

Monday, June 10 2019

6/10 8:00AM-12:00PM

ENG19101. Best Practices in Firm Management (PST, FMA)

Ann White - *Human Resources Regional Manager, BDO USA*

Roman H. Kepczyk

Bill Pirolli

Join Bill Pirolli, CPA and other leading practitioners and consultants for a deep dive into the best practices in Firm Management. Topics will include the People, Processes, Clients and Financial Management attributes of highly successful firms.

Well managed highly profitable firms are not born, they are made. Learn about current trends in finding and keeping qualified staff, current and future trends in technology, processes and automation, growing and retaining your client base and how having good financial processes and accountability can lead to higher profits.

This pre-conference workshop will include takeaways that you can implement right away in your own firm. Bring your challenges and successes to share with your peers in round table discussions.

Learning objectives:

- 1) Learn the best practices in Firm Management
 - 2) Discover how you can create a future ready profitable firm
-

6/10 8:00AM-12:00PM

PST19101. Blockchain

Amy Vetter - *President, QuickStart Training Inc*

Amanda Weston - *Consultant, Boomer Consulting, Inc*

6/10 8:00AM-12:00PM

PST19102. How to Build a Cybersecurity Advisory Practice

Jim Bourke - *Partner, WithumSmith+Brown*

Steve Ursillo - *Partner, Cherry Bekaert, LLP*

In this session, the attendee will learn how to monetize their practice from a cybersecurity perspective. The presenters will share best practices in this space, including how to identify and offer cyber advisory and attest services. Both presenters have years of experience in this space, providing these types of services to their clients.

Learning objectives:

- 1) Obtain knowledge on how to monetize cybersecurity services in the CPA firm
 - 2) Obtain best practices on selecting which cybersecurity services to offer
-

6/10 1:30PM-2:45PM

ENG19K01. The Fat Tail: The Power of Political Knowledge for Strategic Investing

Ian Bremmer - *President & Founder, Eurasia Group*

The fallout from the still-unfolding global financial crisis provides several perfect examples of "fat tail" risk, those that flow from the low-probability, high-impact events that generate upheaval more often than we think. Bremmer shares with audiences how an understanding of the political dynamics generated by the financial crisis helps us forecast market risks, why politics matter more than ever for market performance, why the world's wealthiest countries have begun to behave like emerging market states, and what all this means for investors and companies.

At this presentation audiences will learn:

- 1) The risks that flow from low-probability, high-impact events...like the global financial crisis
 - 2) Why politics matter more for the performance of markets and for issues ranging from defaults to nationalization to regulatory reforms
 - 3) Why developed states are behaving more like emerging markets
 - 4) The shift from New York, Shanghai, and Mumbai to Washington, Beijing, and Delhi—and the risks that this trend creates
-

6/10 4:50PM-6:05PM

PST19103. PCPS Roundtables

Carl Peterson - *VP - Small Firms, Association of International Certified Professional Accountants*

Lisa Simpson - *Associate Director, Firm Services, Association of International Certified Professional Accountants*

Cari Weston - *Director, Tax Practice & Ethics-Tax Section, Association of International Certified Professional Accountants*

PST19104. Small Client Accounting Services*Samantha Mansfield - Director, Professional Development & Community, CPA.com*

Tuesday, June 11 2019

6/11 8:00AM–9:15AM

PST1901. Practitioners Kickoff*Mark Koziel - Executive Vice President – Public Accounting, Association of International Certified Professional Accountants*

6/11 8:00AM–9:15AM

PST1902. Tech Update

What to do? What to buy? What to watch for? What to avoid? Get your answers in Tech update where you will learn about who offers reliable solutions and what is changing the market. Specific topics included in this session are: technology trends, recommended hardware specifications, applications and licensing, and security. This session provides concentrated exposure to technology that may reveal ideas, trends, and options that you had not discovered through your normal channels.

Learning objectives:

- 1) Describe an optimum computer configuration for an accounting professional
- 2) Identify a new Microsoft product that covers licensing for desktop operating systems and Office
- 3) Specify a business case data compliance
- 4) List three protection tools to use while connected to the Internet

6/11 9:30AM–10:20AM

PST1904. The Dark Web: Do you Know Who's Watching*Ted Ross*

6/11 9:30AM–10:20AM

PST1905. Not just CAS - Advisory Services in all Practice Areas

6/11 9:30AM–10:20AM

ENG1906. How to Say Anything to Anyone (PST, EDG, FMA)*Shari Harley*

6/11 9:30AM–10:20AM

PST1903. KPI / KRI Technologies*David Kovar*

6/11 11:20AM–12:10PM

ENG1909. Uncovering Unconscious Bias (EDG, PST, AAM)*Lindsay Stevenson - Vice President - Finance & Tax, 1st Financial Bank USA**Rebekah Brown - Director of Development, MACPA/BLI*

Is unconscious bias hindering you, your team or your organization? Unconscious bias is bias that happens automatically. It is triggered by our brain making quick judgments and assessments of people and situations based on our background, cultural environment and personal experiences. Have you ever arrived home from work and don't remember the drive at all? Or perhaps you moved, but drove to the old house on your way home. Once neural pathways are formed, like your daily commute, they become almost automatic. We don't spend time thinking about each turn on the way home, our body just does it. While this can be helpful for remembering your route home, it can be detrimental in other areas of our lives. In this session we will explore these biases, how they might be hurting, us, our team and our organization and what we can do to create new neural pathways and combat unconscious bias.

Learning Objectives:

- 1) Define unconscious bias Identify the unconscious biases that might be driving you
- 2) Create an action plan to combat the unconscious biases in you, your team and your organization

6/11 11:20AM–12:10PM

ENG1910. GDPR - An Increase in North America Privacy - Are you in Compliance? (PST, AAM)*Thomas Patterson - Senior Director, NTT Data Services, Inc.*

6/11 11:20AM-12:10PM

PST1906. Most Profitable Niches and How to Build One

Allan Koltin

This session will discuss how to build and grow a profitable niche within your firm. As part of the presentation Mr. Koltin will discuss the following:

- How to identify the right champion to lead the practice.
- How to determine what core competencies are necessary for a successful practice.
- How to develop a standard process for performing the work.
- How to recruit, retain and grow talent within the niche.
- How to price your services within the niche.
- How to market and grow the consulting niche.
- How to leverage the niche within the greater accounting firm.

Mr. Koltin will draw on real world experiences, as well as share success stories of other firms around the country that have built success industry and service-line niches.

Learning objectives will include:

- 1) How to build a successful niche practice
- 2) How to ensure that your niche practice is profitable

6/11 11:20AM-12:10PM

PST1907. The Mobile CPA: What's in My Bag

Marc Staut

6/11 11:20AM-12:10PM

PST1908. BYO (Build Your Own) CAS Tech Stack

6/11 1:25PM-2:40PM

PST1909. Attracting and Developing Non-Accounting Professionals

Sandra Wiley

6/11 1:25PM-2:40PM

PST1910. M & A

6/11 1:25PM-2:40PM

PST1911. AI of the Future

6/11 1:25PM-2:40PM

PST1912. Small Firm Technology

What strategies can help your firm today and tomorrow? What technologies can support those strategies? The latest audit and tax technologies – in addition to niche areas such as collaborative accounting, payroll, and SALT – are covered in this session. You will also learn about supporting technologies such as practice management, document management, workflow, portals, eSignature, and email encryption. Come with your questions and expect to get insights on technologies that make public practice accounting better!

Learning objectives:

- 1) List three applications required for running a public practice firm
- 2) Differentiate between cloud opportunities
- 3) Identify niche opportunities for your practice
- 4) List examples of technologies that reduce firm risk

6/11 1:25PM-2:40PM

PST1913. Managing Risk Advisory Service

6/11 3:40PM-4:30PM

PST1916. Partner Succession: Planning a 3 Year Approach to Retirement

Jeremy Clopton - Director, Upstream Academy

6/11 3:40PM-4:30PM

PST1914. Rise of the Robo Accountant

Marc Staut

6/11 3:40PM-4:30PM

ENG1913. Part 1: Fundamentals of Blockchain (PST, NAA)

6/11 3:40PM–4:30PM

ENG1914. New To Firm Management (FMA, PST)

Stacey Hekkert - *Managing Partner & President, Anton Collins Mitchell LLP*
Kristen Holthus

6/11 3:40PM–4:30PM

PST1915. Managed Services Panel: Tips, Pitfalls, and Best Practices From the Field

6/11 4:45PM–6:00PM

PST1917. Practical Approaches to Managing Change In Your Firm

6/11 4:45PM–6:00PM

PST1919. How Ideas Spread: Kickstarting Technological Change within Your Firm

6/11 4:45PM–6:00PM

ENG1916. Part 2: What's Next for Blockchain? Smart Contracts, Decentralized Applications & Self Sovereign Identity (PST, NAA)

Amanda Weston - *Consultant, Boomer Consulting, Inc*

6/11 4:45PM–6:00PM

PST1918. Excel for Fraud

Carlton Collins - *Editor, ASA Research*

In this session, participants will learn several ways to use Excel to help detect and prevent fraud, including working with random numbers, applying Benford's Law, and cleaning general ledger data so it can be pivoted and analyzed in detail. The goal is to provide CPAs with guidance for testing data for authenticity and reasonableness. Don't miss this unique opportunity to learn more about Excel from this unique and interesting perspective.

Learning objectives:

- 1) Provide guidance for testing data for authenticity and reasonableness
 - 2) Provide a guideline for using Excel to test data for the potential of Fraud using Benford's Law
 - 3) Provide guidance for preparing a general ledger report for pivoting in Excel
 - 4) Provide guidance in producing random numbers to be used in selecting data for statistical analysis and other data procedures
-

6/11 4:45PM–6:00PM

ENG1917. Communicating Value and Pricing to Clients (PST, AAM)

Michelle Golden - *President, Fore LLC*

Experience The Power of Pricing in Advance. In this practical, information-packed session, unpack three big concepts within Michelle's advanced Pricing Methodology(SM). Learn the rationale behind each, then discover multiple ways to leverage the power of pricing to improve growth, elevate your worth, and deepen customer loyalty.

Key Concepts:

- Why & How to Provide Certainty in Price
- Ways to Better Understand the Customer
- Customer-Centric Positioning for Max Effectiveness

Attend this session and gain competitive advantage:

- 1) Explore the psychological and financial benefits when you provide tiered, 3-option pricing in advance
 - 2) Learn how to bring more impactful, truly holistic approaches (can you say effective cross-selling?) without being pushy
 - 3) Discover how to break out of the "just a vendor" role to be a true business-advisor role from day 1 of a client relationship
-

Wednesday, June 12 2019

6/12 8:00AM–9:15AM

ENG19K02. Professional Update

Barry Melancon - *CEO, Association of International Certified Professional Accountants*
William Reeb - *CEO, Succession Institute, LLC*

6/12 9:40AM–10:30AM

ENG19K03. Leading Through Organizational Transformation — A Conversation With Simon Sinek

Simon Sinek - *Author & Speaker*

6/12 11:30AM-12:45PM

PST1923. Panel: How Not To Get Fired By Clients

6/12 11:30AM-12:45PM

PST1920. Firm Profitability

Bill Pirolli

6/12 11:30AM-12:45PM

PST1921. Future Tech (non-CPA)

Dwayne Bragonier - *Founder, BAI Bragonier & Associates Inc.*

6/12 11:30AM-12:45PM

PST1922. Technology Budgeting: A New Hierarchy to Reduce Technical Debt and Support Innovation

Amanda Weston - *Consultant, Boomer Consulting, Inc*

6/12 11:30AM-12:45PM

ENG1920. Engaging NextGen Clients (PST, AAM)

Jennifer Wilson

6/12 1:55PM-2:45PM

ENG1923. Tax Disruption - Navigating the Future of Tax Technology (TAX, PST)

6/12 1:55PM-2:45PM

PST1924. Panel: A Seat at the Table - Why You Need More than Accountants

Jim Boomer - *CEO, Boomer Consulting, Inc.*

6/12 1:55PM-2:45PM

PST1925. Preparing for SUT Updates with Technology

6/12 1:55PM-2:45PM

PST1926. Business Case for Diversity

Yasmine El Ramly
Jacquelyn Tracy

6/12 1:55PM-2:45PM

PST1927. Hot Topics in Today's Small Firm Environment

Carl Peterson - *VP - Small Firms, Association of International Certified Professional Accountants*

6/12 3:00PM-3:50PM

PST1929. Leveraging Infrastructure as a Service to Build a Nimbler More Resilient Firm

Sean McLean

Is your organization still struggling with on premise technology infrastructure? Paying for Server and Network upgrades every 3 to 5 years? Infrastructure as a Service (IaaS) might be a solution. Attend this session to learn about the major vendors (Azure, Amazon, Hybrid) in the space, but also learn about the process our firm adopted and how you might use the lessons learned to your advantage. We will also focus on updated trends in IaaS and take your questions on the subject.

Learning objectives:

- 1) Learn about vendor comparisons and SWOT analysis in the IaaS space
 - 2) Learn about the process, budget, and partners a firm can leverage to make the migration from on prem to IaaS or hybrid
-

6/12 3:00PM-3:50PM

PST1930. Anti-Fraud Programs: Anomaly Detection Using Data Analytics

Mark Mayberry

Take a closer look at data analytics with this presentation on anomaly detection. Methodologies for discovering potential indicators of fraud are outlined. Fraud examples will be discussed.

Learning objective:

- 1) Discover the top fraud risk areas in financial reporting
 - 2) Learn how to effectively utilize data analytics to detect anomalies as potential indicators of fraud
-

6/12 3:00PM-3:50PM

ENG1925. Enhancing Attest Workflow Beyond Digitizing (PST, NAA)

6/12 3:00PM–3:50PM

ENG1926. Leading Digital Transformation (PST, EDG)

Dan Griffiths - Partner, Tanner LLC

Digital transformation is not about technology; it's about people and change management. Younger CPAs are uniquely positioned to lead that change. In this session we'll discuss practical examples of CPAs that have built coalitions of support for digital transformation within their organizations. You'll leave with the beginnings of a plan to take back to your office and begin building support for leveraging the digital opportunities that are sweeping across every organization on the planet.

Learning Objectives:

- 1) Learn how to go about building support for digital transformation within a team or organization.
- 2) Develop a plan to go about leading digital transformation for their current team or organization.

6/12 3:00PM–3:50PM

PST1928. PCPS Tools for Mentoring

Lisa Simpson - Associate Director, Firm Services, Association of International Certified Professional Accountants

Matthew Wilson - Shareholder, Wilson Ivanova CPAs

6/12 4:50PM–6:05PM

ENG1927. SOC CyberSecurity (PST, NAA)

In this session, Jim will overview the AICPA's new SOC for Cybersecurity offering. He'll share basic concepts of the offering as well as the differences between this service offering and the other existing SOC offerings.

Jim will cover everything from basic framework to sample report preparation and share sample deliverables and tools with the group.

Learning objectives:

- 1) Gain an understanding of the new AICPA SOC for Cybersecurity service offering
- 2) Understand the basics associated with reporting in this space
- 3) Understand the differences between the various SOC service offerings

6/12 4:50PM–6:05PM

ENG1929. Inspector Gadget (PST, PFP)

David Cieslak

Thursday, June 13 2019

6/13 7:00AM–7:50AM

PST19ER02. Hot Topics in Practice Management

Lisa Simpson - Associate Director, Firm Services, Association of International Certified Professional Accountants

6/13 7:00AM–7:50AM

PST19ER01. Tax Season Debrief

DeAnn Hill
Mike Shost

6/13 8:00AM–9:15AM

ENG19K04. Stress-Testing America's Prosperity

Zanny Minton Beddoes - Editor-In-Chief, *The Economist*

For years, America's economy has led the rest of the developed world, but will the U.S. remain the global dynamo or is the country's ongoing recovery built on an unsustainable pile of debt? Minton Beddoes examines the economic outlook from American and global perspectives, offering up-to-the-minute insight on policy-makers' priorities and expertise on the likely direction of issues, ranging from job creation to the deficit's effect on global interest rates to potential financial regulation.

6/13 9:30AM–10:45AM

PST1931. Where to Find Potential Hires in the Electronic Age

Renee Moelders

6/13 9:30AM–10:45AM

PST1932. Holy Engagement Letters Batman!

6/13 9:30AM–10:45AM

PST1933. Virtual Offices & Remote Workers

Jim Boomer - CEO, Boomer Consulting, Inc.

6/13 9:30AM–10:45AM

PST1934. An Overview of Leading Audit Tools

Stephanie McCasland

6/13 9:30AM–10:45AM

PST1935. Do You Practice What You Preach? Using Technology to Manage Financial Information

6/13 11:15AM–12:05PM

PST1938. Microsoft Team Based Collaboration - The Microsoft Way of the Future

Dan Krishman

6/13 11:15AM–12:05PM

PST1939. Transcending Technology: How to Ensure Competitive Advantage

Donny Shimamoto - Managing Director, IntrapriseTechKnowlogies, LLC

Innovations in accounting are on the horizon: artificial intelligence, blockchain, big data, and many more. What do accountants and tax advisors need to do to be ready for these innovations? Attend this thought-provoking session to look at the impact of these emerging technologies and identify what you and your teams need to do NOW to start getting ready for the changes that are coming and ensure your firm has a competitive advantage.

Learning objectives:

- 1) Identify the human factors that enable competitive advantage for tax accountants
 - 2) Identify professional development needs to be ready to leverage emerging technologies
 - 3) Understand existing innovations and identify those that may add value to your firm's services
-

6/13 11:15AM–12:05PM

PST1940. How the Firm of Tomorrow is Using Data Today

6/13 11:15AM–12:05PM

PST1936. Panel: Working in the Cannabis Industry (Is Your Firm Going to Pot?)

6/13 11:15AM–12:05PM

PST1937. Time Management for Accountants

Gail Perry

6/13 1:15PM–2:30PM

PST1941. 2018 PCPS MAP Survey Results

Carl Peterson - VP - Small Firms, Association of International Certified Professional Accountants

6/13 1:15PM–2:30PM

PST1942. RPA and AI: Use Cases for CPA's

6/13 1:15PM–2:30PM

PST1943. Office 365 - The Lesser Known Apps

Gerry Wilton

6/13 1:15PM–2:30PM

PST1944. Effective Strategies to Secure and Retain Top Talent

6/13 1:15PM–2:30PM

ENG1931. Are You Running Your Business or is it Running You? (EDG, PST)

6/13 2:45PM–4:00PM

PST1945. Roundtable Discussions: HR

Renee Moelders

6/13 2:45PM–4:00PM

PST1946. Roundtable Discussions: TECH

6/13 2:45PM–4:00PM

PST1947. Starting Your Analytics Journey ? What You Need to Know to Ensure Success

Erick Kirchner

6/13 2:45PM-4:00PM

ENG1932. What is the Purpose of a CRM and Can't I Find the Right One? (PST, AAM)

6/13 2:45PM-4:00PM

PST1948. Ask The Tech + Expert

Jim Bourke - Partner, WithumSmith+Brown

Dwayne Bragonier - Founder, BAI Bragonier & Associates Inc.

Donny Shimamoto - Managing Director, IntrapriseTechKnowlogies, LLC

Steve Ursillo - Partner, Cherry Bekaert, LLP

Amy Vetter - President, QuickStart Training Inc

Amanda Weston - Consultant, Boomer Consulting, Inc

6/13 2:45PM-4:00PM

ENG1933. Roundtable Discussions: BUSINESS DEVELOPMENT (PST, AAM)

6/13 4:15PM-5:05PM

ENG1935. Mindful Technology: Embracing Technology, Innovation and Mindfulness to Create Greater Human Connections (PST, AAM)

Amy Vetter - President, QuickStart Training Inc

Embracing new technology, will not isolate people or make us irrelevant as some fear. Instead, when used correctly and ethically, technology can empower leaders and employees to create stronger business relationships. Learn how to leverage technology to tap back into your purpose and creativity, become more mindful and empathetic as leaders and communicators, and create a greater sense of work-life harmony.

In this presentation, you will:

- 1) Unlearn the routines of the past by embracing technology and learning how it's currently being incorporated and connecting people in business and improving company culture
 - 2) Tap into self-discovery and mindfulness techniques to feel more fulfilled in the work you do
 - 3) Learn how to let technology do the heavy lifting so you can dedicate more time to developing the soft skills necessary to create a collaborative and lasting relationship with your employees and your customers
-

6/13 4:15PM-5:05PM

PST1949. Moving to a Virtual Audit

6/13 4:15PM-5:05PM

ENG1934. Reimagining Cross-Selling as Cross-Solving (PST, AAM)

Carrie Steffen - President, Co-Founder, The Whetstone Group
