



Your Change Accountants Open Day

Location:

Change Accountants & Advisors

Level 13 40 Creek Street
Brisbane, Queensland 4001
Australia

The Purpose of the Open Day

We will give you our time for the day and you'll walk away with hundreds of ideas and the inspirations to take your firm to the cloud.

It's a chance for us to showcase industry leading Technology, Systems, and Mindset that we will be using to help our clients live the lifestyle they want!

We are confident that by the end of the day you will have done your due diligence on both CountGPS Content and or Practice Manager and be ready to subscribe on the day.

To help you with this decision making process just call our team on 1300CountGPS to start the simple 3 Step evaluation process in lead up to the day.

And the cost?

The only cost to you is your travel & accommodation arrangements, your lunch (and if you're feeling generous, our lunch) .. and we'll make the day as beneficial & memorable as we possibly can!

The flexible schedule

8:45am Registration and coffee from our own in house barista

9.00am Introduction and Greeting

Harvee Pene - Don't Fear Change – finally some honest and proven guidance in achieving positive change in your.. Life.. Team.. Clients.. Business.

9.30am Timothy Munro - CloudPlan – Your Firm 100% in the cloud. Leverage from our due diligence.

- XERO
- Acclipse iFirm
- CountGPS Content
- Online Tax
- Class Super
- Office 365

How Acclipse iFirm helps us manage multiple jobs across multiple teams for one client.

Terms of Engagement and Fixed Price Agreements – How to set up the game of play from day 1 so that you are in control and the clients love you more as a result

- Why all clients deserve upfront quotes?
- How to use iFirm to quote, collect and manage upfront quotes and fixed price agreements
- How to get your clients on Fixed Price Agreements
- Case studies on using XERO as a basis for Fixed Price Accounting.

XERO Online Accounting and Partner add on's.

- Client case studies on how Change uses XERO, Vend, Workflowmax, Paycycle, Unleashed, Capsule & Spotlight reporting

10:30am Harvee Pene - Business Structure Advice – Statements of Advice in 5 minutes & what every adviser needs to do next

- Online Document's
- Why we as accountants need to gang up on our clients.

LifePlan – 10 Year Goal setting sessions to help clients achieve their lifestyle goals

- Why you need to focus on strategy, not products.

- Delivery of LifePlans through your Accounting team

Succession Planning – Introducing the Future Partners program, providing non-technical career development to your GenY team

11.40pm Tour of the Change Accountants Office.

12.00pm Networking and steak lunch at one of Brisbane's best Steak Restaurants Cha Cha Char

Please note as previously mentioned, there is no cost for this event. The only cost to you is your meal (there's that generous feeling again!), travel and accommodation.

1.30 – 2.00pm Review of must use apps on the iPad

- *Evernote – online notebook*
- *Signmypad – Sign ITRs on the iPad*
- *Xero – Online Accounting App*
- *Lastpass – App for remembering all your passwords*
- *Zite – Collate social media streams*
- *Bump – Share iPhone data instantly*
- *Tweetdeck – Social Media feed*

2.30pm Change Open Day Feedback and testimonials.

2.45pm Pay for lunch at reception.

Your time to split up and speak to our team or representatives to answer any outstanding questions you might have.

3:00pm Finish