



Power Panel: Serving the mid-market professional services niche - getting and keeping high-value clients

Matthew Fulton, Carla Caldwell, Hector Garcia, Brittany Malidore, Mario Nowogrodzki



CPE Process

In order to receive CPE credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPE**
- CPE certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

About today's moderator



Matthew Fulton

@Parkwayinc

CTO, Parkway Business Solutions

Panelists



Carla Caldwell
@carla_Caldwell
Caldwell Consulting &
Training LLC



Hector Garcia, CPA
@qbkaccounting
Garcia & Company, PA



Brittany Malidore
Peterson Sullivan LLP



Mario Nowogrodzki, CPA
@Mendels0n
Mendelson Consulting



Carla Caldwell
@carla_Caldwell
Caldwell Consulting &
Training LLC



Hector Garcia, CPA
@qbkaccounting
Garcia & Company, PA



Brittany Malidore
Peterson Sullivan LLP

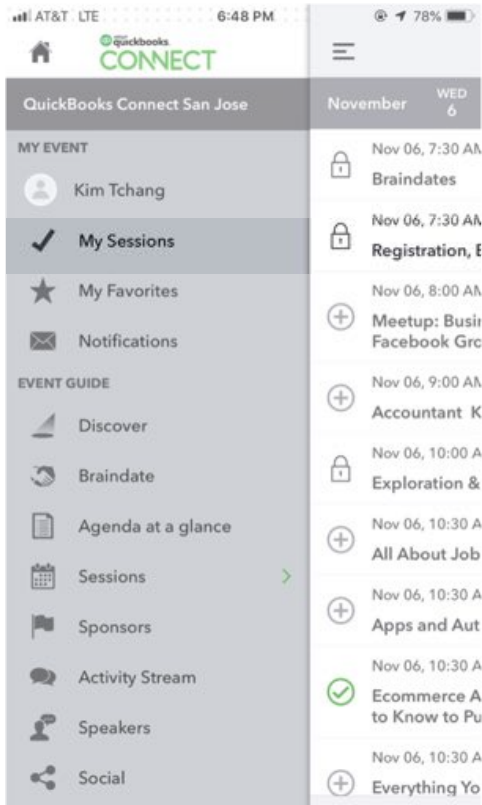


Mario Nowogrodzki, CPA
@Mendels0n
Mendelson Consulting

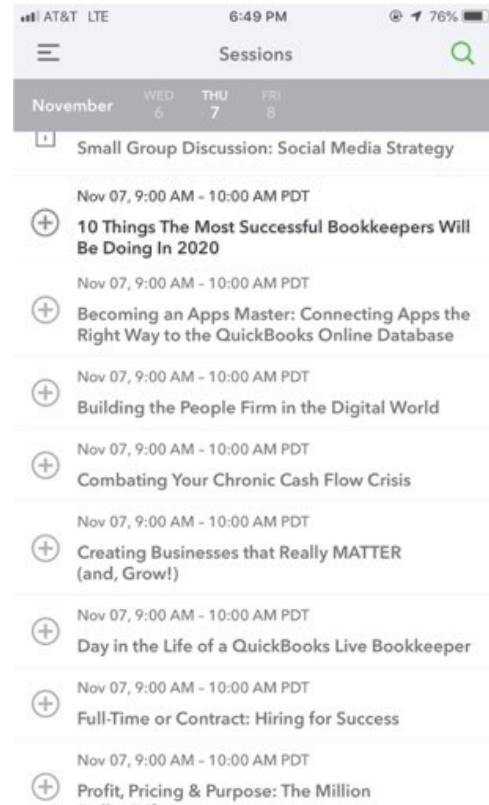
Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

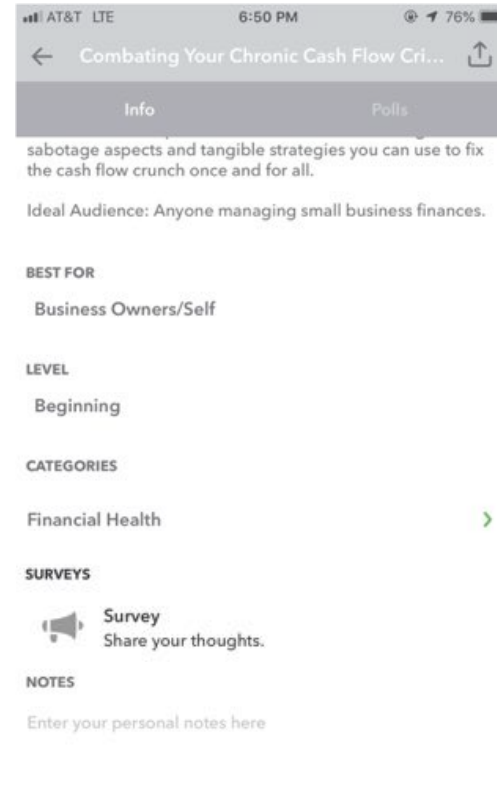
1. Select Sessions



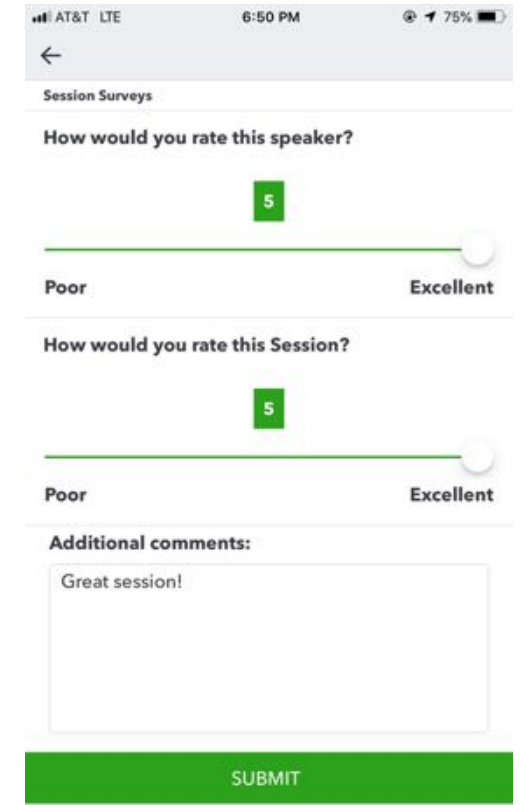
2. Select Session Title



3. Select Survey



4. Add Ratings



Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks CONNECT agenda page for November 7. The page features a navigation bar with the QuickBooks CONNECT logo and links for Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, and FAQ. A 'Register now' button is in the top right. Below the navigation, there are tabs for November 6 (Accountant Day), November 7 (selected), and November 8. A 'Print Agenda' link is also present. The main content area includes a search bar for sessions and a filter section with categories: Business Growth, Life & Business Skills, Organizational Culture, Technology Training, Advisory, and Financial Health. The agenda items for November 7 are:

- 7:30-9:00 am: Registration, Breakfast & Exploration
- 7:30-10:30 am: **Braindates** (marked with an 'x'). Description: 'New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. [Learn more](#)'. Best for: All Audiences. CPE Hours: not eligible.
- 8:00-8:30 am: Yoga (marked with a '+')
- 8:00-8:45 am: **Breakout Sessions**
- Small Business Meetup: Relationship Marketing and the Power of Human Connection (marked with a '+')
- Small Group Discussion: Social Media Strategy (marked with a '+')
- Small Group Discussion: Showing up - Why What You Wear Matters (marked with a '+')
- Small Group Discussion: Build Your Dream Bookkeeping firm (marked with a '+')

 **CONNECT**

OWN
THE
FUTURE
TURE