



Thanks for considering my seminars for your continuing education needs. Click the seminar name to read its description. Click below for the order form. Don't hesitate to contact me at any time for help and support.

John Purtill

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How to Be an Effective Corporate Controller (ECC)

Keyword: Controller
Area: A&A, MGT, IT
Author: John Purtill, CPA
Level: Basic/Intermediate
Prerequisites: None

Credit Hours: Accounting - 4
Management - 1
Regulatory Ethics - 1
Business Law - 1

Description: The profession's leading controllership course focuses on the techniques and skills required to be an effective financial manager. Program leaders are experienced controllers, CFOs and general managers. The modern controller has to satisfy new organizational demands, including management reporting, ethical watch dog, top leader and advisor to other managers. All this, while still doing the monthly closing on time!

Designed for: Designed for the new controller or controller-to-be as well as for the experienced controller who wants to break out into a new career track. Good for controllers in companies of all sizes and for CPAs who provide controllership services.

Objectives:

- # Discuss controller role and learn how to fulfill CEO expectations
- # Learn ways to improve leadership skills and improve productivity
- # Develop an action plan to deal with fraud in today's environment
- # Learn how to develop reporting packages to help run the business more effectively

Topics:

- # Assessing and negotiating the controller's job, meeting the CEO's expectations
- # Organizing the department, leadership, recruiting, performance evaluation, terminating employees
- # Effective fraud prevention and changing professional standards
- # Best practices: strategic planning, flexible budgeting, metrics, EDI, electronic payment systems
- # HR issues
- # Improving management reporting

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Annual Update for Today's Controller (ACU)

Available in 2013!

Keyword:	Management, update, Controller, CFO	Credit Hours:	A&A - 4
Field of Study:	Accounting, Taxes		Taxes - 2
Author:	John Purtill, CPA		Other - 2
Level:	Intermediate		
Prerequisites:	None		

Description: John and Jay Purtill developed this course concept in 1995. Our participants and leaders tell us they prefer this to imitations. ACU is intended to provide a seminar that management CPAs can attend every year, knowing the content will be new and relevant and that the seminar leader will be one of the best. In past years, CPAs in management have learned about benchmarking, EDI, effective management reporting, electronic commerce, cash management developments and other hot topics first from this program.

The best endorsement for this seminar is past participants. At the end of every seminar, participants were asked if they would attend ACU next year. In every session, between 97% and 100% of the participants answered "Yes." Timely topics and top-quality seminar leaders should bring industry members back to this course year-after-year.

Designed For: Specifically for controllers, CFOs, treasurers and other financial managers in middle-market companies (the size tier under the Fortune 500).

Objectives:

- # Get up to date on leading edge topics
- # Network with peers

Topics:

The seminar is designed as an update on major important developments that affect management CPAs. For that reason, the course is updated continuously during the year and the final topics for a session are chosen about 45-60 days in advance. We typically select four to six topics and sometimes select an overarching theme for the seminar.

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How to Reinvent Corporate Management Reporting (CMR)

Keyword: Financial Reporting, Controller, CFO
Field of Study: Business Management & Organization
Author: John Purtill, CPA
Level: Intermediate
Prerequisites: None

Credit Hours: Accounting - 6
Management Advisory Services - 2

Description: Management reporting is very different from financial reporting! Simply generating a financial statement is just not serving company management! Managers want a system that gives them a finger on the pulse of the business. The information is there, but the trick is to get it into the hands of the right people, timely! This program shows how to assess needs, design reports, use new computer-based tools and communicate effectively. It shows how to speed up the information cycle, including doing instant close at month end.

Designed for: Controllers, CFOs, corporate accountants and financial managers.

Objectives:

- # Improve internal operations reporting
- # Improve implementation of the business plan
- # Simplify accounting operations
- # Move essential business information faster
- # Learn to produce meaningful management reports to help managers make informed decisions
- # Size up management's real information needs and fulfill them with well-designed reports

Topics:

- # Use management reporting to support the business plan
- # Management reporting technology
- # Management reporting needs analysis
- # Create a dashboard
- # Create a vital signs report
- # Advanced topics: EIS and XBRL
- # Implementing faster reporting

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Controller or HR Director: Personnel And Regulatory Issues (PRI)

Keyword:	Human Resources, Controller, CFO	Credit Hours:	Business Law - 8
Field of Study:	Personnel/HR		
Author:	John Purtill, CPA		
Level:	Intermediate		
Prerequisites:	None		

Description: Modern financial managers know that their people management skills are as important as their finance and technology skills. In many companies, the controller is also responsible for the human resources function. It is a challenging job that requires the CPA to learn an entirely new set of skills. Today's regulatory environment contains many traps for today's controllers, and this course provides the practical guidance and resources. It contains up-to-date practical discussions of EEO, ADA, sexual harassment and other regulatory issues. Participants also gain vital firsthand experience in employee recruitment, interviewing and training.

Designed for: Management CPA with department or HR responsibility. CPA who provides top management consulting or external controllership services.

Objectives:

- # Reduce EEO and personnel claims and litigation
- # Develop an effective HR system
- # Use modern tools to handle HR responsibilities
- # Recruit more effectively

Topics:

- # HR alphabet soup: ADA, USERRA, EEOC, FMLA, and others
- # Exempt status--who is and isn't in today's rules
- # Hiring, firing, disciplining employees without risking lawsuits
- # How to develop an effective legal position description
- # Developing employee handbooks
- # How to check references, credit and criminal records
- # New developments

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What CPAs Need to Know About Wage and Hour Overtime Laws (FLSA)

Keyword: Controller, HR Director
Field of Study: Personnel/HR
Author: John Purtill, CPA
Level: Basic/Intermediate
Prerequisites: None

Credit Hours: Business Law - 8

Description: Beginning with the controversial FairPay overtime regulations, the Department of Labor has placed a new and focused emphasis on wage and hour issues. The DOL has issued many new regulations and interpretive guidelines, which cover much more than overtime. The result is an energized DOL, armed with a uniform nationwide set of rules and regulations replacing informal, unofficial rules. These changes affect millions of workers, and every employer must reevaluate how it handles all wage and hour issues.

Designed for: All CPAs, whether in public practice or industry, who are involved with payroll as employers, finance officers, internal auditors, external auditors or consultants and non-CPAs in HR.

Objectives:

- # Training on Wage and Hour regulations
- # Learn fine points of overtime, exempt status, “child” labor, minimum wage

Topics:

Exempt status: who is covered by FLSA, special industry exemptions, Computer tools

Minimum wage

Overtime Pay, Comp time rules

Child and youth labor

Record-keeping

Handing DOL audits

Special Topics: tips, agriculture, “Chinese” overtime, delivery drivers, students, household employees

Exclusive - how the PWC judgement will affect you!

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LIFO Inventory: Tax and Accounting Issues (LIFO)

Keyword: Inventory
Field of Study: Taxes- Special Tax Matters
Accounting - Specific Items
Author: John Purtill, CPA
Level: Basic/Intermediate
Prerequisites: None

Credit Hours: Accounting – 4
Tax - 4

Best if held from November 15th to January 31st

Description: 60% of major companies and 75% of auto dealers use LIFO, and this is the only complete LIFO course available. Written by a leading LIFO practitioner, it covers a practical, easy-to-use approach to LIFO that eliminates the confusion most CPAs feel when they encounter LIFO inventories. Provides current, coverage, including techniques to protect a company’s LIFO election and current IRS, AICPA and SEC developments. Numerous case studies and examples to clarify issues and provide practice in applying LIFO.

Designed for: CPAs with accounting, reporting, tax or financial management responsibilities in companies that use LIFO inventory. Essential for CPAs who audit these companies and must include LIFO information in financial statements.

Objectives:

- # Improve benefits and avoid tax problems with LIFO
- # Improve financial statement reporting
- # Discuss advantages and disadvantages to adopting LIFO and how to implement the adoption

Topics:

- # How LIFO works, tax benefits, when not to use it, technical resources
- # How to apply LIFO, specific goods, dollar-value method, inventory pooling
- # Determining inflation indexes, item definition **Exclusive! IPIC method and how to adopt it**
- # How to adopt LIFO, conformity requirement, financial reporting requirements
- # Financial statement reporting
- # Changing LIFO methods, terminating LIFO, converting from “C” to “S” business combinations
- # LIFO for auto dealers, choices of methods – pros and cons, available software, recent developments
- # Bargain purchases, retail LIFO, simplified LIFO, uniform capitalization rules [Return to menu](#)

Best Practices in Corporate Cash Management (CCM)

Keyword: Cash Management
Field of Study: Business Management & Organization
Author: John Purtill, CPA
Level: Intermediate
Prerequisites: None

Credit Hours: Finance - 8

Description: Learn how to improve treasury and cash management operations. This course contains techniques and tools used by modern companies to improve cash flows, cut operating costs and reduce risks. Meet the increasing need for management of treasury operations, including electronic commerce and effective cash flow forecasting. Author is the author of the AICPA's MCS cash management practice aid.

Designed for: CPAs in management and consultants to provide a background in the latest treasury management techniques, as well as a refresher on overlooked opportunities.

Objectives:

- # Discuss opportunities to improve control of working capital
- # Review new developments in funds management
- # Learn electronic cash management opportunities
- # Learn new ways to cut costs of transaction processing
- # Develop a cash flow plan and solve common cash flow planning problems

Topics:

- # Customer and vendor relations: Collection and disbursement management
- # Electronic cash management
- # Opportunities to improve cash management
- # Disbursements processing alternatives
- # Fraud prevention

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Best practices in Business Risk Management (ERM)

NEW!

Keyword: Controller, CFO, risk management, accounting, consulting
Field of study: A&A, Mgt, IT
Author: John S. Purtill, CPA
Level: Intermediate
Prerequisites: None

Credit Hours: A&A -4
Management - 4

Description: After 9/11, Katrina and Virginia Tech, financial managers are rethinking and creating ways to protect their companies and finance operations. ERM encompasses risk assessment and planning, disaster recovery and business continuity. Effective ERM involves a team effort and careful risk analysis by top company leaders. It requires them to assess critical functions, key threats and to develop strategies to avoid, react and recover from serious threats to company survival. In today's lean organization, resources are scarce for this type of effort, so the plan must be practical and easy to keep current.

Designed For: Designed for controllers, CFOs, treasurers and other financial managers in middle-market companies (the size tier just under the Fortune 500) and their management advisors.

Objectives:

This course does not cover audit risk management.

- # Understand the nature of risk management and various approaches.
- # Exchange ideas on ERM.
- # Comply with guidance from professional authorities.
- # Learn how to manage six critical risk areas: business data, facilities and production, financial and legal, human resources, communications, market concentration.

Topics:

- # Authoritative guidance.
- # Practical approaches for each area.
- # Identifying threats, critical functions.
- # Organizing for ERM.
- # Insurance solutions for ERM.

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How to Consult with a Start-Up Business (CSB)

Keyword: Start-up
Field of Study: Finance
Author: John Purtill, CPA
Level: Intermediate
Prerequisites: None

Credit Hours: Finance - 1
Management Advisory Services – 7

Description: New business formation is on the rise, and the trend promises to continue because entrepreneurs have seen the success and independence that comes from owning a business. They've seen that today's start-up can be tomorrow's Wal-Mart or Microsoft! When the economy softens, employees cover their options by setting up businesses as fall-back options. The result: millions of new businesses are formed each year and CPAs need to be part of the action to advise the start-up.

Designed for: CPAs who help clients to begin their own businesses.

Objectives:

- # Improve chances of business success
- # Provide better client service and new service opportunities
- # Avoid common mistakes in business start-ups
- # Equip CPAs with useful client checklists and business resources

Topics - How to:

- # Create a start-up business consulting practice
- # Coach owners in developing a business plan and making necessary decisions
- # Understand the importance of market differentiation
- # Advise on the right type of legal entity and market differential
- # Assist in the raising of start-up and expansion money
- # Show non-financial people the options and importance of record keeping and payroll
- # Teach non-financial clients the fundamentals of income, sales and payroll taxation

Inspired by our successful business owner's start-up classes, this unique course is the only program available for CPAs wanting to start or expand their consulting services in the expanding, distinct start-up market.

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How to Buy or Sell a Business (BSB)

Keyword: Buy/sell, acquisition, merger
Area: A&A, MGT, TAX
Author: John Purtill, CPA
Level: Intermediate
Prerequisites: None

Credit Hours: Management Advisory - 6
Accounting - 2

Description: Mergers and acquisitions are not just about tax considerations! Shows CPAs how to play a vital high-profile role, including participation in decisions. Written and taught by CPAs with experience in thousands of business purchases and sales, this course provides practical coverage of the management and ownership aspects of business purchases and sales, including pricing and negotiating strategy. The highlight of this course is a case study that allows you to apply what you have learned, in a competitive business environment.

Designed for: Designed for CPAs in consulting roles and management to provide a background in how to effectively assist in getting the best deal in a business acquisition or sale and how to avoid the many pitfalls on buy/sell transactions.

Objectives:

- # Set the right starting price for negotiating
- # Structure the transaction for best tax advantage
- # Negotiate more effectively, avoiding tricks the opposition will use to gain advantage
- # Make a thorough investigation of the transaction

Topics:

- # Overview: elements and structure of buy/sell; opportunities for CPAs
- # Matching buyers and sellers; working with brokers; commission pricing
- # Marketplace analysis; how to investigate the target, using available data sources
- # Setting the price; valuation methods, terms of purchase/sale; letters of intent
- # Negotiation strategy; three phases of negotiation, techniques; preparation, deadlock, walkouts
- # Due diligence, including a detailed checklist
- # Accounting and tax considerations
- # Case study. Put what you've learned to use

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Keyword: Management, Controller, CFO, treasurer, CEO **Credit Hours:**
Area: Ethics
Author: John Purtill, CPA
Level: Basic/Intermediate
Prerequisites: None

Ethics - 4

Description: This course is not an ordinary ethics course. It was designed specifically to provide practical ethics education for CPAs who work in management positions. It begins with the AICPA Code of Ethics, but departs from ethical training provided for public practitioners by covering other ethical guidance, including other professional authorities and case law. The course leaders all are experienced controllers, CFOs and general managers.

Designed for: Designed for working financial and general managers - CFOs, CEOs, treasurers, controllers, finance directors, department heads who want practical coverage of what you can and cannot ethically do.

Objectives:

- # Examine real-life ethical dilemmas, using practical case studies.
- # Discuss and contrast different sources of ethical guidance.
- # Learn solutions to ethical dilemmas.
- # Learn how to create and administer practical corporate ethics codes and policies.

Topics:

- # Contrasting and understanding: Ethics, morals, values, laws
- # Creating and administering the company ethics function
- # How ethics influences the company image: consumers, investors, suppliers
- # Ethics authorities: common law, regulatory guidance, AICPA, FEI, IMA, AFP
- # Solving an ethical dilemma - a practical approach
- # Negotiating ethically, drawing the line
- # Case studies (instructor will choose two of these to cover): earnings management, false impressions, unfair advantage, business negotiation, condoning

Protecting Against Technology-Based Frauds (PTF)

NEW!

Keyword: Management, Controller, CFO, Treasurer
Area: Accounting fraud, IT
Author: John Purtill, CPA and Edwin Monteiro, CPA
Level: Basic/Intermediate
Prerequisites: None

Credit Hours:

A&A - 4

Description: This course equips managers with information they need to know their vulnerabilities and some of the solutions. Your accounting system is more vulnerable than you think. In today's flat accounting organization, the money to provide the internal checks and balances is hard to find. Most of us manage a mixture of manual and computer systems and we rely on the system developers and IT professionals to insure our safety. Are they doing a good job. An attack can come both from outsiders and from insiders.

Designed for: Designed for working managers responsible for managing business functions for money movement, payments, collections, financial statements.

Objectives:

- # Discuss computer system vulnerability.
- # Learn solutions to common frauds.
- # Discuss ways to control fraud cost-effectively.

Topics:

- # Intrusion techniques for business databases.
- # Accounting systems design considerations.
- # Combating payments fraud: checks, card, wire, ACH.
- # Combating collections fraud.
- # How to do a security checkup.
- # Securing wireless systems.
- # Best practices in fraud protection.
- # Backup and recovery considerations.

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Seminar Leader Listing

We've built our core group of seminar leaders over years of careful selection, scheduling and communications. They are located through the US for easy and cost-effective travel to all 50 states. They are a prime resource in our program development, and rate at the top of all instructors in the US.

Click the name for a short profile.

[Scott A. Arnold, CPA/CMA/MBA](#)

Mansfield OH

[David G. Ciarlette, CPA](#)

Mokena IL

[Lester Coffey, CPA](#)

Washington DC

[T.P. Hall, CPA](#)

Powder Springs GA

[Sheldon Mutchnick, CPA](#)

Richmond VA

[John Purtill, CPA](#)

Cheshire CT

[Ron Rael, CPA](#)

Smammish WA

[John L. Ruggiero, CPA](#)

Winston-Salem NC

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Planning Considerations

We'll book a seminar any time and any place you want it. That said, we've found there are differences in how our audience - management CPAs - approaches CPE that have scheduling importance. To maximize your head count and better serve this important group, we make these scheduling recommendations:

- # Avoid the following dates:
 - ! The first 10 days of any month to avoid conflict with month end closings.
 - ! The month of August as vacation schedules force management CPAs to cover for employees.
 - ! Mondays. That's staff meeting day - a command performance.
- # Avoid 3 straight days of industry-oriented CPE. We rarely find anybody who can take 3 days off for CPE. Instead, place a consultant-oriented course - BSB, CSB, LIF, CCM - in the middle.
- # Do hold seminars in or near commercial or industrial areas where management CPAs work.
- # In advertising, give management CPAs a benefits statement they can use to justify time away from the office.
- # In a good economy, management CPAs are topic-and-time sensitive; not price-sensitive. In a down economy, they're just like public practitioners.

We also think the success of a program depends on the time of the year it's offered. Consulting programs have better attendance in late spring or early summer after tax season. These programs offer CPAs great opportunities to build their client base or offer extended services. If offered in the fall, they will compete against the other tax and accounting programs.

Clustering: In many states, we have had success clustering our programs and promoting controllership packages. This high profile promotion improves the state society's image as a CPE provider for industry members and builds attendance and provides a way to share travel expense among several programs. Our programs are identified below by category:

Management programs: ECC, CMR, PRI, CCM, ACU, FLSA
Consultant programs: CSB, BSB, CCM
Tax and accounting programs: LIF, CMR

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Order Form

Title	Code	Dates	Locations	Leader
How to Be an Effective Corporate Controller	ECC			
Best Practices in Corporate Cash Management	CCM			
How to Reinvent Corporate Management Reporting	CMR			
Best Practices in Business Risk Management	ERM			
Controller or HR Director: Personnel and Regulatory Issues	PRI			
LIFO Inventory: Tax and Accounting Issues	LIF			
How to Consult with a Start-up Business	CSB			
How to Buy or Sell a Business	BSB			
Annual Update for Today's Controller	ACU			
What CPAs Need to Know About Wage & Hour Overtime Laws	FLSA			
Ethics for Financial Managers	EFM			
Protecting Against Technology-Based Frauds	PTF			

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Seminar Leader Profiles

Scott A. Arnold, CPA/CMA/MBA, Mansfield OH. CFO of MT Business Technologies, Inc. leading independent provider of office technology solutions and operator of technology super centers. Held positions as CFO of a national financial services company, a national hair salon chain and a toy manufacturer. Heavily experienced in technology cash management, retail operations, financial reporting, human resources and information systems.

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David G. Ciarlette, CPA Mokena, IL. Management consultant and managing partner of Ciarlette & Robbins, serving fast-growing, entrepreneurial clients. Previously, president of Kemlite Corporation in Joliet, IL. Held positions as corporate controller, division controller, group controller.

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Lester Coffey, CPA Washington DC. President of the financial and business consulting firm, Coffey Communications, LLC. Speaks nationally on career development, performance improvement, business planning, credit management and financing. Author of many published articles including a government publication on unemployment insurance.

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T.P. Hall, CPA. Powder Springs GA. Professional trainer and consultant with HA&W Mescon Group, a consulting division of Habif, Arogeti & Wynne. Professor of Business Administration at Kennesaw State University College of Business. Professor Emeritus at Georgia State School of Accountancy. Internationally known speaker and trainer in business and industry, trade associations and the US Government.

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Robert F. Koslow New Castle, PA. Managing Partner RFK Enterprises and well-known turnaround specialist, Past Chairman & CEO, First Commonwealth Bank/People's Bank of Western PA.

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Sheldon Mutchnick, CPA Richmond VA. President of SFT Corporation which provides financial-oriented management development training and advisory services to construction firms, manufacturers, technology services companies, professional firms, and not-for-profits. Held positions as controller, CFO and Vice President.

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John Purtill, CPA, Cheshire CT. CEO of Purtill & Company, a management accounting and consulting firm providing financial management assistance to middle-market companies. Held positions as Controller, VP Finance, Division CEO in two Fortune 500 companies. Author of AICPA MCS cash management practice aid. Past Governor of the Connecticut Society of CPAs, chair or member of many state and AICPA committees and task forces. Outstanding seminar leader awards from AICPA, CT, NY, IL

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Ron Rael, CPA Smammish WA. Professional trainer and speaker in planning, budgeting, management effectiveness, employee teams, productivity and finance departments. Held positions as controller and financial executive with successful middle-market companies. Washington Society of CPAs Discussion Leader of the Year.

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John L. Ruggiero, CPA Winston-Salem NC. EVP/CFO, of Worldtex, Inc. and Scovill Fasteners, Inc. and is CEO of Rookwood Associates, a finance and real estate consulting firm. Held positions as financial executive for both public and private companies in manufacturing, distribution, direct marketing and publishing. Connecticut Society of CPAs Distinguished Discussion Leader.

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Seminar fee excluding leader travel expense based on society printing the manual:

Price per participant	\$110
Minimum participant count	19

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Standard transportation
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