



IT COMMUNITY

# Why Join the AICPA Technology Family

Presented by  
Jim Bourke, CPA.CITP  
Nancy Cohen, CPA.CITP



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## Agenda

- Benefits of the IT Community
- IT Membership Section Overview
- CITP Credential Overview
- Q&A Session
- Raffle Drawing



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## The AICPA IT Community

- Consists of:
  - Information Technology Membership Section (IT Section)
  - Certified Information Technology Professional (CITP) Credential



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## Benefits of the IT Community

- **Content**
  - Top Technology Initiatives Survey/List
  - Content Suites
  - Web Seminars
  - Podcasts
  - IT Competency Model
- **Community**
  - Conferences & Courses
  - Networking Groups
  - LinkedIn
- **Communication**
  - IT Links
  - Other Communications


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## 2008 Top Technology Initiatives (TTI):

- List was released in January 2008
- 2008 TTI Deliverables
  - o TTI Master Content Suite
  - o TTI Toolkit
  - o TTI Webinars
  - o Individual Content Suites
  - o Marketing Webinars


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## 2007 Content Suites



**Mobile & Remote Computing**  
Case Study: Project Balance



**Information Technology**  
Contributions to Risk-Based Auditing

**Protecting Client Data**  
Is My Firm At Risk?

Mobile & Remote Computing      Risk-Based Auditing      Data Protection


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## 2008 Content Suites

- **Data Extraction & Business Intelligence**
  - Web Seminar
  - Overview Paper: Data Extraction Framework
  - Discussion Paper I: Methodology & Technical Guidance
  - Case Study: AOL
  - Data Dictionary Template
- **CPA Firm Workflow**
  - Discussion Paper: CPA Firm Workflow
  - Tax & Audit Workflow
  - Case Studies: CPA Firms (Sm., Med., Lg.)
  - Schematic: Tax Workflow
  - Podcast
- **Trust Services/SAS 70**
  - Practitioners Guides

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## IT Web Seminars

- **Data & System Integration** (6/25/08)
- **IT General Controls for Financial Auditors** (Five-Part Series)
  - IT General Controls #1: Overview (July 2008)
  - IT General Controls #2: Logical Access (July 2008)
  - IT General Controls #3: Change Control (July 2008)
  - IT General Controls #4: IT Operations (August 2008)
  - IT General Controls #5: IT from the Audit Manager's Perspective (August 2008)
- **IT Governance** (July 2008)
- **CAATs II** (Fraud Focus) (8/21/08)
- **Vendor Management** (September 2008)
- **Project Risk Services** (October 2008)

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## IT Podcasts

- Approximately 15-20 min
- Available <http://toptechinitatives.podomatic.com/>
- **Topics**
  - Computer Assisted Auditing Tools and Techniques
  - Privacy (4 part series)
  - Business Process Improvement
  - Safeguarding Information Assets
  - Client Portals
  - IT Governance
  - Data Security and Business Process Outsourcing



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## Networking Groups



AICPA networking groups  
IT | CITP CONNECT COLLABORATE SUCCEED

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## LinkedIn

- Identify and reach out to fellow members
- Browse community profiles and find the specialized expertise you need to complement your practice or engagement.
- Share your own profile and elicit advice and new opportunities.
- If you are not already a LinkedIn member, create a profile today.
- Special Groups for CITP and ITMS



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## IT LINKS

- Monthly Communication
  - ITEC Chair Letter
  - CITP Chair Letter
  - IT eNews
  - InfoTech Update
  - IT Spotlight
  - IT Community News & Information



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## Other Communications

- Free subscription to the CPA Technology Advisor magazine
- Soon to be released – SmartBrief



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## Information Technology Section (IT Section)



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## What is the IT Section?

- The IT Section is an AICPA voluntary membership section that serves as a technology resource to keep you informed on the latest trends in technology from a unique CPA perspective



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## Why Join the IT Section

- Stay informed on the latest CPA firm technology tools and software applications.
- Keep abreast of the technology issues your clients are facing to increase their bottom line and help them remain competitive
- Utilize tools and resources to better serve your clients
- Strive to implement new applications in your organization to run more efficiently or better serve your clients
- Advise your clients and key leaders as they implement technology to maintain their competitive advantage
- Oversee or manage your organization's IT department or initiatives




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## How To Join the IT Section

- Annual dues for the IT Membership Section are \$200 for AICPA members
  - When you join by July 31, 2008 receive the IT Section for only \$100
  - Non-CPAs of public accounting firms can become a member of the AICPA and join the IT Section\*\*\*
- To join:
  - Complete the enrollment form here at TECH+ or enroll online

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## Certified Information Technology Professional (CITP)






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## What Is A CITP?

- A CITP is a CPA:
  - Credentialed by the AICPA
  - Recognized for their unique ability to bridge between business and technology
  - Has achieved a combination of IT-related certifications, degrees, continuing education and business experience providing them with a *wide range* of documented IT competency

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## What is a CITP?

- CPA.CITPs help organizations:
  - Implement and use workflow applications and process alerts to streamline operations, automate controls and improve managerial oversight
- In addition, the knowledge and experience CITPs gain as part of their CPA training gives them the skills they need to effectively:
  - Evaluate risk and manage the security of digital assets and information systems
  - Mitigate threats originating within or outside an organization's security perimeter

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**Donny Shimamoto**  
Managing Director, CPA.CITP  
Integrus/SM Knowledge LLC, Honolulu, HI

CPA.CITPs deal with key business initiatives that require deep business process knowledge and strong IT expertise. Other professionals lack the experience in both areas necessary to bring a **balanced perspective** and optimized solution to the table.



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Upgrade Your Business  
**Hire a CPA.CITP**



Business and Industry Consulting

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## What is a CITP?

- CPA.CITPs understand IT controls and their implications for enterprise risk and the financial reporting process.
- CPA.CITPs' technology and financial management expertise allows them to offer value-added services such as:
  - IT audit and attest (SAS 70, trust services reviews, SOX 404 IT)
  - Internal audit and compliance (SOX 404, enterprise risk)
  - IT security and risk services (DRP, BCM, IT security assessments)
  - Business process improvement (workflow analysis and design)
  - Governance (IT governance, vendor management, CIO services)

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Kathleen Gray, CPA | CFO CPA.CITP Client  
Midwest Corporate Credit Union, St. Louis, MO

Our CPA.CITP readily provides a holistic approach to our organization's information security needs and helps us bridge the gap between the "tech" side of IT and the management of day-to-day activities.

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Upgrade Your Business  
**Hire a CPA.CITP**



Public Practice, Audit and Assurance

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## What is a CITP?

- CPA.CITPs can help small and midsize businesses:
  - Integrate and streamline their accounting and IT processes and reports
  - Get the most out of their accounting software
  - Develop performance and productivity enhancing procedures that maximize profitability and client face-time

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Upgrade Your Business  
**Hire a CPA.CITP**



**Amy Vetter**  
President, CPA.CITP  
#1 Accounting Services, Weston, FL

The CITP credential lets my clients and future clients know I have not only the **accounting skills** and expertise they need, but end-to-end **technology solutions** to help re-engineer their business processes and accounting systems.



Small and Midsize Business Consulting




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## 2008 CITP Challenge

- Objectives:
  - To expand a communication pathway between the AICPA's CITP Credential Committee and Information Technology Committees at the state level
  - Inform the professional community about the vital role of IT in the financial management process
  - Recognize CPAs who possess unique IT expertise and experience.
- CITP Challenge will give its participants the structure to work together to inform the profession of these objectives through the benefits of the CITP.


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## 2008 CITP Challenge



**19 State Societies participating this year:**  
AZ, AK, CA, FL, GA, HI, IN, IA, KY, MA, MD, MI, NJ, ND, OH, PA, SC, TX, & VA.


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## 2008 CITP Challenge

- CITP Challenge Winners:
  - The state winners of the first Round of the CITP Challenge are as follows:
    - By the largest count: California Society of CPAs and Texas Society of CPAs tied with the largest number count increase for 1st place.
    - By the largest percentage: Hawaii Society of CPAs won the largest percentage increase for the 2008 CITP challenge, and North Dakota came in at a close 2nd place.

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## It's as Easy as 1.2.3

1. Hold a valid and unrevoked CPA certificate issued by a legally constituted state authority and be a member in good standing of the AICPA
2. Complete the CITP application and receive an evaluated score of at least 100 points

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## How To Become a CITP

- Account for the past 5 years of:
  - Qualifying degrees and certifications
  - Business experience hours
  - Life long learning
- Read and agree to the terms
- 3. Pay the CITP Enrollment Fee

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## How To Become a CITP

- Enrollment Fee for the CITP Credential is \$550 for AICPA members
  - When you join by July 31, 2008 - pay only \$350
  - When you join by the close of TECH+ - pay only \$300
  - Annual renewal fees are \$350
- To apply:
  - Complete the enrollment form here at TECH+ or enroll online


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**Join the AICPA IT Community!**  
**Stay ahead of the CPA technology curve and join the IT Section.**  
**Be more and become a CPA.CITP**

Questions?





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## Contact Information

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**AICPA IT Section/CITP Credential information**

Visit [www.aicpa.org/infotech](http://www.aicpa.org/infotech)  
Call 888-777-7077 option 4  
Email [ITinfo@aicpa.org](mailto:ITinfo@aicpa.org)

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