

# IAPA USA Regional Conference Fontainebleau Beach Hotel, Miami 2017

**Welcome**  
Saturday 20 May



# IAPA-The future



Martin Clapson

IAPA Global Vice-Chairman

**Not** CEO nor Global Chairman

# IAPA Growth: The last 12 months

## **EMEA**

- Spira, Twist & Associates, France
- Acconsis, Germany
- BONJOUR Audit, Hungary
- Vulpoi & Toader Management, Romania
- MENA Audit & Advisory, Tunisia
- Baraki Chartered Accountants, Saudi Arabia
- Ibrahim Alaziq, Saudi Arabia

## **Latin America**

- Landa Auditores SpA, Chile



## **Asia Pacific**

- Yong Tan & Co, Malaysia
- SWT Associates, Sri Lanka
- Muhammad Shadeedullah & Co, Bangladesh

*Losses: Argentina, Australia, UK, USA, The Netherlands, Poland, Germany, Belgium, S.Africa*

*Expulsions: Gibraltar, Iran, Turkey, Uzbekistan*



# IAPA Growth: The last 12 months

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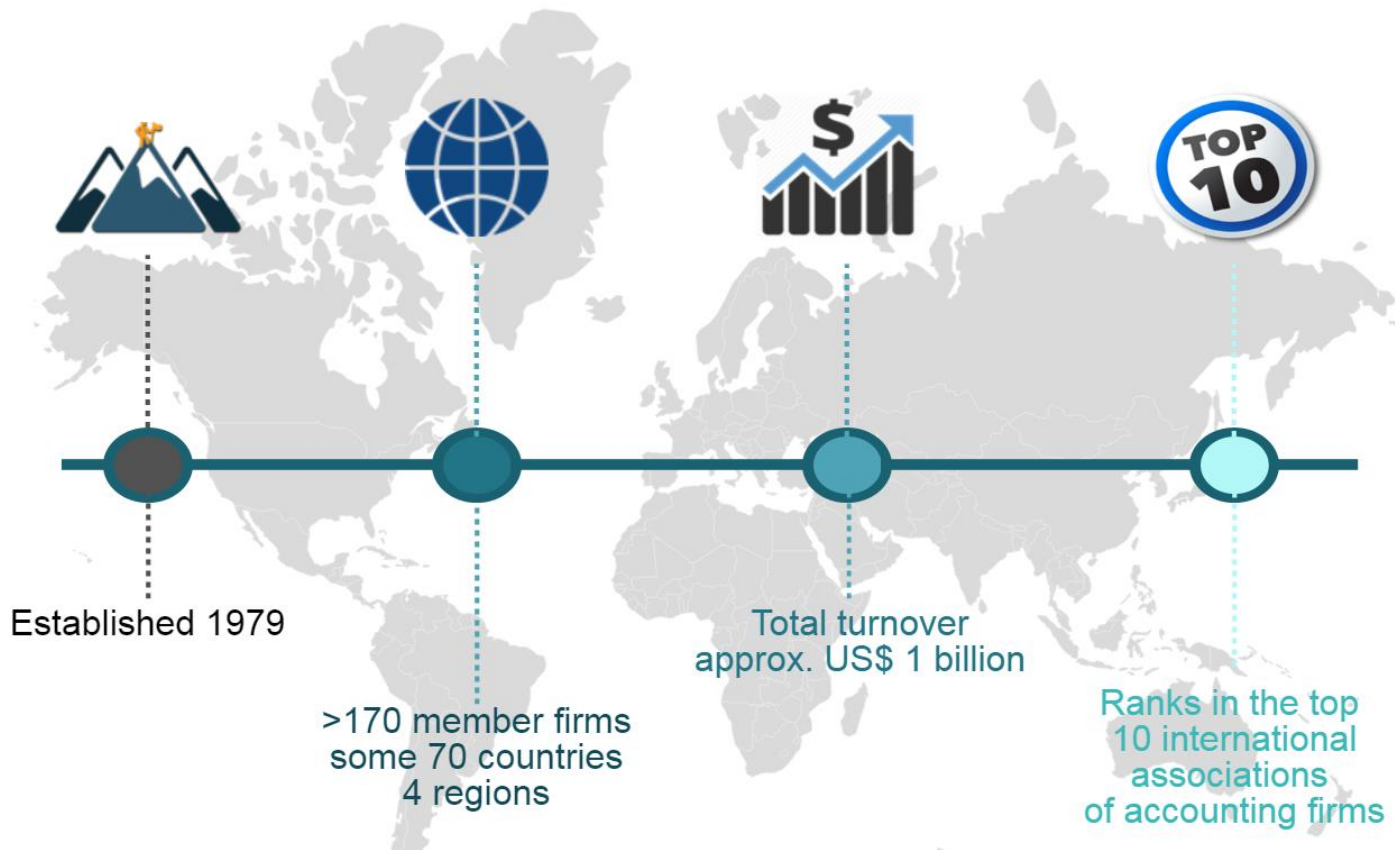
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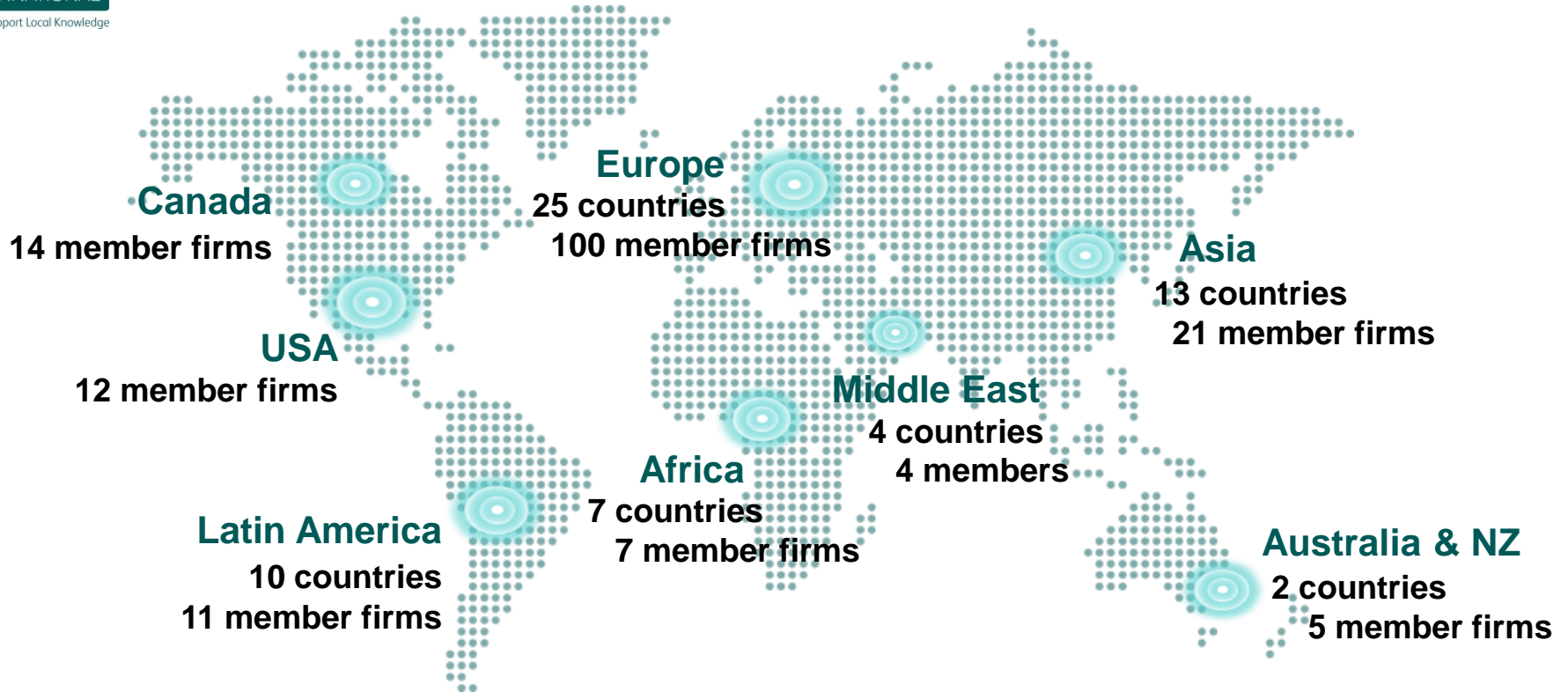
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# IAPA – a quick reminder







# IAPA statistics – US Region

Date: May 2017

## USA

### 12 member firms, 1 Affiliate member:

- AAFCPAs, Massachusetts
- Berkower LLC, Los Angeles & New Jersey
- Gerson, Preston, Klein, Lips, Eisenberg & Gelber, Florida
- Getzel Schiff & Pesce, New York
- Levitzacks CPA, San Diego
- Maginnis Knechtel & McIntyre, Los Angeles
- Price Bailey (St Lucia) Inc., Saint Lucia
- RRB Business Services, Atlanta
- Schulman Lobel, New Jersey & New York
- Steven Bankler, Steven Bankler CPA, San Antonio
- Vine Dahlen, Seattle
- Zwick & Banyai, Michigan
- Wilson Elser, New York (Law Firm, Affiliate member)

## Canada

### 14 member firms:

- Benoit, McGraw & Paulin CPSs, New Brunswick
- Buchanan Barry , Calgary
- Choquette Corriveau, Quebec City, Quebec
- D&H Group, Vancouver
- Hilborn LLP, Toronto, Ontario
- Hyatt Lassaline, Windsor, Ontario
- Lacharite McComber Kuczynski, Montreal, Quebec
- Marcil Lavallee, Ottawa, Ontario
- Millard, DesLauriers & Shoemaker, Toronto, Ontario
- Nadeau Picard et Associes, New Brunswick
- PKBW Group, Winnipeg, Manitoba
- Thomson Jaspar & Associates, Saskatoon
- Yaremchuk & Annicchiarico, Edmonton
- Vine & Partners, Hamilton, Ontario



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- Wilson Elser, New York (Law Firm, Affiliate member)
- **Jim Mulroy, New Jersey (April 2017)**
- **Thompson Kessler (June 2016)**
- **KWCO (June 2016)**

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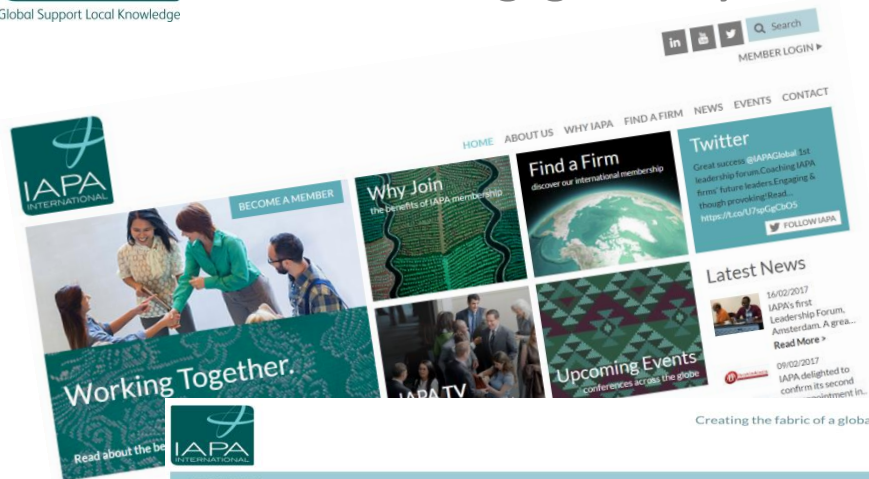
# IAPA statistics – US Region

Date: May 2017



# IAPA – NEW marketing initiatives *connecting globally*

Global Support Local Knowledge



Creating the fabric of a global society

## MARKETING PACK

### NEWSLETTER

203 member firms

The IAPA quarterly newsletter is an excellent opportunity for members to share news about their firms or particular insights into service sectors or industry niches. This provides an opportunity for member firms to raise their profile within the association and increase chances of referral work. Please do send through any articles or updates to the Centre and we will include these in subsequent publications. Previous editions can be found [HERE](#).

### KEY STATISTICS

- One of the Top 10 global associations
- Over 200 member firms, covering 300 offices, in some 70 countries worldwide
- Almost 40 years in operation
- Turnover of members of over USD 1.1bn

### CASE STUDIES AND MEMBER TESTIMONIALS

Examples of how IAPA member firms have worked together to assist clients with their global business can be found [HERE](#). These may be particularly useful when pitching for new work.

### OUR ONLINE COMMUNITY

We are active on [Twitter](#), [LinkedIn](#) and [YouTube](#).

### BROCHURE

We have produced a short e-brochure that can be sent to your clients to explain your offering as a member of IAPA International. This can be found [HERE](#).

### PRESENTATIONS

We have provided PowerPoint slides for inclusion where relevant in your presentations to promote your membership of IAPA International. These can be found [HERE](#).

### PROMOTING IAPA ON YOUR WEBSITE

As a member, it would be advantageous to both the association and to your firm for you to have on your website:

- The IAPA logo
- Some text about the association:

*IAPA International is one of the Top 10 global accounting associations and represents the combined strength of over 200*

### PUBLIC RELATIONS

If you are speaking to journalists, please mention your membership of IAPA International. Remember to include it in any information you provide with press releases.

If your firm gets any coverage in the press, please let us know so that we can promote this on the IAPA website and social media.

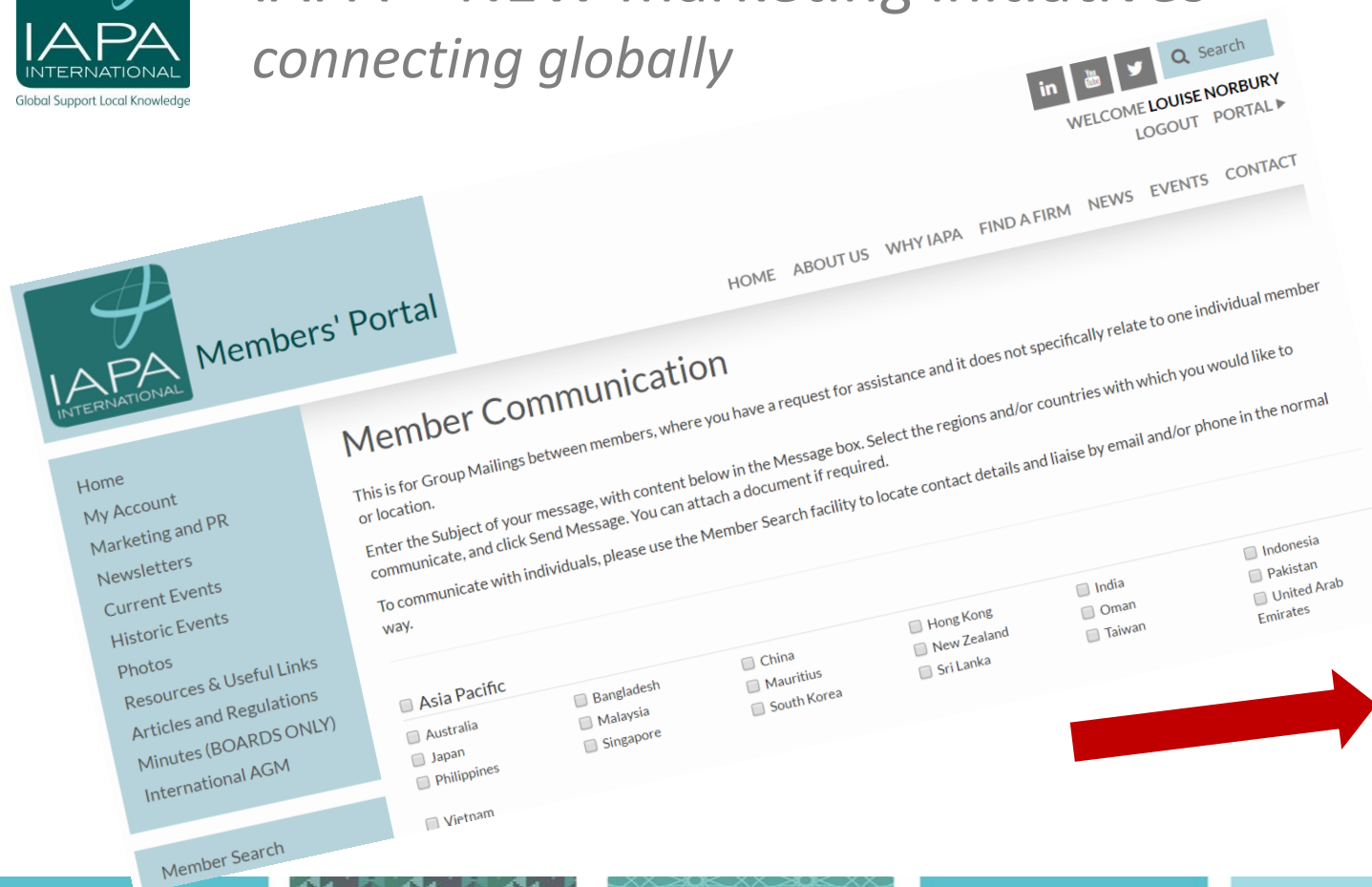
If you have any press releases that you would like distributed to relevant media outlets, please email these to [Stephen Hamlet](#).

Find out more about IAPA conferences/ events  
Watch IAPA TV:



# IAPA – NEW marketing initiatives

## *connecting globally*



**Members' Portal**

- Home
- My Account
- Marketing and PR
- Newsletters
- Current Events
- Historic Events
- Photos
- Resources & Useful Links
- Articles and Regulations
- Minutes (BOARDS ONLY)
- International AGM
- Member Search

HOME ABOUT US WHY IAPA FIND A FIRM NEWS EVENTS CONTACT

WELCOME LOUISE NORBURY  
LOGOUT PORTAL ▶

### Member Communication

This is for Group Mailings between members, where you have a request for assistance and it does not specifically relate to one individual member or location.

Enter the Subject of your message, with content below in the Message box. Select the regions and/or countries with which you would like to communicate, and click Send Message. You can attach a document if required.

To communicate with individuals, please use the Member Search facility to locate contact details and liaise by email and/or phone in the normal way.

- Asia Pacific
- Australia
- Japan
- Philippines
- Vietnam
- Bangladesh
- Malaysia
- Singapore
- China
- Mauritius
- South Korea
- Hong Kong
- New Zealand
- Sri Lanka
- India
- Oman
- Taiwan
- Indonesia
- Pakistan
- United Arab Emirates

- Home
- My Account
- Marketing and PR
- Newsletters
- Current Events
- Historic Events
- Photos
- Resources & Useful Links
- Articles and Regulations
- Minutes (BOARDS ONLY)
- International AGM
- Member Search
- Member Directory (PDF)
- Member Communication
- Online Payment Facility



## IAPA – the benefits

- IAPA is a member-led association
- Like minded, independent firms
- One member, one vote
- An entrepreneurial spirit
  
- Truly international network
- Connected face to face at regional and global events
- Sharing of technical knowledge / best practice
  
- Offers quality, timely solutions for your global business needs



## Ambitions for IAPA in 5 years' time:

- increased business opportunities
- new members
- more evenly represented globally
- increase interaction amongst members



# Membership online survey



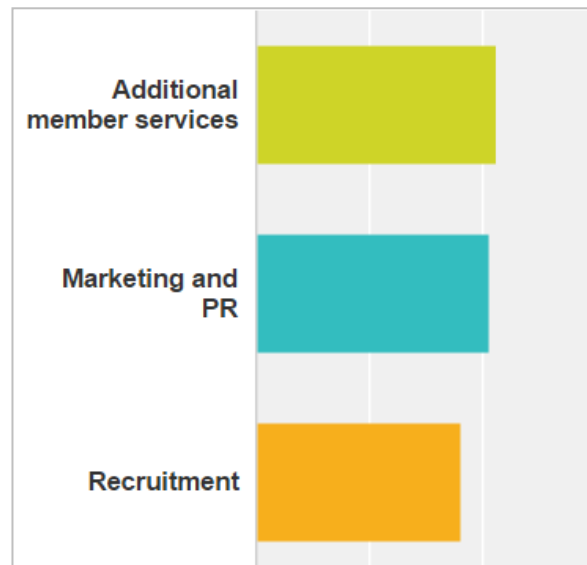
- Survey sent to 136 member firms
- 69 replied
- Across all 4 regions
- Summary of results sent to all contact and branch partners 18 April

# Membership survey results

almost  
 $\frac{2}{3}$

**64%** feel you get value for money for your IAPA membership dues

In order of priority, what would you like the extra dues' revenue to be spent on?



# Preference for additional member services

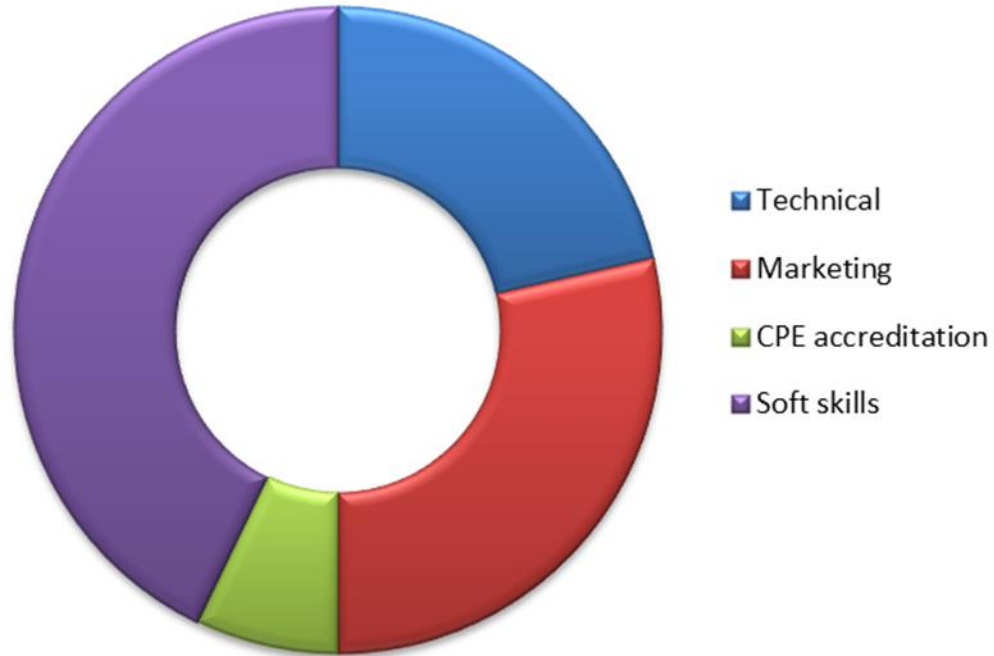
What we can do:	What we can't do:
Webinars	IAPA structured Audit manual
Regular tax bulletins	IAPA structured AML manual
Doing business abroad	New audit techniques
More regional one day meetings	General technical support
Interactive map of business transactions between members	
List of member services	





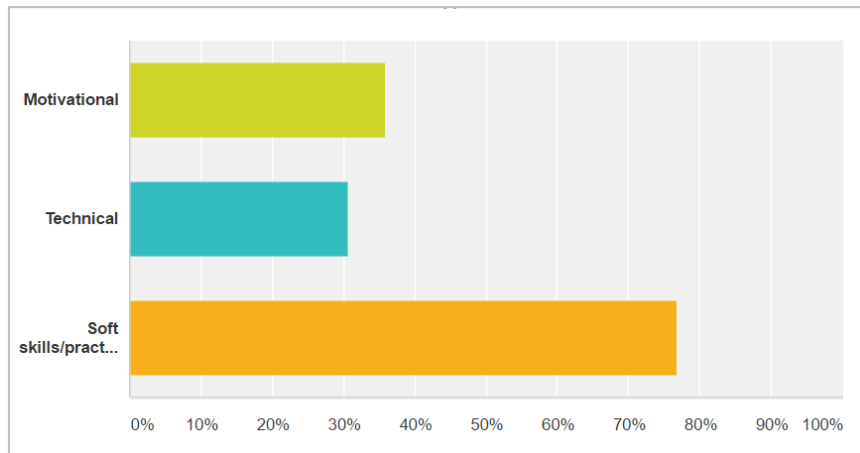
# Preference for more member services

## Webinars:

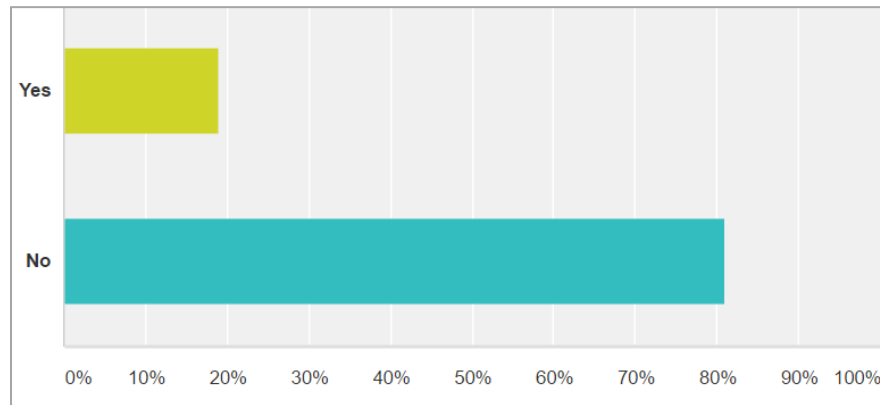


# Membership survey results

If you want more external speakers at conferences, which topics?

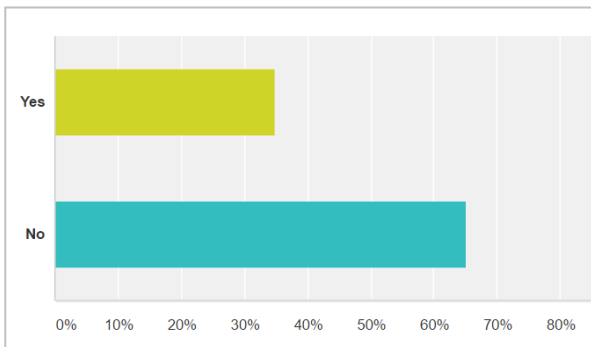


Would you be happy to pay a higher conference delegate fee for external speakers?

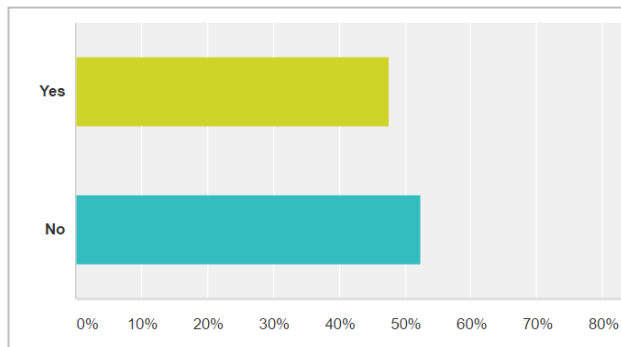


# Membership survey results

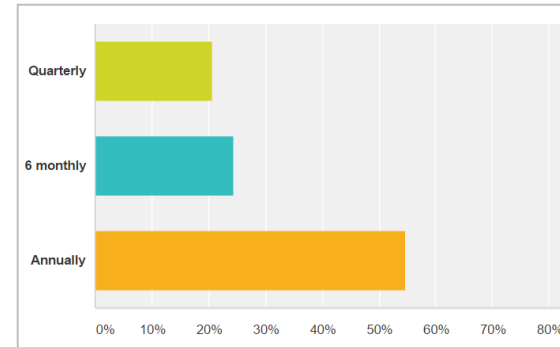
Would you like more sub-regional meetings?



Do you want more niche/specialist groups?



How frequently would you like the specialist groups?

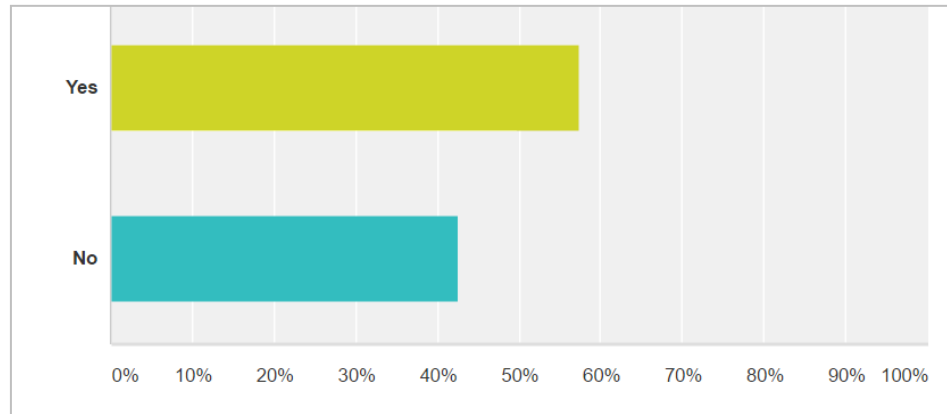


# Specialisms to focus on?

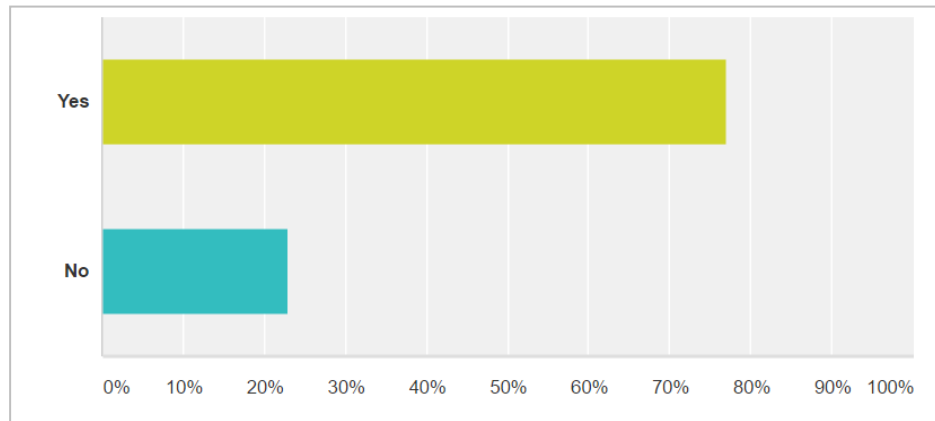
- High end tax advice
- International / Cross border tax
- Audit firms
- Forensic Auditing
- Insolvency Practice
- Investment incentives
- VAT / sales tax
- How to win international business
- Cultural understandings. How to do business abroad

# Membership survey results

Would you like IAPA to open membership to law firms offering tax services as well as accountancy firms?



Would you like IAPA to interact with other International Accounting Groups to share expertise and specialisms for the purpose of servicing global clients?



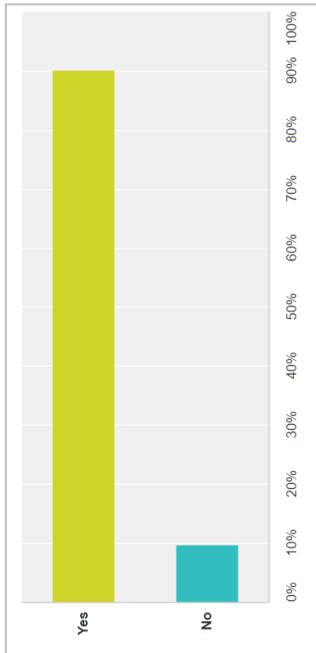
Interacting with other associations...  
We already do this:

**IAPA Shadow  
List**

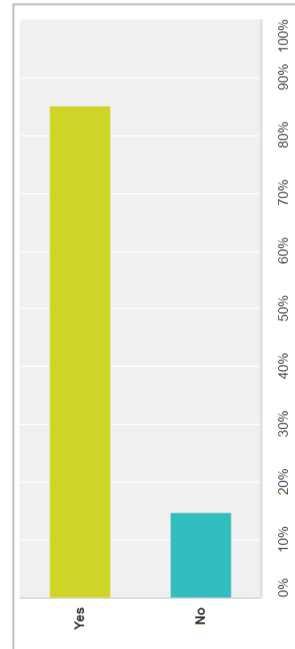


London  
Executives

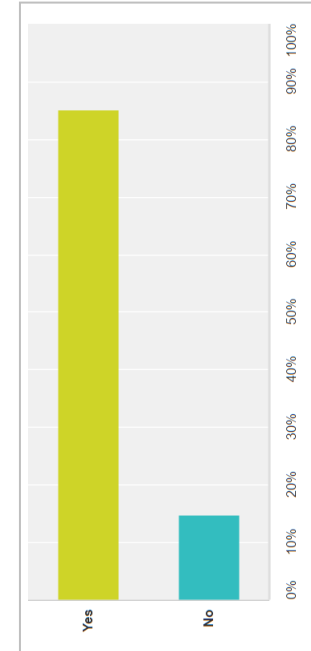
# Membership Survey results



Are you happy with the IAPA website and members' portal?



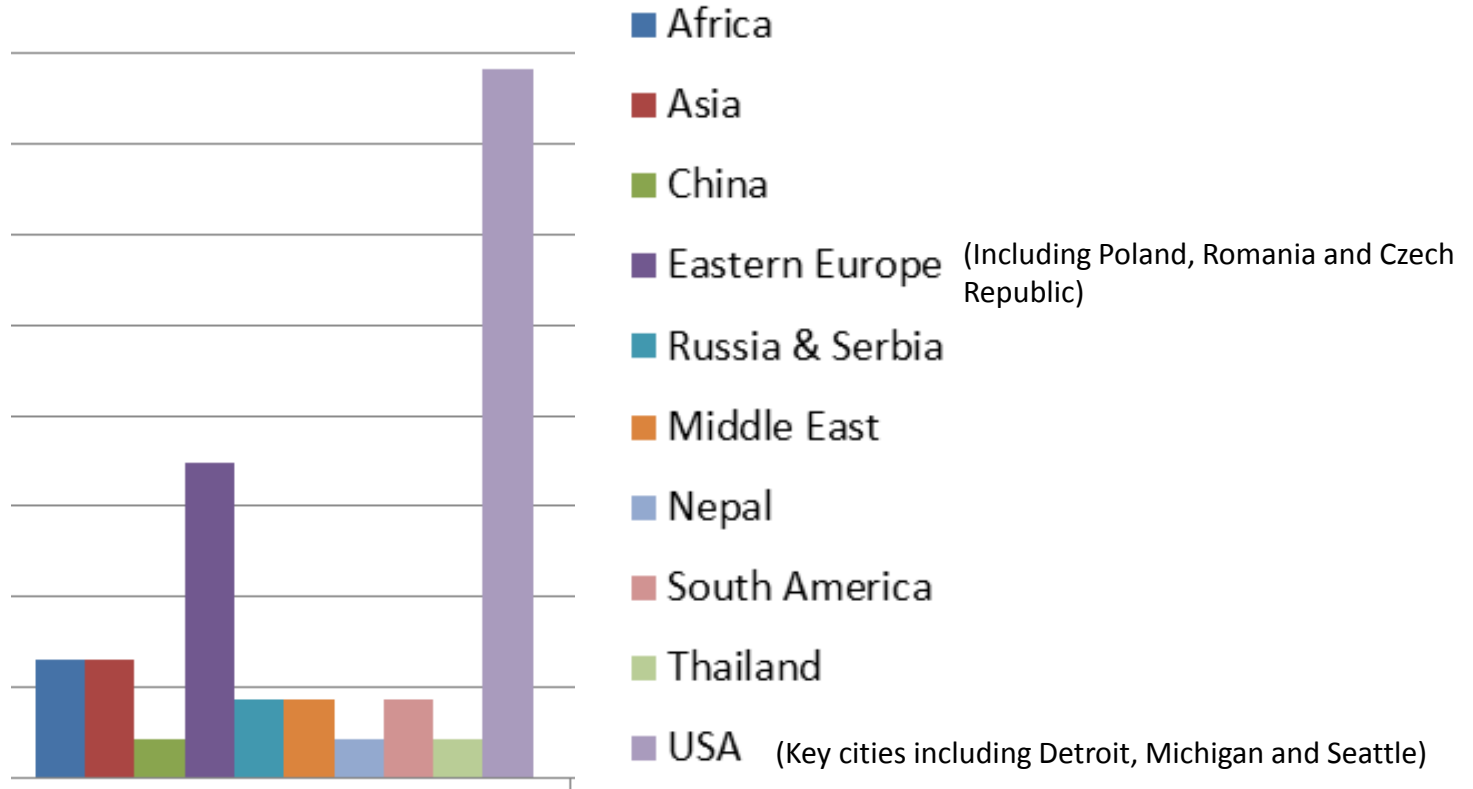
Is there sufficient content on the website and portal?



Do you feel there is sufficient communication from IAPA?



# Locations you feel IAPA lacks members







# Testimonials

We joined IAPA to ensure that our clients with international needs can receive great service and advice from a trusted firm almost anywhere in the world. This benefits our clients who may otherwise feel they need to hire a firm. We have also received benefits from membership as a marketing tool

Global support, local knowledge captures it beautifully. We receive a reasonable amount of referrals and use our membership as a marketing tool

The ability to provide our clients international contacts so that our clients can grow their businesses

...ing tool when discussing our services with potential clients. We can provide them access to professional firms should they want to do business in other countries.



# Summary and goals

The majority of members ***are happy and feel they get value for money*** with their membership.

They are ***happy with the communication from the Centre*** including the content posted on the website or portal.

Areas to focus on include:

- ❖ Expanding and enhancing member services
- ❖ Raising the profile of IAPA
- ❖ Global coverage / expanding membership whilst maintaining quality
- ❖ Conferences / meetings
- ❖ Open membership up to Law firms?
- ❖ Interaction with other International Accounting Groups to share expertise?



# Summary and goals

- This feedback endorses the action in our strategy plan
- We know what you want – the challenge is to make sure we do it properly
- IAPA's regions to be more active via the Regional Boards, assisted by the Centre



# Re-cap from Rio



- Summary of events in Rio
- What did our members want?
- Post Rio, what has happened?



# Where are we now? The International Board



Martin Clapson  
Vice-Chairman



John Campbell  
Treasurer and Canadian  
Representative



Ramon Gonzalez  
Latin-American Regional Chair



Mohd Noor Abu Baker  
Asia-Pacific Regional Chair



Tom Rex  
USA Regional Chair



Ozgur Demirdoven  
EMEA Regional Chair



## Where are we now? Future leadership



# Questions?



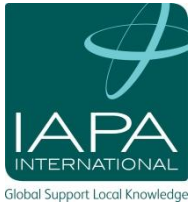


# IAPA USA Regional Conference Fontainebleau Beach Hotel, Miami 2017

## **Group Discussions – Enhancing the US region** *Facilitated by Martin Clapson and Tom Rex*





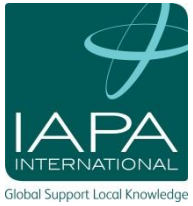


# IAPA USA Regional Conference Fontainebleau Beach Hotel, Miami 2017

## Items for discussion:

1. How to recruit new members:  
Resources? Third party engagement?  
Key locations?  
How can the US members' help?  
IAPA hosted recruitment meetings in key locations?
2. Promoting IAPA within the USA:  
Your requests/ideas?
3. One-day events /webinars on soft skills or technical issues:  
Do US members want this?  
Tie in with recruitment meetings?





# 1. How to recruit new members:

- Resources? [AG firms?]
- Third party engagement?
- Key locations?
- How can the US members' help?
- IAPA hosted recruitment meetings in key locations?

## *Key Locations as per the new IAPA strategy document:*

- New York
- Boston
- San Diego
- Los Angeles
- Vancouver
- Atlanta
- Chicago
- Dallas
- Toronto
- Montreal
- Philadelphia
- Washington
- San Francisco
- Miami

## *Additional key Locations as per the members' survey:*

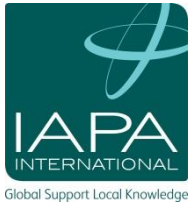
- Detroit
- Michigan
- Seattle



# IAPA statistics – US Region

Date: May 2017

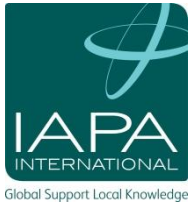




## 2. Promoting IAPA:

- Within the US Region? National trade press / key US media dealing with International accounting/tax issues
- Your press contacts





### 3. One-day events /webinars on soft skills or technical issues:

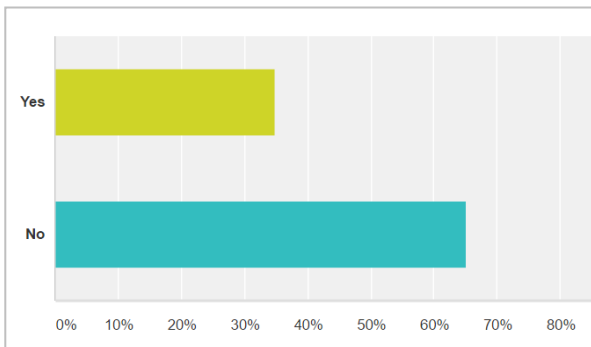
- Do US members want this?
- Tie in with recruitment meetings?
- Alternatively regular teleconferences?

*A reminder of the recent members' survey results..... see next 3 slides*

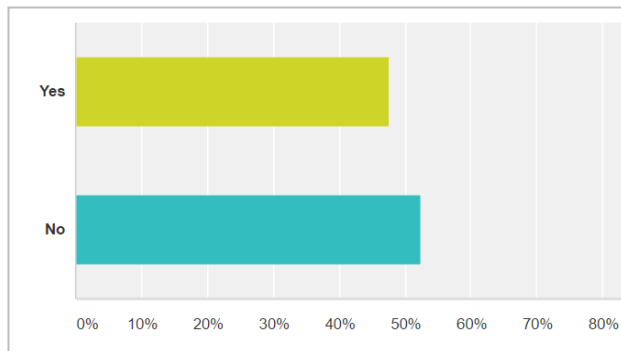


# Membership survey results

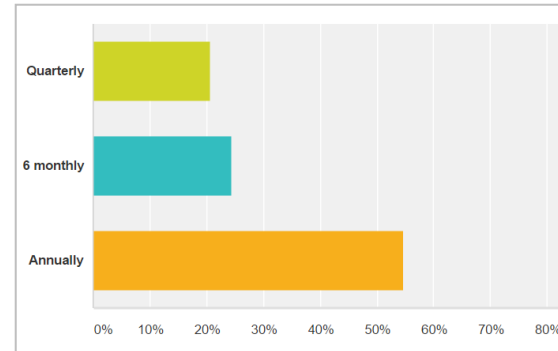
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How frequently would you like the specialist groups?

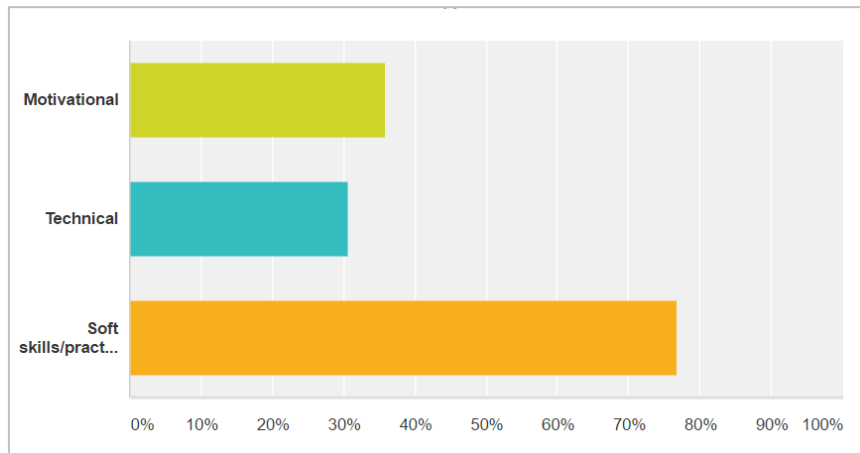


# Specialisms to focus on?

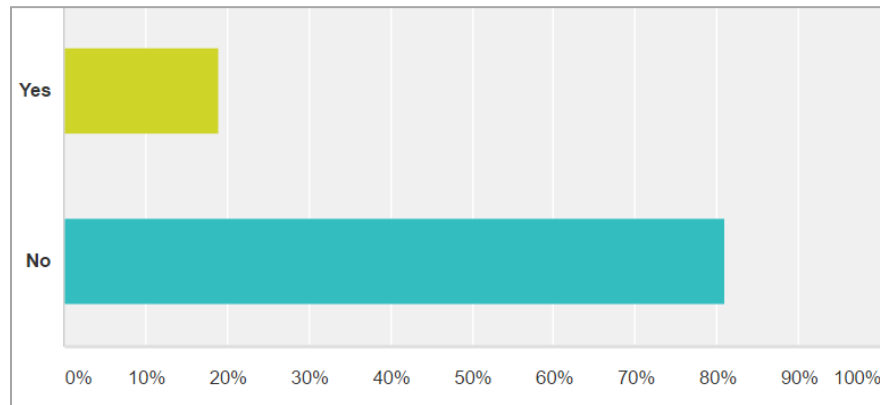
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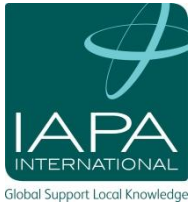
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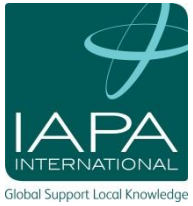




- One-day events /webinars on soft skills or technical issues:
  - Do US members want this?
  - Tie in with recruitment meetings?

*What can the Centre organise for you?*



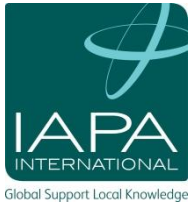


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## Coffee and networking

11.00am – 11.30am





# IAPA USA Regional Conference Fontainebleau Beach Hotel, Miami 2017

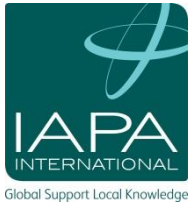
## Doing Business in the USA. Challenges and Opportunities

*An update from Gerson, Preston, Klein, Lips, Eisenberg 7 Gelber*

Or

**Roundtable discussions:** *Continuing discussions from the Morning, or, a topic of members' choice e.g.. preliminary planning on proposal 'Border Adjustment' in a tax package*





# IAPA USA Regional Conference Fontainebleau Beach Hotel, Miami 2017

## Lunch

*The afternoon is free for delegates and guests to enjoy the hotel facilities or explore the wonderful Miami Beach area, accessible by foot.*

## Tonight

*8.00pm: Dinner at Scarpetta Restaurant,  
Fontainebleau Miami Beach Hotel*

*Dress code: Smart/casual (no tie necessary)*

*Reminder Sunday:*

*Share ideas of best practice. 5 mins each. **Come prepared!***

