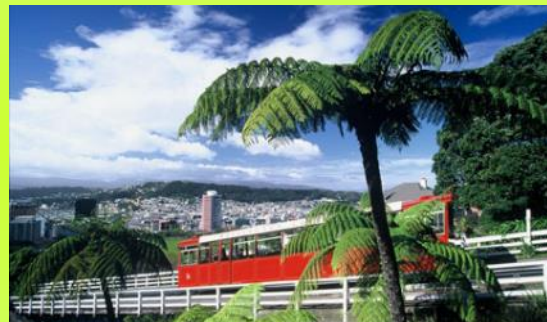


Staff Training Conference *(3~5 yrs)*

5 ~ 6 September 2024

Copthorne Hotel, Wellington



Presentations by:

- Matt Rogers, BM Accounting
- Aaron Thompson & Jarrod Neville, CA ANZ
- McDonald Vague Team
- Mel Morris, Xero
- Sally Duxfield
- Phil Bell, nsaTax



NZ CA Key Suppliers



NZ CA Staff Training Conference (3 ~ 5 yrs experience)

We are delighted to have you join us for this exciting and enriching event. Over the next two days, you will have the opportunity to engage with thought leaders and subject matter experts, participate in hands-on workshops, and connect with colleagues from across the NZ CA membership. Our goal is to provide you with the tools, knowledge, and inspiration needed to excel in your roles and drive our collective success forward.

Thank you for being here and for your commitment to continuous learning and professional growth. Let's make this conference a memorable and impactful experience together!

Day One: Thursday 5 September 2024

9.0 CPD Hrs

10.00am	Registration & Morning Tea
10.30am	Improve your Budgeting and Cash Flow Forecasting Skills This session will give you hands on tools and tricks to prepare and manage better forecasts. It will also look at ways that you can create and close the opportunity to provide forecasts with clients, maximise follow up effectiveness and ensure your clients get the most value possible from this engagement. Matt Rogers, BM Accounting
1.5 CPD	
12.00pm	Lunch
12.45pm	Start Building Client Relationships and Better Networks This session will get you thinking about your personal brand with clients and how you can start to build better relationships. It will give practical tips and anecdotes about building and marketing your personal brand, finding target clients, managing client expectations creating good systems for following up and following through. Matt Rogers, BM Accounting
1.5 CPD	
2.15pm	Afternoon Tea
2.30pm	Chartered Accountants Australia & New Zealand (CA ANZ) is your partner in shaping a successful career in public practice. As such we're committed to guiding members through comprehensive career pathway planning where you'll master technical expertise, excel in client management, solve complex problems, communicate effectively, and uphold the highest ethical standards. In collaboration with NZ CA, our shared vision for the next generation of accountants is dynamic and forward-thinking, embracing technology, focusing on sustainability, committing to lifelong learning, and navigating the global financial landscape. CA ANZ presenters Aaron Thompson & Jarrod Neville
1 CPD	
3.30pm	Insolvency 101 The team at McDonald Vague will be presenting a session focusing on the key differences between corporate insolvency and personal insolvency and how they will accept the entities involved. We will run through the pre appointment process to identifying signs of financial distress and what we look for in the documents provided beforehand (financials, bank statements, debtors and creditors etc.) Lastly we will cover the responsibilities and potential liabilities of directors in insolvency situations following the recent court decisions focused on this particular aspect. McDonald Vague Team
1 CPD	
4.30pm	Day One Concludes
6.00pm	Conference Dinner, Monsoon Poon Meet in the hotel foyer for a 8 minute walk to tonight's dinner venue, Monsoon Poon. Vibrant South East Asian dining just off Courtenay Place, where we can indulge in the classics with some modern surprises in their private dining space, the Atrium.

Meet in the hotel foyer to walk to our dinner venue



NZ CA Staff Training Conference (3 - 5 yrs experience)

Day Two: Friday 6 September 2024

8.45am	Arrival Tea and Coffee
9.00am 1 CPD	How Disruptive Technology can drive Productivity & Transform the Accounting Industry This presentation will explore what a small business of the future may look like and five key areas associated with technological advancement - connectivity, AI, computing, fintech and compliance. It will delve further what this means for the accounting sector so attendees come away with an understanding of how to evolve to meet the changing needs of their client base, and improve profitability and productivity. Mel Morris, Partner Community Manager, Xero
10.00am	Morning Tea
10.30am 2 CPD	7 Key Bio-Hacks The Neuroscience of Wellbeing' – a trans-formative session designed to empower you with the knowledge required to make informed decisions about your personal wellbeing and that of your family. This groundbreaking session is the key to fostering enhanced capacity, building resilience and elevating overall wellbeing within your organisation. We will delve into the cutting edge world of neuroscience. This fast paced, fascinating download of neurobiology based information and actions, will enlighten you, confirm what you may have known, but didn't know the science behind; fostering sleep, enhancing resilience and elevating personal wellbeing, to allow you to sustain performance. Key Takeaways: <ol style="list-style-type: none">1. Explore the science of your stress response2. Recognize and mitigate your own response to stress, and3. Leave with actionable bio-hacks for increased well being Sally Duxfield
12.30pm	Lunch
1.15pm 1 CPD	nsaTax Update Tax Update – an update on topical tax issues. Phil Bell, nsaTax
2.15pm	Conference Concludes

Booking Information

Accommodation and meals will be booked on your behalf as per your request on your individual online registrations. We have secured Rooms at \$229.00 inc GST and breakfast for one, all expenses incurred will be collated and invoiced to individual firms following the event. Presentations and handouts will be made available on the NZ CA website following the meeting.

Copthorne Hotel, 100 Oriental Parade, Wellington
Tel 4 385 0279 | www.millenniumhotels.com



Conference Manager
Heather Menzies, NZ CA Limited
Email: heather@nzca.com
Mobile: 021 432 843

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Jai Sanders
Commercial Insurance
+64 9 362 9134
jai.sanders@aon.com

Lesley Runciman
NZ CA Liability Scheme and Relationship Manager
+64 21 587 661
Lesley.runciman@aon.com

Aaron Sheeran
Client Advisor
+64 27 523 3271
aaron.sheeran@aon.com

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NZ CA Intermediate (3~5 yrs) Training Conference

Copthorne Hotel, Wellington

5 ~ 6 September 2024

1	Naveena	Joon	Accountants Hawkes Bay	Senior Accountant	naveenaj@accountantshb.co.nz	Napier
2	Jannaya	Feather	BM Accounting	Senior Accountant	jannaya@bm.co.nz	Havelock North
3	Sarah	Bartholomew	BM Accounting	Senior Accountant	sarah@bm.co.nz	Havelock North
4	Crystal-Mari	Geldenhuys	BM Accounting	Senior Accountant	crystal-mari@bm.co.nz	Havelock North
5	Jackie	Watts	BM Accounting	Accountant	jackie@bm.co.nz	Havelock North
6	Sarah	Harcourt	Brophy Knight	Accountant	sarahh@brophyknight.co.nz	Ashburton
7	Hannah	Chamberlain	Brown Glassford & Co	Accountant	hannah.chamberlain@brownglass.co.nz	Christchurch
8	Brenda	Lister	Brown Glassford & Co	Accountant	brenda.lister@brownglass.co.nz	Christchurch
9	Gaynor	LeQuesne	Harris Taylor	Account Manager	gaynor.lequesne@harristaylor.co.nz	Hawera
10	Deborah	Collins	Harris Taylor	Account Manger	deborah.collins@harristaylor.co.nz	Hawera
11	Renee	Forysth	ICL Chartered Accountants	Accountant	renee.f@iclca.co.nz	Alexandra
12	Emily	Edgar	ICL Chartered Accountants	Accountant	emily@iclca.co.nz	Alexandra
13	Jen	Bedford	ICL Chartered Accountants	Accountant	jenny@iclca.co.nz	Alexandra
14	Megan	Andrews	ICL Chartered Accountants	Accountant	megan@iclca.co.nz	Alexandra
15	Eden	Van Leeuwen	McIntyre Dick	Client Advisor	edenv@mdp.co.nz	Invercargill
16	Angela	Oppatt	Naylor Lawrence & Associates	Chartered Accountant	angelao@nla.net.nz	Palmerston North
17	Lindie	Kirton	RSM New Zealand	Intermediate Accountant	lindie.kirton@rsmnz.co.nz	Albany, Auckland
18	Yizhou	Bai	RSM New Zealand	Intermediate Accountant	alex.bai@rsmnz.co.nz	Albany, Auckland
19	Sherry	Huang	RSM New Zealand	Accountant	sherry.huang@rsmnz.co.nz	Albany, Auckland
20	Kate	Lee	RSM New Zealand	Intermediate Accountant	kate.lee@rsmnz.co.nz	Albany, Auckland
21	Audrey	Zhang	RSM New Zealand	Accountant	audrey.zhang@rsmnz.co.nz	Albany, Auckland
22	Luke	Hayson	Vazey Child	Accountant	Lukeh@vazeychild.co.nz	Hamilton
23	Raukawa	Raynel	Vazey Child	Accountant	rauawar@vazeychild.co.nz	Hamilton
24	Paige	Moody	Vazey Child	Accountant	paigem@vazeychild.co.nz	Hamilton
25	Carl	Southorn	YRW Limited	Accountant	Carl@yrw.co.nz	Tauranga
26	Caitlyn	Donaghy	YRW Limited	Accountant	caitlyn@yrw.co.nz	Tauranga
27	Nicole	Elling	YRW Limited	Accountant	nicole@yrw.co.nz	Tauranga

NZ CA Intermediate Staff Training Accom

First name	Last name	Email address	Organisation	4-Sep	5-Sep
Jannaya	Feather	jannaya@bm.co.nz	BM Accounting Limited		1
Sarah	Bartholomew	sarah@bm.co.nz	BM Accounting Limited		1
Crystal-Mari	Geldenhuis	crystal-mari@bm.co.nz	BM Accounting Limited		1
Jackie	Watts	jackie@bm.co.nz	BM Accounting Limited		1
Sarah	Harcourt	sarahh@brophyknight.co.nz	Brophy Knight Limited		1
Hannah	Chamberlain	hannah.chamberlain@brownglass.co.nz	Brown Glassford & Co Ltd		1
Brenda	Lister	brenda.lister@brownglass.co.nz	Brown Glassford & Co Ltd		1
Gaynor	LeQuesne	gaynor.lequesne@harristaylor.co.nz	Harris Taylor Limited		1
Deborah	Collins	deborah.collins@harristaylor.co.nz	Harris Taylor Limited		1
Renee	Forysth	renee.f@iclca.co.nz	ICL Chartered Accountants	1	1
Emily	Edgar	emily@iclca.co.nz	ICL Chartered Accountants	1	1
Jen	Bedford	jenny@iclca.co.nz	ICL Chartered Accountants	1	1
Megan	Andrews	megan@iclca.co.nz	ICL Chartered Accountants	1	1
Eden	Van Leeuwen	edenv@mdp.co.nz	McIntyre Dick		1
Angela	Oppatt	angelao@nla.net.nz	Naylor Lawrence & Associates		1
Lindie	Kirton	lindie.kirton@rsmnz.co.nz	RSM New Zealand (Auckland North)		1
Yizhou	Bai	alex.bai@rsmnz.co.nz	RSM New Zealand (Auckland North)		1
Sherry	Huang	sherry.huang@rsmnz.co.nz	RSM New Zealand (Auckland North)		1
Kate	Lee	kate.lee@rsmnz.co.nz	RSM New Zealand (Auckland North)		1
Audrey	Zhang	audreyzhang@rsmnz.co.nz	RSM New Zealand (Auckland North)		1
Luke	Hayson	Lukeh@vazeychild.co.nz	Vazey Child Limited		1
Raukawa	Raynel	rauikawar@vazeychild.co.nz	Vazey Child Limited		1
Paige	Moody	paigem@vazeychild.co.nz	Vazey Child Limited		1
Carl	Southorn	Carl@yrw.co.nz	YRW Limited		1
Caitlyn	Donaghy	caitlyn@yrw.co.nz	YRW Limited		1
Nicole	Elling	nicole@yrw.co.nz	YRW Limited		1

Conference Dinner: Monsoon Poon

Depart the hotel foyer for a 10 min walk

Jannaya	Feather	BM Accounting Limited	1
Sarah	Bartholomew	BM Accounting Limited	1
Crystal-Mari	Geldenhuys	BM Accounting Limited	1
Jackie	Watts	BM Accounting Limited	1
Sarah	Harcourt	Brophy Knight Limited	1
Hannah	Chamberlain	Brown Glassford & Co Ltd	1
Brenda	Lister	Brown Glassford & Co Ltd	1
Gaynor	LeQuesne	Harris Taylor Limited	1
Deborah	Collins	Harris Taylor Limited	1
Renee	Forysth	ICL Chartered Accountants	1
Emily	Edgar	ICL Chartered Accountants	1
Jen	Bedford	ICL Chartered Accountants	1
Megan	Andrews	ICL Chartered Accountants	1
Eden	Van Leeuwen	McIntyre Dick	1
Lindie	Kirton	RSM New Zealand	1
Yizhou	Bai	RSM New Zealand	1
Sherry	Huang	RSM New Zealand	1
Kate	Lee	RSM New Zealand	1
Audrey	Zhang	RSM New Zealand	1
Luke	Hayson	Vazey Child Limited	1
Raukawa	Raynel	Vazey Child Limited	1
Paige	Moody	Vazey Child Limited	1
Carl	Southorn	YRW Limited	1
Caitlyn	Donaghy	YRW Limited	1
Nicole	Elling	YRW Limited	1
Heather	Menzies	NZ CA	1