

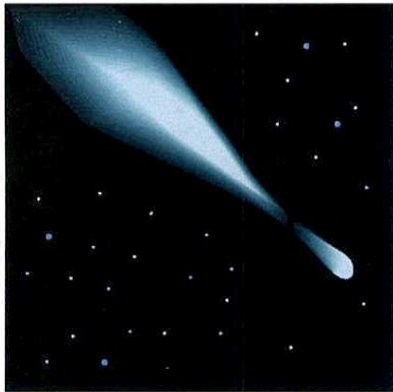
2014 CMRTA
ANNUAL CONFERENCE AGENDA

"Shoot for the Stars"
Pleasanton

Schedule at a Glance

Tuesday, October 14, 2014

- | | |
|-------------|--|
| 4:00 – 7:00 | Conference Registration |
| 1:30 – 5:30 | State Board Meeting (Open to All) |
| 7:00- 10:00 | Officers Training Session/Dinner
(State & Division Officers Only) |



Wednesday, October 15, 2014

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|-------------|---|
| 7:30 – 3:30 | Conference Registration |
| 8:00 – 8:45 | CRO Training |
| 9:00- 9:15 | Welcome Speaker |
| 9:15-10:15 | General Session |
| 10:15-10:30 | Networking Break |
| 10:30-12:00 | Keynote – "Shoot for the Stars" |
| 12:00- 1:00 | Light House Award Luncheon |
| 1:00 – 2:20 | Partnering with CSLB |
| 2:30 – 3:30 | The Massage Industry AB1147 |
| 3:30 – 4:00 | Networking Bingo |
| 4:00 – 5:00 | Business License 101 |
| 4:00 – 5:00 | Business Tax Delinquencies –
Prevention & Collection |
| 6:00 – 7:00 | Opening Night Reception hosted
by Muni Services |

Thursday, October 16, 2014

- | | |
|--------------|---|
| 8:30 – 12:00 | Conference Registration |
| 8:00- 10:00 | Handling Difficult Customers |
| 10:00-10:15 | Networking Break |
| 10:15-11:45 | Legislative Update |
| 11:45-12:30 | Technology Update |
| 12:30- 1:30 | Associate Members' Appreciation
Luncheon |
| 1:30 – 2:30 | Technology Update |
| 2:30 – 3:30 | Utilizing the Internet for Leads |
| 2:30 – 3:30 | Finding the Hidden Revenue Treasures |
| 3:30 – 4:00 | Technology Break |
| 4:00 – 5:00 | Franchise Tax Board Program and
Utilizing the Data |
| 4:00 – 5:00 | Sales Tax Update – Trends and Audit
Techniques |
| 6:00 – 7:00 | President's Reception – Hosted by HDL |
| 7:00- 11:00 | Awards Banquet & Fundraiser Event |

Friday, October 17, 2014

- | | |
|-------------|---|
| 8:30- 10:00 | CRO Testing |
| 9:00- 10:00 | Patterns of Success |
| 10:15-11:00 | BL Auditing & Discover Using CAATs |
| 10:00-10:15 | Networking Break |
| 11:00-11:30 | Exchange of Expertise &
Conference Wrap Up |
| 11:30- 1:00 | State Board Meeting (Open to All) |

**SEE YOU AT THE 2015 ANNUAL CONFERENCE
IN BURBANK OCTOBER 14-16TH!**

46th Annual CMRTA Conference
 "Shoot for the Stars"
 Pleasanton, CA
Daily Class Schedule

Wednesday October 15, 2014

Time	Location	Class	<i>CRO</i>
8:00-8:45	Triple Crown	CRO Training - Maria Ibarra	I or G
9:00-9:15	Silver Bronze	Welcome Speaker – Mayor Jerry Thorne & Economic Dev. Director Pamela Ott	
9:15-10:15	Silver/Bronze	General Session	
10:15-10:30	Lobby Area	Networking Break	
10:30-12:00	Gold	Keynote – "Shoot for the Stars" Brenda Knight, Brenda Knight Events	B, M or G
12:00-1:00	Silver/Bronze	Lighthouse Award Luncheon	
1:00-2:20	Gold	Partnering with the Cal. State Licensing Board Ellen Brittain & Cynthia Moore, CSLB	B, L, M, G or H
2:30-3:30	Gold	The Massage Industry AB1147 Kirstin Kolpitcke, League of California Cities	B, L, M or G
3:30-4:00	Lobby Area	Networking Bingo	
4:00-5:00	Triple Crown	Business License 101 John Sunkel, City of El Cajon	B, C, G or H
4:00-5:00	Gold	Business Tax Delinquencies - Prevention & Collection, Darlyne Demeduk, HdL	B,C or G
6:00-7:00	Stadium	Annual Opening Night Reception Hosted by MuniServices	

46th Annual CMRTA Conference
 "Shoot for the Stars"
 Pleasanton, CA
 Daily Class Schedule

Thursday October 16, 2014

Time	Location	Class	CRO
8:00-10:00	Silver/Bronze	Handling Difficult Customers Susan Morado, Financial Credit Network	B, M or G
10:00-10:15	Gold	Networking Break	
10:15-11:45	Silver/Bronze	Legislative Update Fran Mancina, MuniServices	L or G
11:45-12:30	Gold	Technology Update	
12:30-1:30	Silver/Bronze	Associate Members' Appreciation Luncheon	
1:30-2:30	Gold	Technology Update Continued...	
2:30-3:30	Wimbledon	Utilizing the Internet for Leads Allen Atamer,	B, C, M or H
2:30-3:30	Triple Crown	Finding the Hidden Revenue Treasures David McPherson, City of Oakland	B, C, M or H
3:30-4:00	Gold	Networking Break	
4:00-5:00	Wimbledon	Franchise Tax Board Program & Utilizing the Data, Felicia Hicks, FTB	B, C, M, G, I or H
4:00-5:00	Triple Crown	Sales Tax Update – Trends & Audit Techniques Andy Nickerson & Robin Sturdivant, HdL	G or H
6:00-7:00	Foyer	President's Reception Hosted by HDL Companies	
7:00-11:00	Silver/Bronze/ Gold	Awards Banquet & Fundraiser Event	

46th Annual CMRTA Conference
"Shoot for the Stars"
Pleasanton, CA
Daily Class Schedule

Friday October 17, 2014

Time	Location	Class	<i>CRO</i>
8:30-10:00	Triple Crown	Certified Revenue Officer Examination	
9:00-10:00	Wimbledon	Patterns of success Noah Moerbeek, Progressive Solutions	B, M or G
10:10-10:15	Lobby Area	Networking Break	
10:15-11:00	Wimbledon	Business License Auditing & Discovery Using CAATs Chuck Maurer, City of Oakland	B, C, M,G or H
11:00-11:30	Wimbledon	Exchange of Expertise & Conference Wrap Up	B, G or C
11:30-1:00	Wimbledon	State Board Meeting	

Everyone is invited to attend

ADJOURN UNTIL NEXT YEAR

MARK YOUR CALENDARS!
47TH ANNUAL CMRTA CONFERENCE
OCTOBER 14-16, 2015
BURBANK, CA