registration for this conference regardless of participation, so please register to attend and have your firm represented in London. 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 sponsors, and each of the guest speakers contributing to the educational agenda. I look forward to seeing you all in London!



Sincerely,

A handwritten signature in black ink, appearing to read 'Julio Gabay'.

Julio Gabay
President & CEO
Abacus Worldwide



Social Program Highlights



Join us **Thursday evening** as we kick off the **5th Annual World Conference in London**. Delegates and accompanying Spouses and Guests will enjoy a **welcome cocktail reception at the Conrad London St James**. This year we are asking members to invite clients and colleagues located in London to join in on the Networking. We will meet at the Lobby Bar where we will enjoy a privately hosted reception including Hors D'oeuvres and Cocktails while networking with colleagues and friends. At the conclusion of the reception, delegates and guests are free to enjoy the remainder of their evening at one of the many venues in London. While dinner will be at your leisure, we would like to recommend a few restaurants within a short taxi from the hotel:



SEXY FISH

セクシーフィッシュ

Sexy Fish is an Asian restaurant and bar located on the corner of Berkeley Square, Mayfair serving Japanese-inspired sushi, sashimi, seafood, fish and meat cooked on a Robata grill. Designed by Martin Brudnizki Design Studio and decorated

with art by Damien Hirst, Frank Gehry and Michael Roberts, the look and feel is mid-century glamour and opulence. The restaurant and bar are open seven days a week, with a resident DJ from Wednesday through Saturday. A private dining space, The Coral Reef Room, is located on the lower ground floor and houses two of the largest live coral reef tanks in the world. The bar, which is open until late, holds one of the world's biggest Japanese whisky collections, as well as offering a drinks menu featuring both classic and inventive cocktails. Located at: Berkeley Square House, Berkeley Square W1J 6BR, UK – a short taxi ride or 20 minute walk from hotel Tel: +44 20 3764 2000



The WOLSELEY

The Wolseley is a café-restaurant in the grand European tradition located in St James' on London's most famous of boulevards, Piccadilly. Media types descend here for Modern European food, afternoon tea and grand art deco

glamour. For lunch and dinner service The Wolseley offers the choice of à la carte or all-day menus, both inspired by the grand cafés of Europe. Their menus offer an eclectic variety of dishes from seafood platters, to salads, to classics such as steak tartare and daily changing grilled fish of the day. Firm favourites veal Holstein and chicken soup with dumplings are always on the menu, as are the changing plats du jour. To follow, a wide selection of desserts and ice cream coupes. Located at: 160 Piccadilly, St. James's, London W1J 9EB, UK – a short taxi ride or 20 minute walk from hotel Tel: +44 20 7499 6996

GOODMAN

Goodman is a uniquely British interpretation of a New York grill, offering the best beef from both sides of the Atlantic. Most of the

meat we serve in our Mayfair restaurant is from Nebraskan USDA corn-fed herds, but we also source many rare breeds from the Lake District, including Belted Galloway, Shorthorn and Longhorn cattle. Our other steaks include grain-fed Australian and Wagyu from Japan and Chile. Every steak on our blackboard has been dry-aged on site – it's the best way to concentrate flavour – then we cook it over charcoal. Our Mayfair restaurant is located just off Regent Street. Located at: 24-26 Maddox St, Mayfair, London W1S 1QH, UK – a short taxi ride or 20 minute walk from hotel Tel: +44 20 7499 3776

NOVIKOV RESTAURANT & BAR

Novikov Restaurant & Bar combines cool and contemporary interiors with a superlative culinary offering. Located in the heart of Mayfair, Novikov Restaurant & Bar has 2 distinct

restaurants and one stylish Lounge Bar. A real feature of the Novikov Asian Restaurant is its open kitchen. Fronted by an amazing display of seafood and vegetables, it evokes the atmosphere of an Asian food market. The atmosphere here is at once welcoming and relaxing, but subtle enough not to distract from the food itself. The menu uses novel flavours and texture combinations, inspired by Chinese and Pan Asian cuisine. Located at: 50A Berkeley St, Mayfair, London W1J 8HA, UK – a short taxi ride or 20 minute walk from hotel Tel: +44 20 7399 4330

In addition, you may view the 10 most booked restaurants in London on the following link: [Open Table Top 10](#)



On **Friday morning**, for accompanying **Spouses and Guests only**, we will organize a visit to Buckingham Palace followed by lunch. On **Friday afternoon and evening**, **Delegates and accompanying Spouses and Guests**, are invited to a **sightseeing tour of London** followed by a

Networking Dinner at Gordon Ramsay's Heddon Street Kitchen. Located just off Regent's Street, in the heart of the West End, Heddon Street Kitchen is a stylish space set over two floors. Enjoy al fresco dining on the heated terrace and people-watching with a cocktail in the lounge bar as you absorb the theatre of the open-kitchen.



Agenda

Thursday October 19 th	
6:00PM–8:00PM	Welcome Cocktail Reception – Kick-off the conference with ample time to network with not only other members, but also with your local clients and colleagues. Delegates and accompanying Spouses and Guests will meet at the Lobby Bar for a private Welcome Reception including light Hors D'oeuvres. (Dinner at your leisure)
Attire:	Smart Casual
Friday October 20 th	
7:30AM–8:45AM	Breakfast is included with your hotel stay
9:00AM–9:45AM	Welcome & Abacus Worldwide Annual Update – this presentation will give members a look at our year 5 development and future focus – Presented by Julio Gabay, President & CEO of Abacus Worldwide
9:45AM–10:45AM	Firm Introductions – Each member will give a three minute presentation on their firm, skill sets, activity within the network and new opportunities for developing business.
10:45AM–11:00AM	Networking Coffee Break
11:00AM–12:30PM	Global Outlook Panel Session – in-depth discussion on global changes and challenges facing the accounting and legal profession, managing client expectation, and growing the business in uncertainty.
12:30PM–2:00PM	Lunch
2:00PM–3:00PM	Firm Introductions – Each member will give a three minute presentation on their firm, skill sets, activity within the network and new opportunities for developing business.
3:00PM–3:15PM	Networking Coffee Break
3:15PM–4:00PM	Doing Business in the UK – We will hear from our UK member firms on opportunities and challenges with doing business in the UK as well as an update on Brexit future outlook
5:00PM–7:00PM	Networking Tour – Delegates and accompanying Spouses and Guests are invited to a sightseeing tour of London – we will depart from the hotel lobby at 5:00PM sharp
7:30PM–9:30PM	Networking Dinner at Heddon Street Kitchen – Delegates and accompanying Spouses and Guests are invited to dinner at Gordon Ramsay's Heddon Street Kitchen located just off Regent's Street, in the heart of the West End
Attire:	Business Casual
Saturday October 21 st	
7:30AM–8:45AM	Breakfast is included with your hotel stay
9:00AM–10:30AM	Practice Management – Collaboration and Business Opportunities Round-table Session – Session moderated by Jim Metzler – members will discuss current firm management hurdles, fresh ideas for managing a professional service firm, and new ways to grow a practice
10:30AM–10:45AM	Networking Coffee Break
10:45AM–12:00PM	Cont'd Practice Management – Round-table Session – Session moderated by Jim Metzler – members will discuss current firm management hurdles, fresh ideas for managing a professional service firm, and new ways to grow a practice
12:00PM–12:30PM	Closing Remarks – The way forward – Julio Gabay
12:30PM–2:00PM	Closing Lunch – accompanying Spouses and Guests are invited to lunch with Delegates
Attire:	Business Casual

CPE Information

Annual World 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 global developments and activities in place within Abacus Worldwide. • Improve and maintain profitability through capitalizing on new opportunities. • 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>Cancellation of delegate registration must be submitted in writing via email at info@abacusworldwide.org and must be received on or before September 6, 2017 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 September 6 to October 2, 2017. No refunds will be granted after October 2. 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>\$1050 for members \$1150 for non-members</p> <p>Conference participants can earn up to 8.5 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>
<div style="display: flex; align-items: flex-start;">  <p><i>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</i></p> </div>	

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 **September 6, 2017**.

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 **September 6, 2017**.

REGISTRATIONS MUST BE RECEIVED BY ABACUS WORLDWIDE BY SEPTEMBER 6, 2017 AT 5:00PM EASTERN

Payment Form

Type	Fee	# of Attendees	Subtotal
1 st Delegate Registration (Abacus Members)	PRE-PAID	X <u>1</u>	= <u>00.00</u>
2 nd Delegate Registration (Abacus Members)	US \$1050	X	= _____
Delegate Registration (Non-Abacus Members)	US 1150	X	= _____
Accompanying Guests/Spouse	US \$700	X	= _____

TOTAL	= _____	= _____
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Delegate Registration Fee Includes: Opening Cocktail Reception/Hors D'oeuvres; Walking Tour; Dinner at Heddon Street Kitchen; Conference Coffee Breaks; Conference Lunches; and all Conference Sessions & Materials.

Guest/Spouse Registration Fee Includes: Opening Cocktail Reception/Hors D'oeuvres; Spouse Tour/Museum as well as Lunch and Walking Tour; Dinner at Heddon Street Kitchen; and Closing Lunch with Delegates.

I will Send Payment via Check from a US Bank

Please Charge my Credit Card Below

Credit Card Type: Visa Master Card Discover American Express

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", then "save as", then save to your computer, and email saved form to Abacus via info@abacusworldwide.org by no later than **September 6, 2017**
If paying via US check, mail payment to: P.O. Box 56-1166 Miami FL 33256-1166, USA by no later than **September 6, 2017**.

Hotel Reservations

To **reserve your discounted room** at the Conrad London St James, please click the following link: [Book your group rate for the Abacus Worldwide Annual Conference](#)

The Abacus Worldwide Conference rate at the **Conrad London St James** is **£ 258.00** per night for **single** occupancy and **£ 278.00** for **double** occupancy. Room rates also include **VAT** and **English Breakfast**. For booking an **upgrade to a suite**, please make requests to [Abacus Worldwide](#) and you will be directed to the hotel contact for booking.

Room Type	Rate	How to Book Reservation
Deluxe Room Single	£ 258.00	Book your group rate for the Abacus Worldwide Annual Conference
Deluxe Room Double	£ 278.00	Book your group rate for the Abacus Worldwide Annual Conference
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 commissionable and are quoted inclusive of VAT and Breakfast. VAT is currently at 20%. Taxes are subject to change.

To receive the group rate, reservations must be made no later than September 6, 2017. Reservations requested by attendees after this date will be accepted based upon availability. Quoted sleeping rates will be offered, based on space and rate availability, to attendees 3 days before and 3 days after the conference dates of October 19 and 20.

HOTEL DEPOSITS / CANCELLATION POLICY / CHECK-IN/OUT

A deposit equal to one night's stay is required to hold each guest's reservation and will be charged at the time the reservation is made. Upon check-in, the deposit is applied to the first of the reserved stay. **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.

FEES AND DEADLINES AT A GLANCE

Action	How	Cost	Send Payment To	Deadline Date
Register for Conference	Send above form to Abacus Worldwide	Delegate Fees: 1 st Delegate PREPAID \$1050 per additional delegate member \$1150 per non-member \$700 per accompanying guest/spouse	Abacus Worldwide	September 6, 2017, 5:00 PM Eastern
Book Hotel	Contact the Conrad London St James	£ 258.00 single or £ 278.00 double per night, VAT and Breakfast included.	Conrad London St James	September 6, 2017
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 by no later than 5:00 PM Eastern on **September 6, 2017**.

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 **GBP £**.

CANCELLATION POLICY

DELEGATE: Cancellation of registration must be submitted in writing to Julio Gabay via email at julio@abacusworldwide.org and must be received on or before September 6, 2017 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 September 6 to October 2, 2017. No refunds will be granted after October 2 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 October 2, 2017 for a partial refund of 50% less a \$75 registration cancellation fee. No refunds will be made after October 2. 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 2017 World 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 **September 6, 2017**.

GROUND TRANSPORTATION TO HOTEL

From Heathrow Airport to the Conrad London St James:

Distance from Hotel: 16 miles

Taxi

Drive Time: 45 minutes

Taxi Typical Minimum Charge: £80.00

Train/Tube

Underground/Tube

Time: 60 minutes

Typical Cost: £6.00 - £12.00

Heathrow Express

Time: 45 minutes

Typical Cost: £22.00

Follow the signs at Heathrow Airport to ticket booth/platforms and information on trains

Hotel Address:

Conrad London St James

22-28 Broadway,

London SW1H 0BH,

United Kingdom

Tel: +44 203 3018080

Fax: +44-203-3011380

WEATHER

Average temperature in London during October is High 56° to Low 45° (F) -- High 14° to Low 7° (C).

OTHER ACTIVITIES WHILE IN LONDON

For more information on attractions and activities in and around London please visit: <http://www.visitlondon.com/>. In addition, if you require further assistance or guidance with regard to your visit to London, 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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