

FRANK SANITATE ASSOCIATES WORKSHOPS FOR CPAS/CAS

COMMUNICATION

Conflict Resolution: How to Move from Adversarial to Amicable Outcomes in Any Communication	2
Getting Through To People: Leading Edge Communication Skills For CPAs	3
Effective Writing for CPAs: Simplify the Process; Simplify the Product; Manage Email	4

ETHICS

How to Be Seriously Ethical and an Effective CPA: Finding Renewed Meaning in the Practice of Accounting	5
--	---

FINANCIAL PLANNING

Securities Investing Today: Managing Assets for your Clients, Your Firm and Yourself	6-7
Current Issues in Pension Investing – Including the Pension Protection Act (PPA) of 2006 (1/2 day)	8
Investment Strategies for Uncertain Times (1/2 day)	9

MANAGEMENT/PRACTICE MANAGEMENT

Managing People, Performance and Pressure: A Workshop for CPAs in Industry	10
Getting On Top of It All: The New Science of Increasing Productivity in Yourself and Others	11
The Leadership Challenge: Leading Change and Inspiring Others	12
Time Mastery for CPAs: Over 100 Ways to Maximize Your Productivity and Satisfaction	13-14
The Speed of Life: How to Slow Down, Produce More and Serve Clients Better	15

PERSONAL DEVELOPMENT

Ten Trends that Will Affect Your Future – and How to Benefit from Them Now	16
Achieving Balance in Work and Life	17
Building A Successful Retirement in Spite of No Time, No Money and Almost No Planning (1/2 day)	18
Problem Solving and Creative Thinking	19
Triple Your Memory and Confidence, and Halve Your Stress	20
Shortcuts to Success: The 14 Best Tools for Personal and Professional Growth	21
Don't Go to Work Unless It's Fun! How CPAs Can Become Happier and More Productive	22

ADMINISTRATIVE INFORMATION

INSTRUCTOR BIOS	23
TABLE OF CONTENTS BY INSTRUCTOR	24

MISSION STATEMENT

The mission of Frank Sanitate Associates is to provide exceptional educational workshops and products which transform people's relation to work. We enable you to: Work smarter, produce more and, most of all, look forward to going to work everyday. Our goals are: to make a contribution, make a profit and have fun!

Conflict Resolution: How to Move from Adversarial to Amicable Outcomes in Any Communication

In this workshop you will learn and begin to practice the techniques of Nonviolent Communication, which has been used for the last thirty years to successfully resolve disputes between Israelis and Palestinians, in South Africa, Bosnia, Rwanda and other global hotspots. However, these techniques are practical, learnable and proven in daily communications with clients, staff, bosses or peers. One participant said, "This training incorporates all the basic tenets of mediation and ties together the concepts of all the psychological masters."

OBJECTIVES

This workshop will enable you to:

- Read the signs for unproductive communications
- Clear underlying emotional issues
- Recognize and cut through static to get to the real issues at stake
- Overcome resistance, antagonism and recalcitrance
- Establish mutual respect
- Greatly increase willingness to cooperate
- Create the capacity to be heard by others

MAJOR TOPICS

- The Principles of Conflict Resolution
- The Process of Nonviolent Communication in Legal Communications
 - The Four Stages in the Communication Process
 - How to distinguish facts, feelings, needs and wants
 - How to cut short dead-end communication
 - Detect and respond to signs of escalation of conflict in yourself and others
 - Recognize and advocate a stopping point when things will only get worse
 - Use language that awakens good will rather than escalates bad will
 - How to get what you want
 - How to enable all parties to get what they want
- Practical Applications (To be drawn from needs of participants)

PARTICIPANT COMMENTS

"Fantastic! I see this approach as a wonderful method that is as applicable to spousal disputes, family relationships as to the business world. I see businesses with extremely high turnover of employees because such businesses do not practice this method! They skip the method to "save" time and exhaust time and lose energy and fail to conserve resources."

"I thought this program was great. I can definitely see the practical application of the technique in many aspects of my life. Mr. Rubio was an excellent speaker and presenter"

"Wonderful program. I did not expect this seminar to actually deal with emotional intelligence—something attorneys typically lack. This is very relevant. . . . This seminar gave me some clues as to how to begin fostering/nurturing and using my unique gifts in the practice of law. Thank you!"

"Finally a *human* seminar that's not touchy-feely. I thought this was very useful."

LENGTH	1 Day	INSTRUCTOR:	Jorge Rubio-Vollert	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Basic

Getting Through to People: Leading Edge Communication Skills for CPAs

80% of our headaches come from the “bottom” 20% of our clients. These *special* people (we might sometimes include staff, managers and partners we have to deal with as well) are the complainers, snipers, flakes, and ogres that make our lives miserable. If much of your time and energy is spend avoiding, accommodating, and tolerating these difficult people, then this workshop is designed for you.

OBJECTIVES:

This workshop will enable you to:

- ❖ Develop stronger partnerships with people you have previously wanted to avoid.
- ❖ Get through to people from other planets by speaking their language.
- ❖ Spend more time getting your job done instead of dealing with difficult people.

MAJOR TOPICS

1. How to identify and understand the four basic communication styles
2. How to solve problems without bruising egos
3. How to short circuit angry people
4. What to do when your "difficult" person is your boss
5. How to know if YOU are the difficult one
6. How to NOT escalate a conflict

PARTICIPANT COMMENTS

“One of the best CPE instructors I have had in 18 years as a CPA! He used his time wisely, did a great job engaging the group and was very knowledgeable about the topic.”

“Great course! I learned a lot of practical information today – this is one of the best courses I have taken this year.”

“Simon was a great speaker who interacted well with the students. I came away with a renewed interest in correcting a situation at work – and the skills to do it. Thank you.”

“Awesome class!”

LENGTH	1 Day	INSTRUCTOR:	Simon D'Arcy; Sean Mason	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Basic

Effective Writing for CPAs

Simplify the Process; Simplify the Product; Manage Email

Clarity, simplicity, and getting to the point not only make your writing more effective; they also create a context for you to operate out of. This workshop will not only train you to write clearly; it will also train you to think clearly.

This workshop will help you to break through writing barriers and give you practical help in communicating clearly and effectively on paper or computer. In it you will analyze writing samples to see how effective they are, and you will practice specific skills which will make you a better writer.

OBJECTIVES:

This workshop will help you to:

- ❖ Write efficiently and enjoy the writing process
- ❖ Organize your writing to have the effect you want it to have
- ❖ Identify and use brief, simple and forceful language
- ❖ Manage the writing and reading of Email

MAJOR TOPICS:

1. Write for Yourself
 - How to get an intelligent start
 - How to get ideas on paper easily
 - How to overcome writing procrastination
 - How to use your left and right brain in writing
 - How to use writing as a tool for creativity

2. Write for your Reader
 - How to get to the point
 - How to account for your ideas
 - How to show your reader your organization
 - How to close appropriately

3. Using Language That Makes a Difference
 - How to be brief by eliminating useless words
 - How to be simple by eliminating stuffy words
 - How to be forceful by eliminating lifeless words
 - How to lower your "Fog Index"

4. E-mail Management
 - How to write effective E-mail
 - The 12 best practices for handling E-mail efficiently

PARTICIPANT COMMENTS

“You are very insightful and enlightening! I look forward to reading your book! Thank you!”
 “Great class with practical ideas that I can implement. Frank keeps your attention.”
 “The exercises and group discussions were great!”

LENGTH	1 Day	INSTRUCTOR:	Frank Sanitate	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Basic

How to Be Seriously Ethical and an Effective CPA: Finding Renewed Meaning in the Practice of Accounting

Are you like many CPAs who feel tired and are somewhat discouraged because the practice of accounting is not what you had expected? In this time of so many law suits against CPA firms, how does the ethical individual CPA keep his or her head up? This workshop will give you a refreshing look at ethics, your firm and yourself. It will also give you 4 immediately useable tools for creating a renewed and ethical firm and self.

OBJECTIVES

This workshop will enable you to:

- Better organize your practice and your life in an integrated and purposeful manner (whether in public or industry)
- Develop common goals, greater consensus and cooperation in your organization
- Resolve complex conflicts and thorny issues quickly
- Improve firm wellness
- Link State Rules of Professional Conduct to personal and firm ethics

MAJOR TOPICS

- The four tools of renewal:**
 - Understanding and creating a 1) **Personal Mission Statement**
 - Discovering and using your 2) **Core Values** to achieve your mission
 - Linking professional and personal ethics
 - Developing an individual 3) **Decision Model**
 - resolve complex conflicts
 - restructure meetings for greater participation and buy-in
 - reduce tension and allow for creative resolution
 - Developing and using a 4) **Values Audit**
 - Use ethics proactively to create firm wellness
 - Create better communication and decision-making
 - Create collegiality, leadership and buy-in
- Understanding how the core Ethics of the Code of Professional Conduct integrate these four tools**

PARTICIPANT COMMENTS

“This seminar greatly exceeded my expectations. It was presented in a thought-provoking way, with details on how to apply it in the future. This is probably the best seminar I have ever attended.”

“Best continuing education I’ve ever attended.”

“He did a great job. Made my required exposure to ethics far more interesting than in the past.”

“Thanks. A great opportunity to focus my energies in the direction I want to go in.”

Note: This workshop should qualify for 3 hours of **Ethics Credit**

LENGTH	1 Day	INSTRUCTOR:	Arthur Gross Schaefer	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Basic

Securities Investing Today: Managing Assets for your Clients, your Firm and Yourself

"The market, like the lord, helps those who help themselves. But, unlike the lord, the market does not forgive those who know not what they do."
- Warren Buffet

This workshop will give you a better understanding of how "Wall Street" works. It includes not only theories of analysis and fiduciary standards, but also performance measurement practices, and other practical knowledge. The content of this workshop upgrades every year as does asset management. The course is taught by a pro who has been a lawyer, stockbroker, Registered Investment Advisor and a trust portfolio manager whose portfolio responsibilities exceeded \$145 million dollars. He has been teaching and writing about Wall Street since 1979. His last book is ***Terror-Proof Your Mind and Money*** written with Jonathan Robinson, published in 2004. He next book will be on oil, minerals and precious metals.

OBJECTIVES

At the end of this workshop, you will:

- Better understand the securities industry and securities investments
- Be better able to evaluate an outside money manager's performance
- Be able to better manage firm assets in a fiduciary capacity
- Be able to manage your own equity and commodity assets more successfully

MAJOR TOPICS

1. Developing a Financial Plan: Income, Goals, Assets, Objectives, Risk Tolerance
2. Learning the Subject Matter of Securities Investing:
 - o Wall Street: the industry, its terminology and concepts
 - o Books and the web methods to learn about securities
 - o Asset allocation and Diversification
 - o Indexing a portfolio
3. Finding Investment Ideas, which are everywhere
4. Analysis of Investment Ideas, the heart of investing:
 - o Types of Analysis
 - Fundamental Analysis
 - Technical Analysis
 - Modern Portfolio Theory
 - Warren Buffet's method - Growth at a Reasonable Price
 - o Personality management (The Psychology Part)
 - o Standards of Prudence - trusts and pensions
 - Participant education issues under ERISA Section 404(c)
 - Prudent investor requirements for annual reviews
 - Macro Analysis and Risks in today's markets
 - Are commodities and precious metals suitable for portfolios?

(continued)

Securities Investing Today: Managing Assets for your Clients, your Firm and Yourself (continued)

MAJOR TOPICS

5. Implementation of Your Investment Ideas, other than yourself:
Money Managers: Mutual funds, stockbrokers, Registered Investment Advisors, trust departments and companies, private partnerships/ hedge funds
 - CFA guidelines for measuring RIA performance
 - The drag of managers' fees and transaction costs

Mutual Funds:

 - Basics of mutual funds - diversification and professional management
 - The Mythology of "track record" and "Stars"
 - Selection and performance of various types of funds, including index funds
 - Stockbrokers, RIAs, Trust Departments and Companies
 - Stockbrokers: How to find and hire one
 - Registered Investment Advisors (RIAs): the high life
 - Trust Depts. & Companies: Common trust funds and the new sales culture
 - Arbitration of disputes in the brokerage industry
6. Monitoring a Portfolio
 - Should You Hold, or Sell? Tactics and Tips
7. Performance Measurement Formula and Paperwork
8. Conclusions and Additional Investment Knowledge
 - John Templeton's conclusion: "Buy Bargains"
 - Using an investment diary, portfolio picture, and "Keeper Notes"

"Predictions are dangerous, especially about the future." - Samuel Goldwyn

PARTICIPANT COMMENTS

“Speaker was very knowledgeable and enthusiastic about the subject and was will to make sure that all attendees actually learned and took away something.”

“Mike was great – very strong in expertise. Able to keep students engaged; very different perspective – really helps change how one might respond to investing.

“As good a course and presenter as I’ve had in a long time.”

**NOTE: 1. This workshop is approved by the College of Financial Planning for CFP-CE credit.
2. This is an intermediate workshop, but includes basic and advanced information.**

LENGTH	1 Day	INSTRUCTOR:	Mike McGowan	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Intermediate

Current Issues in Pension Investing

-- Including the Pension Protection Act (PPA) of 2006 (1/2 day)

CPAs today are being asked to:

- (1) help clients make investment decisions in their pensions
- (2) evaluate investment selections in plans
- (3) serve on the "investment committee" of a 401K plan.

While CPAs are familiar with the legal and tax attributes of securities, they may not be as familiar with the fiduciary responsibilities of securities in pensions. This workshop will give them that knowledge

OBJECTIVES

This workshop will enable you to:

- ❖ Understand the pension fiduciary framework, especially of 401Ks
- ❖ Properly evaluate and administer pension investments
- ❖ Understand highlights of the Pension Protection Act (PPA) of 2006

MAJOR TOPICS

1. Pension plans generally; the necessity of "Investment Policy Statements" for a 401K.
2. Learning about securities investing: Modern Portfolio Theory vocabulary and Wall Street "analysis"
3. Cases relating to ERISA fiduciary standards : *Unisys* (Section 404A) and other cases
4. Defined contribution investing practices (taken from a 7 step chronological model)
 - A. Analysis of pension investments/asset allocation
 - B. Peak Oil and Precious Metals
 - C. Implementation using an RIA, MF, Trust Co, or Broker/Dealer
 - D. Monitoring and documenting fiduciary activity
 - E. Measuring performance of plan assets...and then doing something about it
5. Recent 401k developments, especially the PPA of 2006 and "employee education"
6. Pension audit issues, avoiding potential litigation, appendices and additional resources

PARTICIPANT COMMENTS

"Very good speaker. I look forward to more courses with him!"

"Mr. McGowan clearly knows his subject."

"Speaker was great – very strong in expertise. Able to keep students engaged; very different perspective – really helps change how one might respond to investing."

LENGTH	1/2 Day (4hrs)	INSTRUCTOR:	Mike McGowan	PREREQUISITE:	None
CPE CREDIT	4 hours	ADVANCE PREPARATION:	None	LEVEL:	Intermediate

Investment Strategies for Uncertain Times (1/2 day)

Whether we're having a Bull or a Bear market can determine over 80% of your financial performance. To avoid financial difficulties, it's important to be able to strategize clearly during uncertain market conditions, especially when accurate information is difficult to get from corporations, brokerage house analysts, the media, or even government statistics.

This workshop is designed to help professionals with practical methods of handling bear market conditions as well as bull market over-confidence. Some of the material and comments in the workshop will be "topical" depending on actual market conditions when the course is delivered. An annotated bibliography emphasizing the web will be provided, along with the instructor's 40+ years of market experience, especially his approach favoring "realism" in investing.

OBJECTIVES

This workshop will enable CPAs to:

- ❖ Understand the necessity, psychology and operation of different market conditions.
- ❖ Help protect client portfolios during negative as well as positive return markets

MAJOR TOPICS

1. Chronological overview; Concept of Bull Market "Offensive" and Bear Market "Defensive" strategies
2. Macro conditions that indicate bull and bear markets, and the critical importance of studying financial history. A few notes on "Sucker Rallies."
3. In search of honest data: Objective analysis, CPI fudging, and gold throughout history
4. Income investing: Bonds, REITS, utility stocks, and other defensive issues
5. Puts and Calls: An overview only, also places to go for further study
6. Shorting a stock: The good, the bad and the financially awful
7. Financial System Risks: Why gold should be part of almost all portfolios today
8. Conclusions: What kind of markets NOW... and how to play them

PARTICIPANT COMMENTS

"Very good, thought-provoking, and dynamic. One of the few classed that stimulates contrarian thinking and a questioning of excepted capital market norms."

"Very good presentation – informative."

"Informative session. It forced the class to think about investing in a different, but classical way."

"Very good speaker with experience in the topic."

LENGTH	1/2 Day (4hrs)	INSTRUCTOR:	Mike McGowan	PREREQUISITE:	None
CPE CREDIT	4 hours	ADVANCE PREPARATION:	None	LEVEL:	Intermediate

Managing People, Performance and Pressure: A Workshop for CPAs in Industry

If you are like most CPAs, you probably did not receive a substantial amount of training, coaching and mentoring to prepare you to be a first-time manager. And so, you probably did what most managers do when put on the spot: we *improvised* (otherwise known as “trial by fire”, or “on-the-job” training).

As a result, we develop a “management style” or “management modus operandi” that became a habit and dictates all of our future performance. While much of this developed “style” is positive and productive, some aspects are not.

Appropriate for both seasoned and new managers, this one-day workshop will help you evaluate your current management practices and offer new insights and practical tools on how to lower your stress and improve your own and your team’s performance.

OBJECTIVES:

This workshop will enable you to:

- ❖ Evaluate your current “Network of Alliances” and create an action plan to build stronger working relationships with key people.
- ❖ Improve your ability to manage individual and team performance.
- ❖ Increase your emotional intelligence (EQ)

MAJOR TOPICS:

MANAGING PEOPLE

- How to develop and maintain powerful partnerships with employees, peers, and your boss
- How to influence people you don’t manage
- How to become a more emotionally intelligent manager
- How to create an environment where people give, receive and respond to feedback

MANAGING PERFORMANCE

- How to cultivate an environment of ownership and accountability
- How to get people to take responsibility for themselves
- The key to team performance: True Team Alignment
- The five levels of alignment

MANAGING PRESSURE

- How to manage your thinking, attitude, and behavior for optimum success
- Staying calm under fire: how not to react

PARTICIPANT COMMENTS

“Simon does a great job mixing it up and keeps the class moving. Enjoyed small groups.”

“Simon D’Arcy was an awesome speaker. Very engaging with lots of great and useful information.”

“Enjoyed the ability to interact with my counterparts, great ideas, and great presentation.”

“Great course, it was very useful. I learned a lot of things I can take with me on my job and personal life. Course was well paired with lots of good interaction. Very informative and interesting instructor.”

LENGTH	1 Day	INSTRUCTOR:	Simon D’Arcy	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Basic

Getting On Top of It All: The New Science for Increasing Productivity in Yourself and Others

OBJECTIVES:

This workshop will enable you to:

- Get the truly important work done which tends to be put off or never completed
- Handle heavy workloads with greater ease, efficiency, and effort
- Manage yourself and others to stay motivated, focused, and productive over a long period of time
- Take more time to relax since you'll finally be "on top of it all"

MAJOR TOPICS:

- Why important things don't get done on a timely basis, and what to do about it
- Five ways to increase productivity that almost no one ever uses
- The four proven ways to keep yourself and your staff motivated to consistently work at the highest level
- How to avoid feeling stressed out—even though your "to do" list is endless
- The three time management techniques that you're not using that are critical to your success
- How to know and avoid what is a poor use or waste of your time
- How to set goals that excite you, and how to guarantee they actually get done
- Three ways to elicit help from others that ensure their cooperation and help
- The smart things to do with the extra time you'll have when you're on top of it all

PARTICIPANT COMMENTS

"This gentleman is one whose courses I would attend any time they are offered. Bring him back! He should be a retreat!"

"Excellent speaker – amazingly knowledgeable in personal growth."

"Speaker is very effective and believes/lives what he teaches."

LENGTH	1 Day	INSTRUCTOR:	Jonathan Robinson*	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Basic

* **Note** – Jonathan Robinson has a limited numbers of days available for workshops. We may not be able to accommodate all requests for scheduling him.

The Leadership Challenge: Leading Change and Inspiring Others

"Leaders are not born, they are made, and usually self-made."
-- Warren Bennis

Is your team, department or organization going through a period of change or transition? Watch out if you think the answer is "no." Whether obvious or not, change is happening. The only question is: are you leading the way through it?

Whether or not you believe that you possess the qualities of a great leader, this workshop will put you in touch with the core capacities of *leadership* and invite you to take your own next step in leading. This lively one-day workshop will keep you engaged and leave you with new insights and concrete "tools" that you will be able to apply immediately.

OBJECTIVES

This workshop will enable you to:

- ❖ Understand the key leadership capacities that allow you to really BE a leader
- ❖ Inspire yourself to be the type of leader that brings out the best in others
- ❖ Tap into the Discretionary Effort of the people around you
- ❖ Improve your ability to lead others through change

MAJOR TOPICS

- What does it takes to be an effective leader?
- The link between Emotional Intelligence and Leadership
- The leader as a listener: how to listen exquisitely
- Core Values: The blueprint for Authentic Leadership
- Strategies for stimulating initiative toward company goals
- The difference between managing and leading
- The four stages of accepting change
- How to manage leadership transitions

PARTICIPANT COMMENTS

"An absolutely essential class!"

"This was a fabulous seminar. I will try to attend one of his seminars at least once a year."

"Excellent balance of theory and instruction, accompanied by practical issues."

"Great class, heavy interaction and very applicable to my career."

LENGTH	1 Day	INSTRUCTOR:	Simon D'Arcy	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Basic

TIME MASTERY FOR CPAS

Over 100 Ways to Maximize Your Productivity and Satisfaction

NOTE: You can now also offer this workshop as a **telephone seminar**. Please see the last page of this catalog for details.

OBJECTIVES:

This workshop will enable you to:

- Eliminate time stress
- Get over 100 practical ideas – at least one has to apply to you!
- Create a balance between your work life and personal life
- Work with greater productivity and satisfaction

AGENDA

1. Become accountable for your time
 - Understand where your time goes
 - Where do you want it to go?
 2. Create positive attitudes for peace of mind
 - Never again say, "I don't have enough time"
 3. Work on what counts rather than what comes up
 - The Doing/Managing ratio
 - Fire clients
 - Control where your time goes
 - Increase income while decreasing hours
 4. Delegate – You can do it!
 - Overcome barriers to delegating
 - Your secretary as assistant
 - Using time-saving technology
 5. Plan your life
 - Work to live instead of living to work
 6. Plan your work
 - Set and stick to priorities
 - Set yearly goals
 - Reduce your work hours: The "Cold Turkey" method
 - Long range planning
 7. Work your plan: Control interruptions
 - Be the master of technology, not the slave
 - Balance being available with getting your planned work done
 - Take a Priority Hour
 8. Manage the phone
 - Delegate phone management
 - Set phone appointments
 - Get out of cell hell
 9. Get out of E-mail jail
 - The 12 best e-mail practices
 10. Get and stay in control of your work
 - Using a simple task management system
 - Daily Planning
 - How to not let anything slip through the cracks
 11. Go home satisfied every day
- (Continued)

TIME MASTERY FOR CPAS

Over 100 Ways to Maximize Your Productivity and Satisfaction (Continued)

- 12. Communicate proactively with clients and in the office
- 13. Eliminate time waste in meetings
- 14. Get and stay organized
 - Orderly file processing
 - Clear up your piles
 - Overcome indecision: The 3 Minute Rule
 - Handle paper and mail efficiently
- 15. Handle anxiety
 - The anatomy of anxiety
 - Get control over anxiety
 - How to complete everything
- 16. Stop procrastinating
 - The Worst First method
 - The Bite the Bullet day
- 17. Get things done
 - Tackle the “some day,” soft deadline” or tedious projects
 - The 15 Minute Rule
- 18. Pause for perspective, creativity and well-being
 - Creating creative time
 - The "Do What I Like" Day
 - Take a vacation
- 19. Foster better time management for the whole office
- 20. Convert intentions into action
 - The Buddy System

PARTICIPANT COMMENTS

“This man is so good that it is scary. He has one of the best presentations that I have ever attended. “

“Good practical ideas for tackling the tasks that keep me from enjoying my days. I am excited about putting this into effect immediately.”

“It is all less random. It can be more fun by being more disciplined.”

“It can be done – an organized, satisfying life.”

“I have been stuck and now can get unstuck.”

LENGTH	1 Day	INSTRUCTOR:	Frank Sanitate or Simon D'Arcy	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Basic

NOTE – This workshop is available as a telephone seminar

For more information and to register, please check out our teleseminar website: www.QualityTimePros.com.

The Speed of Life: How to Slow Down, Produce More and Serve Clients Better

Has technology simplified your life? We are living in the richest, most powerful country on the planet and in history; are you enjoying it? Do you go somewhere quickly so you can go somewhere else quickly?

This workshop helps CPAs to slow down the speed of life – and produce more at the same time.

OBJECTIVES

This workshop will enable you to:

- ❖ Slow down by taking charge
- ❖ Produce more by working smarter
- ❖ Get greater job satisfaction while serving clients better

MAJOR TOPICS

- Understanding your culture
- Getting real about billable hours
- Has technology simplified your life?
- How to get back into focus
- Figuring out what's important
- How the rule of three can save your life
- How to get what's important done each day
- The five techniques for controlling your day
- The fundamentals of problem-solving
- Fantasizing your way to what's really important

PARTICIPANT COMMENTS

“Good job, you made eight hours go by quickly. Much better than anticipated, thank you!”

“The speaker was excellent and very effective and I would definitely recommend him to others and attend his courses again.”

“Frank did a wonderful job – enjoyed this class immensely.”

LENGTH	1 Day	INSTRUCTOR:	Frank Sanitate	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Basic

Ten Trends That Will Affect Your Future -- and How to Benefit From Them Now

OBJECTIVES:

This workshop will enable you to:

- Avoid being blindsided by trends that could change your career and finances overnight
- Understand how technology dramatically alters the best ways to make money, manage people, and become more productive
- Be well positioned and prepared to “ride” the latest trends into a more profitable business and higher quality lifestyle

MAJOR TOPICS:

- How exponential technological growth affects your business and your life
- How to take advantage of outsourcing to increase your revenue
- The three new marketing trends that you need to know about before it's too late
- Two ways to increase customer and employee loyalty and ensure referrals
- What to do today to make sure you're on the cutting edge of accounting tomorrow
- How to use the latest “best practices” for increasing productivity and success
- Three ways to differentiate yourself from your competition by using superior technology
- How to be psychologically prepared for the major changes ahead

PARTICIPANT COMMENTS

“My favorite CPE instructor.”

“Very motivating and thought provoking person.”

“Mr. Robinson was a great speaker. He kept my interest for the entire class. I would enjoy attending another one of his classes.”

“I definitely plan to sign-up for all future classes where Jonathan is the featured speaker!”

LENGTH	1 Day	INSTRUCTOR:	Jonathan Robinson*	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Basic

* **Note** – Jonathan Robinson has a limited numbers of days available for workshops. We may not be able to accommodate all requests for scheduling him.

Achieving Balance In Work And Life

Due to the constant stress of a fast paced life, overwork, and family demands, it's easy to feel one's life is out of balance. When this happens, all areas of your life can suffer. By learning key methods for setting priorities and goals, overcoming stress, and deciding what's most important to you, you can achieve new levels of balance and greater results. Having more balance in your life will allow you to do less of what you don't want and more of what is truly important to you.

OBJECTIVES

This workshop will enable you to:

- ❖ Understand and achieve your real priorities – in work and life
- ❖ Increase relaxation without decreasing productivity
- ❖ Create excellence in your work and life
- ❖ Learn how to change behaviors that no longer serve you

MAJOR TOPICS

Exploring Balance

1. How modern day life pulls people off balance, and how you can compensate.
2. Why people get burned out, and how you can avoid it.
3. How to overcome excuses that lead us to get out of balance
4. The three skills you need to learn to enjoy long term balance.

Knowing What's Important

1. How to know what is really important to you, versus what your boss or parents tell you is important.
2. How to set goals in work and life and to ensure your progress.
3. How to make sure what your priorities are and how to stick to them
4. How to say no to things that draw your life out of balance.

Creating Excellence

1. The three keys to going beyond mediocrity and into excellence.
2. How to stay consistently motivated over a long period of time.
3. The three things that get in the way of excellence, and how to avoid them.
4. How to inspire your co-workers, friends, and family towards excellence.

PARTICIPANT COMMENTS

“Great class. Learned a lot and was interested in what the leader had to say. Had the audience fully engaged the entire day! A+!”

“Real eye-opener and techniques are such that we can apply them to our daily lives – not feel overwhelmed by them.”

“Great tips – really helpful. I am making a contract to experiment with your strategies. Thank you!”

“Speaker was great. Made topic very interesting. I am leaving class today with principles I can apply to my life.”

LENGTH	1 Day	INSTRUCTOR:	Jonathan Robinson*	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Basic

* **Note** – Jonathan Robinson has a limited numbers of days available for workshops. We may not be able to accommodate all requests for scheduling him.

Building A Successful Retirement In Spite Of No Time, No Money And Almost No Planning (1/2 day)

What does retirement "success" in America look like? Is it mere idleness? Projects? Part-time work? Clients spend more time planning a vacation than they do planning how they'll spend the non-working *decades* of their lives. Assuming that a majority of our "Boomer" population will one day have their basic economic needs met, this workshop presents and analyzes retirement as a "balanced diet."

Retirement is like anything else. You've gotta start preparing for it when you're young.
-- Fred Astaire

OBJECTIVES

This workshop will enable you to:

- ❖ Understand the financial and psychological issues of retirement
- ❖ Better communicate with your clients about retirement
- ❖ Build your practice among the soon-to-be and the already retired

MAJOR TOPICS

Information and exercises to help you and your clients develop a balanced "Retirement Plan" covering the following areas of life.

- PHYSICAL:
 - Diet, exercise, time and health issues
 - Home and neighborhood environment; safety issues
- MENTAL:
 - "Intellectual" activities, education, and/or a transition job
 - Handling and/or delegating money matters
- EMOTIONAL:
 - Love and family; gender differences
 - Connecting socially with a "community"
 - Recreation, entertainment and hobbies
- SPIRITUAL:
 - Spirituality and philosophy; politics?
 - Philanthropy, art, music, and creativity

PARTICIPANT COMMENTS

"Lots of good information on energy for the future."

"Excellent speaker. Very thought provoking."

"Was not what I expected but was more of what I needed."

"Food for thought! An important first step!"

LENGTH	1/2 Day (4hrs)	INSTRUCTOR:	Mike McGowan	PREREQUISITE:	None
CPE CREDIT	4 hours	ADVANCE PREPARATION:	None	LEVEL:	Intermediate

Problem Solving and Creative Thinking

Everyone has creative capacity. Few of us study how to use it more fully. This workshop will help you tap into your ability to break out of old paradigms - old ways of thinking - to create powerful ways of thinking and problem-solving.

Problem Solving and Creative Thinking

A CPA's most critical skill is your ability to solve problems - both for clients and for yourself. Understanding the root of problems and the techniques to resolve them is a learnable skill. This workshop will help you tap into your ability to break out of old paradigms - old ways of thinking - to create powerful ways of thinking and problem-solving.

OBJECTIVES

This workshop will enable you to:

- ❖ Think more clearly for yourself and your clients
- ❖ Help clients and staff solve problems more effectively
- ❖ Learn 4 techniques to resolve difficult problems
- ❖ Learn 3 break-through techniques to communicate more effectively

MAJOR TOPICS

1. What is reality?

- Paradigms: How we get "boxed in" in our thinking
- Where did the box come from?
- The creative process – how to get out of the box

2. What is a problem?

- The three resolutions to all work problems
- The three resolutions to all problems
- Making difficult decisions

3. Four techniques to resolve difficult issues

1. Identify the critical element
2. Write, engaging both sides of the brain
3. Challenge the assumptions
4. Shift the paradigm

4. Creativity

- Creativity for CPAs
- Creating the ideal workplace

5. Resolving communications problems

- Resolving conflicts through listening
- Three break-through techniques for counseling and conflict resolution

PARTICIPANT COMMENTS

"A change of pace course - emphasizes the "soft skills" which are not being recognized as important as well as technical ability."

"This course exceeded my expectations, Frank was not just a motivational speaker but presented useful & practical ways to approach problems. He didn't try to solve problems but offered ways to solve them."

"A really pleasant surprise! "

LENGTH	1 Day	INSTRUCTOR:	Frank Sanitate	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Basic

Triple Your Memory and Confidence, and Halve Your Stress

CPAs are no longer just "bean counters." In order to be successful, they have to be able to learn faster, feel confident working in difficult situations, and overcome stress efficiently and effectively. Fortunately, each of these skills can be quickly learned in a single day.

Using the latest "inner technology," participants will be guided in powerful and practical ways to triple their reading and memorization ability, become immediately confident, and let go of stress in as little as six seconds.

OBJECTIVES

In this one day, fast paced and fun workshop, you will learn:

- ❖ How to memorize names and faces more effectively.
- ❖ How to memorize reading material, facts, and even numbers 300% more efficiently than before.
- ❖ How to "turn on" confidence at will, even in stressful situations.
- ❖ How to overcome fears and limiting thoughts that keep you from succeeding.
- ❖ How to interrupt stress from building up in your body, and how to let go of it once it occurs.

MAJOR TOPICS

- Why the brain can remember some things a hundred times better than others.
- Why we typically forget names and faces, and what can be done about it.
- How our emotions follow the motion of our body, and how that can be used to instill instant confidence.
- How to tap into a completely relaxed and/or confident state of mind in 10 seconds or less using advanced hypnotic conditioning and Neuro-Linguistic Programming techniques.
- How to stay motivated to use the methods outlined in this course to advance your career and achieve a higher quality of life.
- How to use the concept of constant learning to help you maintain a balanced and fulfilling lifestyle.

PARTICIPANT COMMENTS

"This class may be the turning point for making major changes in my career. Excellent! All CPAs need to take this class."

"Most relaxing CPE class ever. Great stress relievers, and I also discovered a letter long overdue to be written. I am also hoping to remember some of my newly learned memory skills!"

"Very practical and applicable information. Highly recommend this course!"

LENGTH	1 Day	INSTRUCTOR:	Jonathan Robinson*	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Basic

* **Note** – Jonathan Robinson has a limited numbers of days available for workshops. We may not be able to accommodate all requests for scheduling him.

Shortcuts To Success: The 14 Best Tools For Personal And Professional Growth

Professionals have work years to develop techniques and practices that are most effective in helping people to succeed both in business and personal life. This workshop distills 14 of those techniques which participants begin to practice immediately.

OBJECTIVES

- ❖ Communicate effectively with anyone-even difficult people
- ❖ Relax instantly and avoid burnout
- ❖ Stay motivated on your job, week after week
- ❖ Tap into your creativity and intuition as a way to create even more success
- ❖ Manifest whatever goal you have at an accelerated rate
- ❖ Easily overcome your personal or professional fears, such as public speaking, fear of failure, etc.

MAJOR TOPICS

1. What really leads to success in the modern world
 - The five things that correlate with fulfillment
 - The five skills that lead to personal success
 - Why "inner technology" is so important to succeed.
2. Mastering the Art of Communication
 - Why communication is so important
 - The five mistakes people often make when they communicate
 - How to solve problems without bruising egos
 - How to get people to want to work with you
3. The Magic of Motivation:
 - The key to success is consistency
 - Why people normally don't stay motivated, and how to overcome this
 - Why procrastination is a problem, and how it can be easily handled
 - How to motivate other people
4. Overcoming Your Fears
 - Why people have fears, and how they can be overcome
 - The three skills needed to overcome any fear
 - Identifying the fears that stop you, and creating a plan for their destruction
5. Turbo Charging Your Goals
 - Why goals are important
 - The 12 common errors people make when going for a goal
 - Creating a goal plan that is practically guaranteed to succeed.
 - Creating balanced goals that lead to fulfillment.

PARTICIPANT COMMENTS

"Excellent! Most useful non-technical course I have ever attended."

"Jonathan is an excellent presenter - stories are very relevant. Most interesting CPE this cycle."

"Such useful techniques. Great seminar!"

LENGTH	1 Day	INSTRUCTOR:	Jonathan Robinson*	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Basic

* **Note** – Jonathan Robinson has a limited numbers of days available for workshops. We may not be able to accommodate all requests for scheduling him.

Don't Go To Work Unless It's Fun!

How CPAs Can Become Happier and More Productive

How often do you say, "I can't wait to get to work?" Usually it is the other way around. Yet there are very specific actions you can take and attitudes that can be formed so that you can greatly enhance your enjoyment at work. Increased productivity is a by-product as well. Learn to create an organization where everyone looks forward to coming to work every day!

OBJECTIVES This workshop will enable you to:

- ❖ Understand and overcome the barriers to fully enjoying your work
- ❖ Become more productive in your work
- ❖ Create an organization where everyone looks forward to coming to work every day
- ❖ Have fun

MAJOR TOPICS

- How To Change the Negatives about Work
- The Seven Work Miracles
- How to Change Your Life
- Moving From "Victim" To "Master" Mentality
- Creating The Path To Having Work Be Fun
- How to Deal with Not Enough Time
- Become Technology's Master, Not Its Servant
- The Uses Of Fantasy: What Do You Want To Be When You Grow Up?
- The Nobility Of CPAs
- The Five Satisfaction Principles
- How To Get What You Want: Creating Clear Communication
- How To Say "No"
- Three Simple Staff Motivation Techniques
- Creating a "Satisfaction Policy"

PARTICIPANT COMMENTS

"Makes me step back to think/consider what and why I do what I do and whether I want to change."

"Very informative session."

"Course content was a challenge to address workplace/life issues that create dissatisfaction and to implement actions. Aimed at dealing with these issues – a day well spent."

LENGTH	1 Day	INSTRUCTOR:	Frank Sanitate or Simon D'Arcy	PREREQUISITE:	None
CPE CREDIT	8 hours	ADVANCE PREPARATION:	None	LEVEL:	Basic

ABOUT OUR INSTRUCTORS

FRANK SANITATE

Frank Sanitate is president of Frank Sanitate Associates, which he established in 1977. He and his firm develop and present transformational workshops for professionals. He has conducted his workshops in every state in the U.S. and every province in Canada -- teaching tens of thousands of CPAs and other professionals.

He has published *Don't Go To Work Unless It's Fun: State-of-the-Heart Time Management* and also *Beyond Organized Religion; An Ex-Monk Revisits Life's Basic Questions*. He was previously a manager at AICPA. He graduated from Catholic University of America, Cum Laude, with a BA in English. He has an MBA from Florida Atlantic University.

SIMON D'ARCY

Simon D'Arcy is a Senior Associate with Frank Sanitate Associates. Since 1989 he has motivated thousands of CPAs and other professionals to achieve greater personal and professional success. He has developed and delivered cutting edge training programs that emphasize leadership, interpersonal communication, corporate culture change, teamwork, and personal accountability to improve individual and organizational performance and profitability. He travels internationally, working with Fortune 500 companies and speaking to executives, managers, and employees from such prominent corporations as ARCO, BankOne, BellSouth, CIBA Vision, Merrill Lynch, and UPS. He has worked with over 20 state and provincial professional associations the U.S. and in Canada. He has a BA from UC- Santa Barbara.

ARTHUR GROSS SCHAEFER, CPA, JD, MHL, Rabbi

Arthur Gross Schaefer is an Associate with Frank Sanitate Associates. He is a CPA, an attorney, a Professor, and a Rabbi. He has been a professor of business law and ethics at Loyola Marymount University for the past twenty-three years and is currently the chair of the department. He has received numerous teaching awards and was recently honored as professor of the year for the university. He has written and spoken extensively in areas of ethics (personal, professional, business, legal, medical, profit and non-profit organizations), conflict resolution, diversity, labor law, sexual harassment and issues of separation of church and state.

SEAN MASON, JD

Sean Mason, JD, is an Associate with Frank Sanitate Associates. As an executive coach and trainer, Sean has coached and led leadership, team alignment sessions and negotiations programs for thousands of executive, managers, and employees in companies such as, Placer Dome, Sun Microsystems, CNA Insurance, Zurich North America, Lockheed Martin, GlaxoSmithKline, Roche, Amgen, and Genetech. As a master mediator, Sean's focus is primarily on finding ways to bridge the gap between interests that seem incompatible, creating alignment where none existed before. At the heart of his work is the Core Values Methodology he created and developed over the past 10 years. Sean holds a Juris Doctorate from Whittier Law School and a Bachelor of Fine Arts from University of California at Santa Barbara. He is currently writing a book on personal and leadership development based on a core values methodology he designed and has implemented over the past five years.

MICHAEL MCGOWAN, JD, CFP

Michael McGowan, JD, CFP, is an Associate with Frank Sanitate Associates. He has been a stockbroker, lawyer and a trust department portfolio manager whose portfolio responsibilities exceeded \$145 million. He has chaired arbitrations for the National Association of Securities Dealers (NASD) since 1988. He also has written Personal Finance columns for the ABA Journal. Mike brings with him over 25 years of investment business experience.

JONATHAN ROBINSON

Jonathan Robinson is an Associate with Frank Sanitate Associates. He is a psychotherapist, author, and professional speaker from Santa Barbara, California. Jonathan has reached over a million people around the world with his practical methods, and his work has been translated into 47 languages. Mr. Robinson has appeared on the Oprah Winfrey and other TV talk shows, CNN, and CNBC. Among his books are: *Shortcuts to Bliss*, *Instant Insight: 200 Ways to Create the Life You Really Want* and *Communication Miracles for Couples*. His specialty is teaching people simple techniques that can have a profound impact on the quality of their life. He has an M.A. and an M.F.C.C.

JORGE RUBIO-VOLLERT

Jorge Rubio-Vollert is an Associate with Frank Sanitate Associates. He is a Certified Nonviolent Communication Trainer and Director of the Latin American Project of the Center for Nonviolent Communication. He has extensive international experience as workshop facilitator and mediator for businesses, government institutions and individuals in the United States, Colombia and Sweden.

TABLE OF CONTENTS BY INSTRUCTOR

SIMON D'ARCY	PAGE
Don't Go to Work Unless It's Fun! How CPAs Can Become Happier and More Productive	22
Getting Through To People: Leading Edge Communication Skills For CPAs	3
The Leadership Challenge: Leading Change and Inspiring Others	12
Managing People, Performance and Pressure: A Workshop for CPAs in Industry	10
Time Mastery for CPAs: Over 100 Ways to Maximize Your Productivity and Satisfaction.....	13-14
 ARTHUR GROSS SCHAEFER, CPA, JD, MHL, Rabbi	
How to Be Seriously Ethical and an Effective CPA: Finding Renewed Meaning in the Practice of Accounting	5
 SEAN MASON	
Getting Through To People: Leading Edge Communication Skills For CPAs	3
 MICHAEL MCGOWAN	
Building A Successful Retirement in Spite of No Time, No Money and Almost No Planning (1/2 day)	18
Current Issues in Pension Investing – Including the Pension Protection Act (PPA) of 2006 (1/2 day)	8
Investment Strategies for Uncertain Times (1/2 day)	9
Securities Investing Today: Managing Assets for your Clients, Your Firm and Yourself	6-7
 JONATHAN ROBINSON	
Achieving Balance in Work and Life	17
Shortcuts to Success: The 14 Best Tools for Personal and Professional Growth	21
Triple Your Memory and Confidence, and Halve Your Stress	20
Getting On Top of It All: The New Science of Increasing Productivity in Yourself and Others.....	11
Ten Trends that Will Affect Your Future – and How to Benefit from Them Now	16
 JORGE RUBIO-VOLLERT	
Conflict Resolution: How to Move from Adversarial to Amicable Outcomes in Any Communication	2
 FRANK SANITATE	
Problem Solving and Creative Thinking	19
Don't Go to Work Unless It's Fun! How CPAs Can Become Happier and More Productive	22
Effective Writing for CPAs: Simplify the Process; Simplify the Product; Manage Email	4
The Speed of Life: How to Slow Down, Produce More and Serve Clients Better	15
Time Mastery for CPAs: Over 100 Ways to Maximize Your Productivity and Satisfaction.....	13-14