



INSTRUCTOR BIOGRAPHY

APPENDIX A

BIOGRAPHY & CONTACT INFORMATION

J. Carlton Collins, CPA

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Accounting Software Advisor

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J. Carlton Collins is an accounting software analyst and the editor of the Accounting Software Advisor web site. Since 1984, Carlton has worked in the accounting software industry installing systems, consulting with end users, lecturing to more than one hundred thousands businesses, consulting to accounting software companies, publishing books, articles and web sites. Carlton is experienced with many of the top accounting software packages such as MAS 500, BusinessWorks, Great Plains, Navision, Axapta, ACCPAC Advantage Series, Epicor, Open Systems Traverse, MAS 90, MAS 200, Exact's Macola ES, Peachtree Complete Accounting, Southware, SAP R/3, QuickBooks, Microsoft Small Business Accounting, BusinessVision 32, and more.

As a senior accountant, Carlton developed spreadsheet templates for financial feasibility studies that were used as a basis for more than \$1 billion in bond issues, including rated bonds, private placements, and junk bonds. Carlton became an advisor to Lotus Development Corporation where he developed spreadsheet templates on behalf of Lotus. In 1992 Carlton spent two days with the Excel development team where he painted his vision for Excel 4.0 including 500 pages of suggestions.

Selected Positions, Awards & Accomplishments:

- Has published extensive articles in the Journal of Accountancy and other magazines.
- Has delivered over 1,500 technology lectures as far away as Australia & New Zealand.
- Past Chairperson of the AICPA Technology Conference.
- Past two-term Chairperson of the Georgia Society of CPAs PC Advisory Committee.
- Past five-term President of the PC Consultant's Group of Atlanta - which he founded.
- Recipient of the Outstanding Discussion Leader Award from the Georgia Society of CPAs.
- Recipient of the AICPA Lifetime Technical Contribution to the CPA Profession Award.
- Named "Top Ten CPA Technologists" by Accounting Technologies Magazine.
- Lead author for PPC's Guide to Installing Microcomputer Accounting Systems.
- Has delivered keynote lectures at dozens of accounting software conferences, including the Microsoft BBC Conference and the Best Software Conference in 2004, and Microsoft Convergence in 2005.
- Has provided consulting services to many computer companies (*including Compaq, IBM, Microsoft, Apple, Novell, Peachtree, Epicor, Best Software, Softline, Exact, ACCPAC, Intuit, Peachtree, Great Plains, and others*).

Carlton's diverse background is an asset in providing his specialized consulting skills. He has six years of accounting, auditing and tax experience in the areas of health care, construction, distribution, automobile dealerships, insurance, manufacturing, and general business. His tax experience includes corporate, individual, partnership, fiduciary, and estate tax planning work. Carlton also has been heavily involved in the other areas of financial forecasts, bond issues, Medicare and Medicaid reimbursement, conventional financing, pension and profit sharing plans, and business planning.

CPE Course Evaluation Form

(In accordance with State Board guidelines, this form is retained as a permanent record of your attendance)

COURSE TITLE: Excel for CPAs 2005 DATE: _____

NAME: _____

COMPANY: _____

ADDRESS : _____

CITY, STATE, ZIP: _____

TELEPHONE: _____ E-MAIL: _____

Instructor's Name: J. Carlton Collins Excellent= 5 Very Good=4 Average=3 Fair=2 Poor=1

- | | | | | | |
|---|---|---|---|---|---|
| 1. The Discussion Leader's knowledge of the subject matter was: | ⑤ | ④ | ③ | ② | ① |
| 2. The Discussion Leader's presentation skills were: | ⑤ | ④ | ③ | ② | ① |
| 3. The learning objectives were met | ⑤ | ④ | ③ | ② | ① |
| 4. The course materials were valuable and contributed to learning | ⑤ | ④ | ③ | ② | ① |
| 5. The course content was relevant | ⑤ | ④ | ③ | ② | ① |
| 6. Time allocations were appropriate | ⑤ | ④ | ③ | ② | ① |
| 7. Please rate the quality of the facilities | ⑤ | ④ | ③ | ② | ① |
| 8. Were prerequisite requirements appropriate | ⑤ | ④ | ③ | ② | ① |
| 9. Please rate the effectiveness of the audio / visual systems | ⑤ | ④ | ③ | ② | ① |

COMMENTS

My Area is:

Public Practice

Industry

Government

Education

Other:

My Work Experience is:

None

0-5 years

6-10 years

11-20 years

More than 20 years

My Industry is:

Finance

Manufacturing

Retail

Services

Other:

The Size of my Company is:

5 or less employees

6 to 25 employees

26 to 100 employees

101 to 500 employees

501 or more employees

My Position is:

Owner or Partner

Manager/CFO

Supervisor

Senior or Staff

Administrative

Other

My Reason for Attending:

Course Reputation

Instructor

Location

Price

Subject

Other:

I heard about this course:

Course Brochure

Newsletter Ad

Telemarketing Call

Web Site

Word of mouth

Other:

My Computer Experience is:

None

Very Little

Moderate

Substantial

Excellent

I Use the Internet:

Never

A Little Bit

Moderately

Daily

All the Time

Other :

My Primary Computer is:

New

1 year old

2 years old

3 years old

4 years old

5 years old

My Opinion of Computers:

Can't live without them

They are very useful

Somewhat useful

Occasionally useful

More trouble than worth

I hate them

I get my CPE from:

CPA Society Seminars

Other Seminars

Self Study Courses

Online CPE web sites

Conferences

Other: