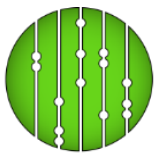


NA Regional Meeting

3rd Annual Meeting for Abacus
North America Members



ABACUS
WORLDWIDE

May 3-4, 2020
The Waldorf Astoria Buckhead
Buckhead/Atlanta, Georgia
USA

The Meeting

Abacus Worldwide brings firms together on a global scale but our Regional Meetings aim to connect members in a more localized environment. At our Regional Meetings member firms network, share local knowledge, exchange business ideas and discuss similar jurisdictional challenges.

We hope to see you in Buckhead/Atlanta on May 4, 2020 for our North America Regional Meeting held at The Waldorf Astoria Atlanta Buckhead.

Please also remember that each North America regional member's 2020 dues include one pre-paid delegate registration for this conference regardless of participation, so please register to attend and have your firm represented in Buckhead.

Social Program Highlights

Sunday evening, we kick off the North America Regional Meeting in Buckhead. Delegates and guests will enjoy a welcome drink at the hotel followed by a networking dinner. Don't miss this wonderful evening of food, friends and networking!

Educational Agenda

Sunday May 3 rd	
6:30PM – 7:15PM	Welcome Drink – Kick-off the conference and enjoy the evening together. Delegates and Guests will have a welcome drink in the hotel.
7:15PM – 9:30PM	Networking Dinner – Delegates and Guests will enjoy a networking dinner.
Attire:	Smart Casual
Monday May 4 th	
7:30AM – 8:45AM	Breakfast – Continental outside the meeting room
9:00AM – 9:45AM	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 and Jessica Levin, Abacus North America Regional Director
9:45AM – 10:15AM	Firm Introductions – New Members Only
10:15AM – 10:30AM	Networking Coffee Break
10:30AM – 12:00PM	Branding - Your Culture Your Brand – Presented by Jessica Levin , Abacus North America Regional Director and founder of Seven Degrees a marketing consulting firm. In this session we will discuss the importance of having your internal culture match the message that goes out to the public.
12:00PM – 1:30PM	Lunch
1:30PM – 2:30PM	Regional Hot Topic – State and Local Taxation Update – Presented by Tim Clancy, Principal and SALT Leader at Windham Brannon – we will hear some the latest issues and opportunities in state and local taxation.
2:30PM – 2:45PM	Networking Coffee Break
2:45PM – 3:45PM	Practice Management Roundtable session – Staffing Recruitment & Retention
4:00PM – 5:00PM	Closing Reception at Windham Brannon Abacus Members in Atlanta
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 17th, 2020 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 17th to April 17th, 2020. No refunds will be granted after April 17th. 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 3, 2020**.

REGISTRATIONS MUST BE RECEIVED BY ABACUS WORLDWIDE BEFORE APRIL 3, 2020 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	= _____

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

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 3, 2020** If paying via US check, mail payment to: P.O. Box 56-1166 Miami FL 33256-1166, USA by no later than **April 3, 2020**

Hotel Reservations

To **reserve your discounted room** at The Waldorf Astoria Atlanta Buckhead, please click the following link: [Book your group rate for the Abacus Worldwide NA Meeting](#) to receive the group rate.

The Abacus Worldwide Conference rate at the **Waldorf Astoria Atlanta Buckhead** is **\$229.00** per night for **single** or **double** occupancy for check-in on May 3rd and check-out on May 4th. 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
Waldorf Guest Room Single/Double	\$229.00	Book your group rate for the Abacus Worldwide NA Meeting
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 do not include taxes. Taxes are subject to change.

To receive the group rate, reservations must be made **before April 3, 2020**. 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 4th. 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.

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 \$700 per additional delegates \$850 per non-member	Abacus Worldwide	April 3, 2020
Book Hotel	Contact the Waldorf Astoria Buckhead/Atlanta	\$229.00 single or double per night Tax is not included	Waldorf Atlanta	April 3, 2020, 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 3, 2020**.

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 17th, 2020 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 17th to April 17th, 2020. 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 17th, 2020 for a partial refund of 50% less a \$75 registration cancellation fee. No refunds will be made after April 17th. 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 2020 NA Regional Meeting. 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 3, 2020**.

GROUND TRANSPORTATION TO HOTEL

The Waldorf Astoria Atlanta Buckhead is a 35-min drive or train ride from Hartsfield-Jackson Atlanta International Airport (ATL).

Distance from ATL to Hotel: 19 miles/30.5km

Arrival options are available at the following link: <https://waldorfastoria3.hilton.com/en/hotels/georgia/waldorf-astoria-atlanta-buckhead-ATLWAWA/about/directions.html>

MARTA/Train

MARTA Typical Minimum Charge from ATL Airport: \$3.50 (Follow signs in airport. Take train to Buckhead Station the hotel is a 2 minute walk from the station)

Taxi

Taxi Typical Minimum Charge from ATL Airport: \$50.00

Hotel Address:

Waldorf Astoria Atlanta Buckhead
3376 Peachtree Road NE,
Atlanta, Georgia, 30326, USA

Tel: +1-404-995-7500

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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