



# 2020 Conference Information Packet

*San Francisco, California | August 24–28, 2020*



## San Francisco is known for having a culture all its own, marching to the beat of its own drum.

For visitors, its famous neighborhoods, attractions, and landmarks offer an ideal opportunity to explore the city's history and dive into its culture head first. Alcatraz, the Golden Gate Bridge, Coit Tower, Fisherman's Wharf, and the Haight-Ashbury neighborhood are all popular destinations at the core of the San Francisco experience. The city is also known for its amazing food—taking fresh, local ingredients and preparing them in surprising and delicious ways at the cutting edge of culinary experimentation. You'll also find incredible music within the city, ranging in tenor from their stunning symphony and opera to rock and roll playing in local pubs. For our stay, we'll set up shop at the San Francisco Marriott Fisherman's Wharf.

## San Francisco Marriott Fisherman's Wharf

Located near many of the attractions that draw in millions of visitors each year, the San Francisco Marriott Fisherman's Wharf offers a quiet, relaxing atmosphere to enjoy after you're done with your daily adventures. Hang out in the hotel's Red Fin Restaurant and Lounge while you plot your next excursions out on the town. Once you're recharged, you can stroll right out to the wharf and PIER 39 and take in the ocean breeze.





# 2020 Conference Information Packet

San Francisco, California | August 24–28, 2020

## Course Schedule

Date	Course*	Instructor	Category
8/24/20	Everybody's Critical Individual Tax Issues in 2020	Doug Stives	Taxes
8/24/20	Rainmaking: Business Development Skills to Grow Your Business	Ed Robinson	Business Mgmt & Organization
8/25/20	Everybody's Critical Business Tax Issues in 2020	Doug Stives	Taxes
8/25/20	Leveraging and Influencing Generations to Win the Leadership Race	Ed Robinson	Business Mgmt & Organization
8/26/20	World's Liveliest Accounting and Auditing Update	Rod Redding	4 Accounting 2 Auditing
8/26/20	Investment Planning for the Next Decade: Shaping Out 2020	Jeff Rattiner	Taxes
8/27/20	Sustainability Accounting: The Expansion of Corporate Reporting  A Final Look at the New Leasing Standard for Private Companies	Rod Redding	Accounting
8/27/20	Tech Update and Best Practices	K2 Enterprises	Computer Software & Apps
8/28/20	Developing Appropriate Personal Financial Planning Strategies	Jeff Rattiner	Taxes
8/28/20	Better Financial and Operational Reporting with Excel	K2 Enterprises	Accounting

\*All courses are from 7:30 a.m. to 1:00 p.m. and worth 6 credits unless otherwise noted.

## Conference Prices

1 Day	2 Days	3 Days	4 Days	5 Days
<b>\$549</b>	<b>\$949</b>	<b>\$1,249</b>	<b>\$1,449</b>	<b>\$1,649</b>



# 2020 Conference Information Packet

San Francisco, California | August 24–28, 2020

## San Francisco Marriott Fisherman's Wharf

1250 Columbus Ave.

San Francisco, CA 94133

Phone: (800) 228-9290

<http://www.marriott.com/hotels/travel/sfofw-san-francisco-marriott-fishermans-wharf/>



**[Book Now! »](#)**

## Room Rates\*

<u>Room Type</u>	<u>Rate*</u>	<u>Beds</u>
Run of House	\$299.00	King or 2 Queens

\*Taxes are 16.445%.

- To secure our rate, please make your reservation as early as possible. Due to demand, we cannot guarantee room availability or rate.
- Rates are per room, per night, single or double occupancy.
- Rates are available 3 days before and after the conference.
- Group discounted rate is not available after **July 31, 2020**.

Check-in: 4:00 p.m.

Checkout: 12:00 p.m.



# 2020 Conference Information Packet

San Francisco, California | August 24–28, 2020

Question	Answer
Deposit	1 night plus tax
Cancellations	72 hours prior to arrival or 1 night plus tax charged
Additional Room Guests	Maximum 3 guests per room
Parking	Valet: \$62 per night (in/out privileges), non-hotel guests: \$15 first hour up to \$62
Wi-Fi	Complimentary in rooms and meeting area
Smoking/Non-Smoking	Non-smoking

## General Information

### Room Amenities

- Coffee maker
- Safe
- Flat-screen HDTV
- Free Wi-Fi
- Work desk
- Hair dryer

### Hotel Amenities

- Fitness center
- Room service
- Pet friendly
- Spa and salon services
- Business services

### On-Site Restaurants

- Red Fin Restaurant & Lounge



# 2020 Conference Information Packet

*San Francisco, California | August 24–28, 2020*

## Transportation and Directions

### Nearest Airport(s)

- San Francisco International (SFO)—16 miles or 50 minutes to the hotel
- Oakland International (OAK)—21 miles or 1 hour to the hotel
- Mineta San Jose International (SJC)—52 miles or 1.5 hours to the hotel

### Transportation

- Recommended Travel: Fly into SFO and take an Uber or taxi
- Uber or Lyft—available in this area
- Rental Car—Western CPE has discounts up to 25%
  - Avis—use Avis Worldwide Discount (AWD) code: X897396
  - Budget—use Budget Customer Discount (BCD) code: U178315
  - SFO—<http://www.flysfo.com/to-from/rental-cars>
  - OAK—<http://www.oaklandairport.com/ground-transportation/car-rentals/>
  - SJC—<http://www.flysanjose.com/rental-cars>
- [Driving Directions from SFO](#)
- [Driving Directions from OAK](#)
- [Driving Directions from SJC](#)



# 2020 Conference Information Packet

San Francisco, California | August 24–28, 2020

## San Francisco Conference Activities

### Sunday | August 23, 2020

#### Conference Reception

4:30 p.m.–5:30 p.m.

After arriving, please stop by the Western CPE registration desk from 4:30 p.m. to 5:30 p.m. to pick up your conference materials. We'll be available to answer any questions you might have about the courses and activities that are scheduled during the week.

### Monday | August 24, 2020

#### To Be Announced

0:00 p.m.–0:00 p.m. | \$0.00

Information Coming Soon!

*Pricing Coming Soon!*

### Tuesday | August 25, 2020

#### To Be Announced

0:00 p.m.–0:00 p.m. | \$0.00

Information Coming Soon!

*Pricing Coming Soon!*

### Thursday | August 27, 2020

#### To Be Announced

0:00 p.m.–0:00 p.m. | \$0.00

Information Coming Soon!

*Pricing Coming Soon!*

**Please note:** Prices are subject to change. Prices include service fees and taxes, where noted. Activity fees are nonrefundable.

**Register early!** Tickets and transportation for our optional Group Activities may be limited and are sold on a first-come, first-served basis.



## Conference Activities Registration Form

To register, please complete this form and fax it to (206) 774-1285 or call (800) 822-4194 and speak with a member of our Customer Care Team.

**CONFERENCE LOCATION:** \_\_\_\_\_

Activity	Day	Number of Participants	Cost	Total

Total Cost: \_\_\_\_\_

**Conference Attendee's Name:** \_\_\_\_\_

**Family/Guests' Names:**

Adults

Children and Ages

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### PAYMENT INFORMATION

Credit Card # \_\_\_\_\_  
(*Visa, MasterCard, American Express, or Discover*)

Expiration Date \_\_\_\_/\_\_\_\_ Security Code \_\_\_\_\_

Check Number \_\_\_\_\_ (please make payable to Western CPE)



**RELEASE FROM RESPONSIBILITY AND ASSUMPTION OF RISK  
AND POWER TO AUTHORIZE MEDICAL TREATMENT**

Complete only if you are participating in optional out-of-class activities. Release must be signed by each participating adult.

It being my intention to participate in the optional activities offered while attending the Western CPE conference, and it being known and understood by me that said participation in these optional activities shall necessarily involve exposure to risks to my person and my property, I do hereby assume the full responsibility for any such risks and do hereby waive any right to any claim against Western CPE or any of its employees or agents for any injury, loss, damage, accident, delay, or expense resulting from any acts or omission of any carrier, government, private legal entity, or third person. I also assume sole responsibility for and agree to indemnify Western CPE against any loss due to any financial obligations or liabilities that I may personally incur, or any damages or injury to persons or property that I may cause during the time of my participation.

I further release Western CPE from any claims arising from the aggravation of any physical disability or illness not disclosed to Western CPE and grant the employees of Western CPE full authority to take whatever actions they may consider to be warranted under the circumstances regarding my health and safety, and, at their discretion, to place me in any hospital or in the hands of any local doctor for medical treatment at my own expense, or to transport me by any means of conveyance required at my own expense for medical treatment or in the event of my demise.

I understand the optional activities will be conducted in and around the conference area, and I understand that these activities carry certain risks. I am in good health and, to my knowledge, I do not have any physical problems that would hamper my participation in said activities. I, the undersigned, being cognizant of the hazards of these activities, assume the risks of same and agree to indemnify and hold harmless Western CPE and its employees against any and all claims for damage on account of any injury to my person or property.

While participating in the activities, I am personally responsible for my own health insurance.

All of the above statements also pertain to any children under the age of 18 who may be participating in the activities under my care and direction.

Wherefore I have subscribed this document on this the \_\_\_ day of \_\_\_\_\_, 2020.

Print Names of Participants:

\_\_\_\_\_  
\_\_\_\_\_

Signatures of Participants:

\_\_\_\_\_  
\_\_\_\_\_

Conference Location: \_\_\_\_\_