

Saturday, June 8 2019

6/8 7:00AM–6:00PM **Registration Open**

6/8 12:30PM–6:00PM **PFP19101A. Building a Tax and Financial Planning Advisory Business Workshop - Day 1**

Sunday, June 9 2019

6/9 7:00AM–6:00PM **Registration Open**

6/9 1:00PM–5:00PM **PFP19102. PFP Workshop To Be Announced**

6/9 1:00PM–5:00PM **NAA19101. FASB ASC 606: Mastering the Mechanics**

Lynford Graham - *Visiting Professor, Bentley University*
Tom Groskopf - *Technical Director - CPEA, AICPA*

Top impact areas of the revenue standard (FASB ASC 606) will be explored in depth. Lessons and insights from organizations already implementing FASB ASC 606 will be leveraged to provide attendees with practical advice on complying with the more relevant aspects of the revenue standard. Case studies and examples will be extensively employed to illustrate key principles and concepts. In addition, relevant audit considerations at the risk assessment, performance, and evaluation phases of the audit will be covered.

Learning objectives:

- 1) Gain a deeper comprehension of and ability to implement key FASB ASC 606 principles and concepts
 - 2) Learn best practices for auditing the implementation of FASB ASC 606
-

6/9 1:00PM–5:00PM **EST19101. Basic Estate Planning**

Paige Goepfert - *Director, Andersen Tax LLC*
Missia Vaselaney - *Attorney, Taft Stettinius & Hollister, LLP*
Gary Zwick

6/9 1:00PM–5:00PM **EST19102. Basic 1041 and Trust Accounting Income**

Steve Siegel - *President, The Siegel Group*

This session will address the preparation of IRS Form 1041 (Fiduciary Income Tax) and will describe how the Form is completed to report the income and deductions of trusts and estates. Discussion will include the distinctions between trust accounting income and principal and will highlight how the 2017 Tax Cuts and Jobs Act has impacted the income taxation of trusts and estates.

Learning Objectives:

- 1) Gain an understanding of the detailed preparation of IRS Form 1041.
 - 2) Learn how to identify and distinguish trust accounting income and trust accounting principal.
 - 3) Determine the impact of the 2017 Tax Cuts and Jobs Act on the income taxation of trusts and estates.
-

6/9 1:00PM–5:00PM **PFP19101B. Building a Tax and Financial Planning Advisory Business Workshop - Day 2**

6/9 5:10PM-6:00PM

EST19103. What You Can Tell Your Clients About TCJA (Complimentary)

Lisa Featherngill - *Head of Legacy and Wealth Planning, Abbot Downing*

Robert Keebler - *Partner, Keebler and Associates, LLP*

Top tips from Paul Lee, Bob Keebler and Lisa Featherngill for advising clients about the opportunities and potential pitfalls arising from the new tax law.

Learning Objectives:

- 1) Participants will learn ideas for clients to manage income taxes under the new law.
- 2) Participants will learn ideas for clients to utilize the temporarily doubled gift/estate/GST exclusion under the new law.

6/9 5:10PM-6:00PM

PFP19103. Town Hall

6/9 6:00PM-7:30PM

Welcome Reception

Monday, June 10 2019

6/10 6:30AM-7:00PM

Registration Open

6/10 7:00AM-7:50AM

EST19ER01. Running the Numbers

Steve Bigge

6/10 7:00AM-7:50AM

NAA19ER01. Protecting the Privacy of Critical Data

Thomas Patterson - *Senior Director, NTT Data Services, Inc.*

An organization's data is oftentimes thought of as its most valuable asset, yet many entities struggle when it comes to protecting that data. This is especially true when it comes to the personally identifiable data of customers, trading partners, and employees. This session will explore the topic of data protection and provide attendees with a greater appreciation of the potential difficulties one may encounter when attempting to create a data protection strategy, data handling procedures, control activities, and the types of technical tools available in the market about which CPAs should be aware.

Learning objectives:

- 1) Leave participants with an in-depth understanding and increased appreciation of the challenges organizations face when designing and implementing a robust data protection strategy and methods
- 2) Provide participants with recommended steps for identifying an organization's critically important and most valuable data, identifying the types of controls that can help protect the integrity and privacy of that data, and technologies available in the market that can help prevent and detect data breaches and related data losses

6/10 7:00AM-7:50AM

NAA19ER02. CECL Implementation

Barry Pelagatti - *Partner, RKL LLP*

This session will provide an update on the status of CECL, and the evolving best practices related to the implementation, integration and internal control being utilized to achieve a proper transition from current GAAP to the new standard.

You will receive critical information related to:

The necessary team members that need to be involved; impact in your internal controls; critical elements when using a third party; and how to discuss the new model with your auditors.

Learning objectives:

- 1) Achieve a better understanding of the various methodologies in place under the new guidance
- 2) Achieve a better understanding of how the new CECL model can impact your ICFR environment for SOX purposes

6/10 7:00AM-7:50AM

PFP19ER01. Session Topic To be Announced

6/10 7:00AM-7:50AM

PFP19ER02. Alternative Fee Structures

6/10 7:00AM–7:50AM

PFP19ER03. Developing a Sound Investment Policy for Your Client

6/10 7:00AM–8:00AM

Continental Breakfast

6/10 7:50AM–8:00AM

Transition Break

6/10 8:00AM–9:15AM

EST1901. Estate Planning Update

Andy Katzenstein

6/10 8:00AM–9:15AM

NAA1901. AICPA Professional Update

Sue Coffey - *Executive Vice President, AICPA*

6/10 8:00AM–9:15AM

PFP1901. Economic Update

Anirban Basu

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
-

FMA19101. Talent Management Workshop: Evaluate and Build/Update Your Organization's Talent Management Plan

Jeremy S. Wortman

Most accounting firms (and all businesses in general) have a clear understanding and plan for their operational strategy. However, when asked if they have a clear strategy regarding their human capital more than 80% say they have "no plan" or "very little of a plan" (e.g., they may have a staffing plan or do some sort of succession planning). Yet, when asked how important their people are to the ongoing, long-term success of their business the overwhelming response is, "critically important." Thus, there is a large disconnect between the practice of talent management and its idealized state. Accordingly, this session helps organization leaders understand the the robust nature of talent management and how they can begin thinking and creating a more strategic approach to the acquisition, engagement, development, and retention of their most valuable asset – their people. During this session participants will explore a framework that they can use to immediately begin assessing their own organization in terms of talent management without over-engineering the process. Participants will be intellectually stimulated to think about the people-side of their business in a more comprehensive and deeper manner; thus, positioning themselves to identify areas of enhancement that drives their operational strategy. The final product of this workshop will be a completed audit of your firm's talent management practices and recommended action plan to be presented to your firm's most senior leaders.

Learning Objectives:

- 1) Discover a Talent Management framework that facilitates a deeper and more comprehensive analysis of your organization's human capital
- 2) Explore why, and how, hiring the right person (i.e, talent acquisition) the first time using validated instruments increases productivity and drives employee retention – as well as how bad hires waste money
- 3) Once the right person is hired, we explore how to get them engaged (i.e., talent engagement) so that they work hard for you, get along with others, and become loyal (which mitigates turnover)
- 4) Once you hire the right person and then get them engaged, you will explore ways to develop (i.e., talent development) your people so that they can build their talents into strengths and apply them to the job – this is the number one driver of employee retention
- 5) Explore what it means to leverage talent – this domain of talent management involves career pathing, succession planning, mentoring etc. which allows your organization to maximize its collective talent
- 6) Identify how all of the collective domains of talent management drives talent retention – which not only saves money but headaches as well identify various tools that are readily accessible to support the analysis and practice of all talent management domains

6/10 9:15AM–9:30AM

Transition Break

6/10 9:30AM–10:45AM

EST1902. Planning for the Non-Taxable Estate

6/10 9:30AM–10:45AM

NAA1902. ASB Update

6/10 9:30AM–10:45AM

PFP1902. Retirement Assumptions

6/10 9:30AM–10:45AM

PFP1903. Financial Planning Software

6/10 9:30AM–10:45AM

PFP1904. 529s Planning

6/10 9:30AM–10:45AM

PFP1905. Session Topic To be Announced

6/10 9:30AM–10:45AM

PFP1906. Panel Perspectives - The Tax CPA, the RIA CPA, and the Insurance Broker CPA

6/10 10:45AM–11:15AM

Networking Break

6/10 11:15AM–12:05PM

EST1903. Basic 706 Preparation: Common Errors

Mary Kay Foss - *Owner, Mary Kay Foss CPA*

Donita Joseph

6/10 11:15AM-12:05PM

EST1904. Decanting

Kristen Simmons - Member, Oshins & Associates LLC
Courtney McCandless - Attorney, Oshins & Associates,LLC
Heidi Freeman - Member, Oshins & Associates,LLC

In the Decanting Session, the speakers will discuss how to utilize decanting to make trusts more efficient for creditor, estate and income tax purposes. Specifically, the speakers will discuss trust design that is most advantageous for creditor, income tax and estate tax protection, and how an otherwise irrevocable trust can be improved through decanting.

Learning Objectives:

- 1) Review the process of decanting and different state law approaches to decanting
- 2) Review what can and cannot be accomplished through decanting depending on state law.
- 3) Review optimal trust design for creditor, income tax and estate tax purposes
- 4) Review decanting case studies.

6/10 11:15AM-12:05PM

NAA1903. Independence Considerations and the Implementation of ASC 606

6/10 11:15AM-12:05PM

NAA1904. Business Combinations: Accounting and Auditing Issues

6/10 11:15AM-12:05PM

NAA1905. Peer Review - Part 1

Frances McClintock - Assoc Director- Peer Review Program, AICPA
Andrew Pope - Partner, Grant Thornton LLP

This session is Part 1 of a two-part session series. These sessions, which qualify for the ongoing Team/Review Captain training requirement, will cover recent changes to peer review guidance, peer review resources and other related developments.

Learning objectives:

- 1) Obtain an understanding of recent and upcoming changes in the peer review program guidance
- 2) Obtain an understanding of the current enhancing audit quality initiative areas of focus

6/10 11:15AM-12:05PM

ENG1901. Estate Planning for IRAs (EST, PFP)

6/10 11:15AM-12:05PM

PFP1907. Successes and Failure with Mergers

6/10 11:15AM-12:05PM

PFP1908. Why Trusts

6/10 11:15AM-12:05PM

PFP1909. Latest Research on Risk Tolerance

6/10 11:15AM-12:05PM

PFP1910. P&C Insurance Review for the Financial Planner

Patti Clement - Senior Vice President, Hub International

As a financial planner, one of the many important aspects of a portfolio that needs to be addressed with care is making sure clients and their families are properly insured to protect their homes, cars, most prized possessions, and overall current lifestyle. During this session, Patti Clement, Senior Vice President of leading global insurance brokerage, HUB International, will review the latest trends in the personal insurance property and casualty market; how to work with your customers to ensure they have the right coverage to fit their unique needs; uncovering any hidden or commonly overlooked exposures; adapting to today's current landscape including erratic weather patterns, the Me Too movement and much more. Learning Objectives:

- 1) A detailed overview of commonly purchased lines of insurance coverage for individuals.
- 2) Current state of the insurance marketplace for personal lines.
- 3) Insight on commonly overlooked exposures. - Case study examples of how working with the right insurance broker can greatly benefit a financial planner and in turn their customers.

6/10 12:05PM-1:30PM

Networking Lunch

6/10 1:00PM-5:00PM

TAX19101. IRS WORKSHOP

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 2:45PM–3:45PM

Networking & Exhibit Hall Break

6/10 3:45PM–4:35PM

NAA1906. Accounting for Employee Compensation - Unique Awards

6/10 3:45PM–4:35PM

EST1905. Intra Family Loans and Notes

Jim Hogan

6/10 3:45PM–4:35PM

NAA1907. PEEC Update

Ellen Gorla

6/10 3:45PM–4:35PM

NAA1908. Panel: Special Purpose Frameworks

Mike Brand - *Partner, Johnson, Feigley, Newton & Brand, LLP*

Jeremy Dillard - *Partner, SingerLewak LLP*

Mike Glynn - *Senior Manager - Audit & Attest Standards, AICPA*

For many small- and mid-size entities, GAAP basis financial statements are not required and are often not the most relevant or cost-effective method of presenting financial information to users of the entity's financial statements. For these entities, the cash-basis, a modified cash-basis, the basis of accounting that the entity uses for tax purposes, or the AICPA's Financial Reporting Framework for Small- and Medium-Sized Entities is often the best financial reporting framework for their purposes.

The Panelists will discuss how CPAs should perform preparation, compilation, review, and audit engagements in accordance with Professional Standards on financial statements prepared in accordance with a special purpose framework and will take questions from participants.

Learning objectives:

- 1) Discuss the special performance requirements with respect to engagements to perform a preparation, compilation, review, or audit of financial statements prepared in accordance with a special purpose framework
- 2) Discuss the reporting requirements for compilation, review, and audits of special purpose financial statements

6/10 3:45PM–4:35PM

PFP1911. How to Motivate and Retain Talent

6/10 3:45PM–4:35PM

PFP1912. Comparison of ETFs vs Mutual Funds

6/10 3:45PM–4:35PM

PFP1913. Alternatives for LTC Options

6/10 3:45PM–4:35PM

ENG1902. Dealing with Grieving Clients (EST, PFP)

6/10 3:45PM–4:35PM

ENG1903. Roth Conversion After the TCJA (PFP, EST)

6/10 3:45PM–4:35PM

EST1906. To be Announced

6/10 4:35PM–4:50PM

Transition Break

6/10 4:50PM–6:05PM

EST1907. DNI Bootcamp

Jeremiah Doyle - Senior Vice President, BNY Mellon Wealth Management

6/10 4:50PM–6:05PM

NAA1911. Data Extraction and Analytics (introductory session)

Virginia Collins

6/10 4:50PM–6:05PM

NAA1912. Peer Review - Part 2

Frances McClintock - Assoc Director- Peer Review Program, AICPA
Andrew Pope - Partner, Grant Thornton LLP

This session is Part 2 of a two-part session series. These sessions, which qualify for the ongoing Team/Review Captain training requirement, will cover recent changes to peer review guidance, peer review resources and other related developments.

Learning objectives:

- 1) Obtain an understanding of recent and upcoming changes in the peer review program guidance
 - 2) Obtain an understanding of the current enhancing audit quality initiative areas of focus
-

6/10 4:50PM–6:05PM

PFP1914. Retirement Planning

6/10 4:50PM–6:05PM

PFP1915. Annual Technology Survey

6/10 4:50PM–6:05PM

PFP1916. Information-Based on Economic Cycle

6/10 4:50PM–6:05PM

PFP1917. Find Gold in Your Life Insurance Policy When You Sell Your Business

6/10 4:50PM–6:05PM

ENG1904. State Estate Issues (EST, PFP)

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

6/10 4:50PM–6:05PM

PST19104. Small Client Accounting Services

Samantha Mansfield - Director, Professional Development & Community, CPA.com

6/10 4:50PM–6:05PM

EST1908. Charitable Gifts of Business Interests

6/10 4:50PM–6:05PM

EST1909. Tax Planning for Annuities Including Post Mortem

6/10 4:50PM–6:05PM

NAA1909. Examples of Applying Topic 606 to Specific Cases

6/10 4:50PM–6:05PM

NAA1910. GASB Update

David Bean - Director of Research and Technical Activities, Governmental Accounting Standards Board

This session will address recently issued GASB Statements and Implementation Guides, focusing on major pronouncements and related implementation guides and major projects and research activities on the GASB's technical agenda. Topics to be covered include fiduciary activities and leases implementation issues; the financial reporting model; and revenue and expense recognition.

Obtain basic working knowledge of:

- 1) Changes introduced by recently issued pronouncements, including implementation issues
 - 2) Potential impact of GASB projects and research activities
-

6/10 5:10PM–6:00PM

TAX19102. INSIDE THE TAX STUDIO

Ted Sarenski - CEO, Blue Ocean Strategic Capital
Martin S Finn - Founding Partner, Lavelle & Finn, LLP

To Be Determined

6/10 5:30PM–7:30PM

Exhibit Hall Opening Reception

Tuesday, June 11 2019

6/11 6:30AM–7:00PM

Registration Open

6/11 7:00AM–7:50AM

NAA19ER04. Accounting Implementation Issues In Response to the 2018 Tax Law Change

6/11 7:00AM–7:50AM

PFP19ER04. HSAs

6/11 7:00AM–7:50AM

PFP19ER05. Integration of Behavioral Finance with Options

6/11 7:00AM–7:50AM

TAX19ER01. Comment Letters-Advocacy in Action

Dan Moore - Sole Practitioner, D.T. Moore & Company, LLC
Amy Wang - Senior Manager, Association of International Certified Professional Accountants

After this session, you will be able to:

- 1) Identify legislative and regulatory tax developments.
 - 2) Identify emerging tax policy and advocacy issues important to AICPA members.
 - 3) Understand how to develop comment letters and position statements on important advocacy issues.
-

6/11 7:00AM–7:50AM

ENG19ER01. Tax Planning for Cryptocurrency (TAX, PFP)

6/11 7:00AM–7:50AM

EST19ER02. AICPA Trust, Estate and Gift Tax Technical Resource Panel Update and Q&A

Mary Kay Foss - Owner, Mary Kay Foss CPA
Eileen Sherr - Senior Manager - AICPA Tax Policy & Advocacy, AICPA ENGAGE
Ted Batson - Partner/Tax Counsel, CapinCrouse LLP
Jennifer Einziger
Donita Joseph
Justin Ransome - Partner, EY
Peggy Ugent - Retired, Giordani, Swanger, Ripp & Jetel, LLP

This discussion covers AICPA tax advocacy efforts regarding legislative and regulatory proposals and developments in trust, estate and gift tax. The AICPA Trust, Estate and Gift Tax Technical Resource Panel (TRP) of experts will answer questions about the latest developments. Attendees will have the opportunity to exchange ideas with the TRP representatives and their conference peers.

Learning Objectives:

- 1) Become familiar with the latest developments and emerging issues in the trust, estate and gift tax areas,
 - 2) Learn what the AICPA is advocating for members with the IRS, Treasury and Congress in the trust, estate and gift tax areas,
 - 3) Learn about various legislative and regulatory proposals and the potential impact on one's practice in the trust, estate and gift tax areas.
-

6/11 7:00AM–7:50AM

FMA19ER01. The What of Professional Firm Management

6/11 7:00AM–7:50AM

FMA19ER02. Changes in How Learning is Done

Learning is a vital part of developing, retaining and growing our firms. We will discuss how the changes around us are impacting how we learn and discuss ways to adapt. We will feature firms' successes in this area.

Learning Objectives:

- 1) Review the science behind how we learn
- 2) Discuss the impact of technology changes Identify ways to become a self-directed learner Describe best practices of learning

6/11 7:00AM–7:50AM

NAA19ER03. Group and Component Auditor Issues

Stephanie Markert

6/11 7:00AM–8:00AM

Continental Breakfast

6/11 7:50AM–8:00AM

Transition Break

6/11 8:00AM–8:05AM

AAM1900. Welcome/AAM Summit Kick-off

6/11 8:00AM–9:15AM

EDG1901. Freedom to Fail

Kristen Rampe - *Owner, Kristen Rampe Consulting*

Would you believe that some professionals feel that if they make mistakes, it'll be held against them? You probably do. Have you thought about what effect that has on the functioning of your team and your organization as a whole?

In this session, we explore the concept of failure and research behind the traits that contribute to the highest levels of team effectiveness. You'll walk away with ideas on how you can measure and create an environment that fosters peak team performance and healthy communication.

Learning Objectives:

- 1) Explore the concept of failure and how our current failure assumptions can reduce success.
- 2) Learn the key traits in team effectiveness.
- 3) Understand how to measure and build psychological safety, creating a Freedom to Fail environment.

6/11 8:00AM–9:15AM

ENG1905. 199A (EST, PFP, TAX)

Robert Keebler - *Partner, Keebler and Associates, LLP*

6/11 8:00AM–9:15AM

FMA1901. Creating a Pathway for Your Technical People to Transform Into Advisors

William Reeb - *CEO, Succession Institute, LLC*

At a time when technology is automating much of the compliance function, globalization is delivering talent at pennies on the dollar, it is time for every CPA, not just the business development CPA, to do a better job of living up to our profession's mantra of being our clients Most Trusted Business Advisor. It no longer is enough just to deliver information about the past. We need to help our clients consider their past, their trends, their key operating statistics and use that information to help them bridge their organization's and themselves into a better, more profitable and sustainable future. This session centers on augmenting and/or refining the skills required to effectively deliver future focused facilitative/advisory services.

Learning Objectives:

- 1) Learn how to move from being an Expert to an Advisor
- 2) How to ask the kind of open-ended questions that promote the client expounding on issues beyond traditional accounting problems,
- 3) Improve your listening and communication skills,
- 4) Understand how to act in the role of your client's general contractor, and much more.

6/11 8:00AM–9:15AM

NAA1913. PCC Town Hall - Part 1 FASB Update

Jeremy Dillard - *Partner, SingerLewak LLP*

Michael Cheng

Marsha Hunt

Jim Kroeker

Jeffrey Mechanick

6/11 8:00AM–9:15AM

PFP1918. Session Topic To be Announced

6/11 8:00AM–9:15AM

PFP1919. Family Business Succession Planning

Amy Jucoski - *Managing Director, Legacy and Wealth Planning, Abbot Downing, Wells Fargo*

Nancy Amick - *Senior Director, Institute for Family Culture, Abbot Downing*

Family owned and operated businesses face unique challenges when preparing for and executing succession planning from one generation to the next. As family business owners contemplate passing the torch to the next generation, thoughtful preparation is key. The most successful businesses are proactive about identifying their future leaders and making an investment in their development. In this presentation, we will discuss current trends in succession planning, why it can be difficult to get started and best practices for engaging and preparing the next generation for increased responsibilities as part of a comprehensive approach to business transition planning. Learning Objectives:

- 1) Understand the unique opportunities and challenges faced by family business owners who are contemplating succession planning
 - 2) Provide best practices for engaging and preparing the next generation for increased responsibilities in the family business
-

6/11 8:00AM–9:15AM

PFP1920. Session Topic To be Announced

6/11 8:00AM–9:15AM

PFP1921. Longevity Annuities

Stuart Silverman - *Principal & Consulting Actuary, Milliman*

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 8:05AM–8:55AM

AAM1901. Curiosity: How to Stay Calm Amid Uncertainty

Matt Newman - *Consultant, The Frontier Project*

Initiate honestly. Respond without judgement. Build together without an end in sight.

These mindsets can get you back on track when new information arises to totally negate all your plans and assumptions. They can help you project presence and confidence in an uncertain situation. And they all come straight from the long tradition of improvisational performers—better known as improv comics.

The rate of change in today's workforce is increasing exponentially. Research indicates that modern companies go through substantial organizational changes every three years. The average workforce undergoes a complete turnover every eight years. The life-cycle of products and US patent filings is getting shorter. And all this increased speed is making itself felt in our everyday experience.

Matt will show you how using an improviser's iterative mindset can increase your tolerance for change, lead to more productive conversations, foster creative teams, and generally make you more comfortable and confident when you have no idea what will happen next.

Using lessons learned from nearly two decades performing in front of crowds without a script, Matt will share stories and inspiration from unusual places to awaken your own sense of curiosity about the changing world around you.

He's also going to ask someone from the audience to get on stage. You've been warned.

Initiate honestly. Respond without judgement. Build together without an end in sight.

Learn how using an improviser's iterative mindset can increase your tolerance for change, lead to more productive conversations, foster creative teams, and generally make you more comfortable and confident when you have no idea what will happen next.

6/11 8:55AM–9:05AM

AAM1902. State of AAM

Craig Browning - *Director of Marketing and Personnel, KWC Certified Public Accountants*

Jennifer Lemanski - *Senior Manager, PKF Texas*

AAM's President and President-Elect will recap the organization's accomplishments during the past year, introduce new board members and discuss initiatives for the year ahead with video highlights.

6/11 9:05AM–9:55AM

AAM1903. Inside the Mind of the Managing Partner: Marketing That Really Matters

Carl George - *CEO, Carl George Advisory, LLC*

As the CEO of Clifton Gunderson for 16 years, I was privileged to work with many partners and staff that understood the dynamics of marketing to our current clients, to prospective clients, and to clients that were previously lost. This session will focus on lessons learned and best practices in executing on those three dynamics. In addition, the session will address successful marketing training techniques for the rising staff stars in your firms.

Learning Objectives:

- 1) To obtain a clear understanding of the constant need to market to current clients, future clients, and to former clients.
- 2) To provide current successful marketing training techniques for the firm's staff.
- 3) To provide marketing lessons learned and best practices from the MP's perspective.

6/11 9:15AM–9:30AM

Transition Break

6/11 9:30AM–10:20AM

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

Shari Harley

6/11 9:30AM-10:20AM

EDG1902. Lose the excuses, reach the results!

Kelly Ward - *CPA, Robinson & Ward,PC*

Do you ever find that you've lost sight of your goals? Maybe what you really want just seems so far out of reach? Does your to-do list seem way too overwhelming? It is easy for us to put off today what we can get done tomorrow, but if we just took those next little steps along the way, how much closer could we be to our goals or accomplishing those big projects. This session helps you learn to get past the excuses and learn to turn goals and projects into more manageable tasks. From eating the frog to brain dumping, we will discuss ways to guide you to achieving more.

Learning objectives:

- 1) Learning tools to turn goals or projects into more manageable tasks and
- 2) Discussing ways to guide you to achieving more.

6/11 9:30AM-10:20AM

EST1910. Trust Situs

6/11 9:30AM-10:20AM

PFP1922. Psychology of Retirement

6/11 9:30AM-10:20AM

PST1903. KPI / KRI Technologies

David Kovar

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

TAX1901. IRS Controversies

6/11 9:30AM-10:25AM

NAA1914. PCC Town Hall - Part 2

Jeremy Dillard - *Partner, SingerLewak LLP*

Michael Cheng

Marsha Hunt

Jim Kroeker

Jeffrey Mechanick

6/11 9:55AM-10:20AM

AAM1904. How Much Should You Spend on Marketing: Results of AAM's 2019 Marketing Budget Survey

Lee Frederiksen - *Managing Partner, Hinge*

AAM partnered with the Hinge Research Institute to conduct their third bi-annual study of marketing budgets within CPA firms. In this session, the Managing Partner of Hinge Lee Frederiksen will uncover insights from the research, help attendees benchmark their marketing budgets against high-growth and average-growth firms, and provide guidance on building an effective marketing budget.

Learning Objectives:

- 1) Learn how high-growth and average-growth accounting firms budget marketing expenses.
- 2) Learn which marketing techniques are more effective for accounting firms
- 3) Benchmark your firm's marketing budget against high-growth and average-growth firms.

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

Networking & Exhibit Hall Break

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

AAM1906. Accountability and Consistency Developing and Executing on an Internal Sales Process

Dawn Howard - *Region Industry Development Leader, BKD, LLP*

This presentation will be focused on developing and executing on a strong sales pipeline process. The 'billable hours shield' is alive and well as it relates to the time our client service professionals are willing to put to their business development efforts. Key points of this presentation include setting up a consistent and efficient follow up plan with a focus on holding people accountable as they build their sales pipeline. This presentation will also discuss a methodology to limiting the number of key prospects per client service professional and an example of a marketing campaign and process utilized to improve your win rate.

After attending this presentation, attendees should be able to:

- 1) Assess their own current business development process and determine in what areas, as it relates to holding their client teams accountable, they need to tighten up the process.
- 2) In addition, attendees should recognize instances where it is time to escalate any concerns to their executive team.
- 3) Finally, attendees should be able to use the example of a marketing campaign and construct one of their own or infuse their own plan.

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

PFP1925. Private Client Investment Strategy Update

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

EDG1903. The Power of Focus

Michael Elliott - *Principal, DittrickCPA*

Sure, it feels great to be all things to all people, but is that the best way to really use your gifts and talents? Join Michael as he explores this topic and gives specific examples of wonderful success when he has chosen to specialize and tremendous failures when he has chosen to try to serve everyone in every way. This session will make a strong case for choosing to become a specialist in your firm, your hobbies and your life.

Learning Objective:

- 1) Understand the power of focus and what specializing can mean for you in your life and business.
- 2) Understand the process of beginning to focus in your life.

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

ENG1907. How to Move to a Zero-Tax State (TAX, PFP, EST)

Mark Klein - *Esquire, Hodgson Russ LLP*

The impact of the TJCA on the deductibility of state and local taxes has created an additional incentive for taxpayers in high-tax states to move to a low or no-tax state. This session will help participants to:

- 1) Identify the rules used throughout the United States to get a state to accept a taxpayer's change of residency;
 - 2) Discuss planning opportunities and traps for the unwary; and
 - 3) Understand the income and other tax implications of changing residency.
-

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

PST1908. BYO (Build Your Own) CAS Tech Stack

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

ENG1908. Life Insurance Planning Opportunities After the TCJA (EST, TAX, PFP)

Todd Steinberg

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

TAX1902. FACTA & FBAR

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

TAX1903. Schedule C Audit Issues

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

EST1911. Trusts and 199A

Jeremiah Doyle - Senior Vice President, BNY Mellon Wealth Management

Robert Keebler - Partner, Keebler and Associates, LLP

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

EST1912. CRT Compliance

Ted Batson - Partner/Tax Counsel, CapinCrouse LLP

This session will review key compliance considerations in the formation and administration of charitable remainder trusts. Topics will include suitability, selecting the proper CRT format, administration, and tax return preparation.

Learning Objectives:

- 1) Identify which CRT format is most suitable for a client;
 - 2) Apply compliance considerations to day-to-day CRT administration; and
 - 3) Explain the key components to properly preparing Form 5227
-

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

FMA1902. Sharpening Your Ethical Intelligence

Jeremy S. Wortman

This session is the third in a series of four. Our session takes a unique approach to discuss ethics in the accounting profession. We focus on the most critical, and often the most neglected, element of ethical decision-making, THE INDIVIDUAL. This session is designed to help the participant 1) learn about the defensive psychological processes (i.e., Rationalization and Social Desirability biases) that impede the ethical decision making process and 2) to build Moral Courage and Moral Resiliency which both enhance the ethical decision making process – collectively, these two very different approaches help to create strong ethical decision makers. During the session we review the ethical decision making process how the brain morally matures and the biggest myths associated with ethical decision making. Primary focus is then given to self-destructive thinking (which impedes ethical decision making) and is practiced by using accounting related case studies. The course content is later synthesized with the guiding principles of the Accounting profession. Additionally, the session provides the participant an overview of the current state of ethics in Corporate America to serve as a benchmark for both personal and organizational development.

Learning Objectives:

- 1) Review the Ethical Decision Making process, moral cognitive development, and the most common myths associated with ethical decision making
- 2) Become aware of counter-productive psychological processes that impede the ethical decision making process
- 3) Recognize the biases that we all fall victim to when confronted with a moral dilemma
- 4) Develop moral courage which helps stand up in accordance to one's moral compass even in the face of adversity so that ethical behavior actually occurs
- 5) Develop moral resiliency which helps bounce back from adversity and tough situations so that moral behavior is continued
- 6) Apply ethical decision making principles and moral intelligence to multiple case studies
- 7) Update regarding the ethical state of Corporate America
- 8) Synthesize the psychological processes with the AICPA code of conduct

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

FMA1903. Engaging All Generations in the Firm's Future

Jeremy Clopton - *Director, Upstream Academy*

As much as we'd like everyone to fit the same mold, the inescapable fact is that multiple workplace generations create multiple perspectives. Differences in views on flexibility in location, career path, schedule, and work style have created a very diverse workplace. The firm that can engage multiple generations and meet their needs will attract a wealth of eager applicants, foster a more productive environment and have a great pool of experiences, perspectives and talent to draw on. In this session, Jeremy will share how to find and tap into the potential of each generation so you can engage all generations in dealing with the changing landscape of modern business.

Learning Objectives:

- 1) Understand the foundations of beliefs for the generations in firms today.
- 2) Explain best practices for engaging multiple generations for firm growth.

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

NAA1915. Quality Control

Bob Dohrer - *Chief Auditor, AICPA*

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

NAA1916. FASB ASC 606 Implementation: Manufacturing Industry

Tom Groskopf - *Technical Director - CPEA, AICPA*

This session will cover aspects of the new revenue standard having the most impact and posing the most challenges in the manufacturing industry. Participants will gain practical knowledge about how to implement FASB ASC 606 in the manufacturing sector, aided by a liberal use of illustrations and examples. Key areas covered include accounting for change orders, contract costs, tooling and pre-production costs, timing of revenue recognition, variable consideration, applicability of series guidance, learning curve costs, sell-through method, and other topics.

Learning objectives:

- 1) Gain a deeper comprehension of the impact of FASB ASC 606 in the manufacturing industry
- 2) Gain a stronger ability to identify key impact areas of FASB ASC 606 in the manufacturing sector and how to apply the requirements of FASB ASC 606 to those areas

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

NAA1917. Artificial Intelligence in an A&A Practice

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

PFP1923. Topic to be Announced

Michael Kitces - *Publisher | Partner, Nerd's Eye View | Pinnacle Advisory Group*

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

AAM1905. Content for Conversion

Christine M Nelson - Senior Communications Consultant, Ingenuity Marketing Group, LLC

One of the hardest stages for content marketing is the Decision stage — actually converting visitors to take action on an offer or to request an RFP. This session will focus on strategies to improve conversion, including identifying the actions that you want visitors to take once they arrive at your site and the gaps you may have in your campaigns that fail to move potential clients from Awareness and Consideration to Decision. We will use examples of actual campaigns to help participants map out their own inbound marketing strategy for conversion, discuss follow-up touches that bring buyers back to the table, and determine when it's timely to have partners engaged in outreach and closing.

Attendees will leave with an inbound marketing strategy map that focuses on the right conversion tactics for their firm.

Deep dive and creation of content that applies to the conversion stage of inbound marketing

Fill gaps in the inbound marketing approach that support conversion and real prospects

Tie marketing efforts to conversion ROI to justify digital focus

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

PFP1924. Life Planning Tools

6/11 12:10PM-1:25PM

Networking Lunch

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

FMA1904. Strategic Planning or Vision

Jennifer Wilson

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

NAA1918. Audit Documentation

Liz Gantnier - Partner, DHG

Carl Mayes - Associate Director - CPA Quality and Evolution, AICPA

The AICPA Peer Review Program is detecting high levels of non-conformity with professional standards, and this session will address one of the most common causes: non-compliance with AU-C Section 230, Audit Documentation.

Learning objectives:

- 1) Learn about common misconceptions that are driving non-conformity
 - 2) Review the requirements of the Standard
 - 3) Walk through examples of real-world application
 - 4) Identify free resources that can help you and your firm
-

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

NAA1919. FAQs - Accounting

Mike Austin - CPA, Sr. Technical Manager, AICPA

Kristy Illuzzi - Senior Technical Manager, AICPA

In this session we will cover frequently asked questions coming through the Center for Plain English Accounting related to accounting and financial reporting, including FASB and special purpose frameworks.

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

NAA1920. Variable Interest Entities

Michael Cheng

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

PFP1926. Best Ideas for Retirement Panel

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

AAM1907. How to Conquer the Podcast Game: ENGAGE Your Audience & Invigorate Your Brand

Becca Davis - *Director of Practice Growth, Rea & Associates, Inc.*

In this session, attendees will learn how Rea & Associates developed an engaging, award-winning podcast -- before podcasting was cool. We'll cover how a podcast can help invigorate your brand, make your people famous, form meaningful conversations and build trust and credibility with the people you want to reach, and streamline your content strategy.

You'll learn how Rea launched its podcast, unsuitable on Rea Radio, and the lessons we learned along the way. We'll share our internal and external promotion strategy and the tools and equipment you need to get started. If you've been considering podcasting as a strategy, you don't want to miss this fun and engaging session.

The session will cover the how and why of starting a podcast and attendees will learn:

- 1) Why a podcast/selling to your firm
- 2) Pre-launch objectives
- 3) Launch date promotion
- 4) Keeping it fresh
- 5) Overcoming obstacles
- 6) Our top lessons learned
- 7) Using as a content hub
- 8) How we work smarter, not harder
- 9) Top tools/equipment used
- 10) Skill sets required

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

PST1911. AI of the Future

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

AAM1908. Party of One: Maximizing Your Impact as a Solo Firm Marketer

Anne Angera - *Director of Marketing, DunlapSLK*

Solo firm marketers are continuously pulled in many different directions, filling multiple roles and wearing many hats. Where should you focus your limited time and resources to maximize your impact for the firm? This session will help you think strategically to direct your talents to those areas that will yield meaningful results for firm management, enhance your visibility and credibility within the firm, and directly impact the firm's team members and bottom line. Sharing lessons learned from more than 26 years working as a solo firm marketer, along with best practices from other solo firm marketers and industry experts, the goal is for participants to leave this session with a renewed focus and a specific action plan geared toward activities yielding the greatest results.

Participants will learn how to apply strategic thinking to align their goals with those of firm management. Focusing on the AICPA's "Top Five Issues," participants will be provided with specific examples of how marketing can play a role in each of these areas. Sharing personal experiences and the experiences of others in the industry, the goal is for participants to leave with tangible ideas for programs and projects that can be tailored for their unique situations and help them directly impact their firms and, ultimately, their careers. Participants will learn how to think "big picture" and establish themselves as an important resource for their firms beyond the marketing function.

Key takeaways will be in the form of action plans and ideas for customizing and implementing at the participant's firm. This is a critical-thinking, idea-sharing, and problem-solving session geared toward generating thoughts on how to make examples and experiences shared work for everyone in their own unique situation.

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

AAM1909. Marketing and Sales: Two Disciplines, One Process

Daniel Scott Moore - *Shareholder & EVP, The Rainmaker Companies*

Thirty years ago, the AICPA revised its Code of Ethics to allow advertising, and accounting marketing was born. Ever since, firms have wrestled with how to link marketing investments to tangible sales results. Today we look across the industry and find no shortage of sophisticated marketers blazing trails. However, the challenge to align marketing and sales continues to perplex many growth leaders.

Most definitions of marketing and sales place one before the other in a continuum, rather than each in its own silo. There is a relay, although there isn't a distinct handoff. Rather, the two functions continually support each other. Herein lies the key to true integration: Align all marketing and sales roles and responsibilities along a single, unified client development process.

Participants will be provided with a 'Marketing and Sales Alignment Guide' with a summary of key points that can be used for future reference.

Participants will explore and learn:

- 1) the distinctions and connections between the marketing and sales functions
- 2) a five-phase client development process and the role of each function across the phases

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

PST1913. Managing Risk Advisory Service

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

EDG1904. Lovin' You: The Raw Truth About Fear and Self-Trust

Lindsay Stevenson - *Vice President - Finance & Tax, 1st Financial Bank USA*

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

TAX1904. Asset Protection

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

EDG1905. Courageous Authenticity

Joshua Lance - *Managing Director, Lance CPA Group*

Courageous Authenticity is the practice of leadership that is transparent, vulnerable, and honest with those we lead. It checks our egos at the door and through acts of mutuality and community, we can learn, lead and grow from each other. Becoming a leader in the CPA profession involves making the proactive decision to redefine and reshape the profession and lead those who come after us. Being courageously authentic shapes how we lead in a collaborative fashion that values each other and the culture we develop as a result. By attending this session, you will gain insight on the practice of Courageous Authenticity, how to change how you lead and bring those concepts back to your firm or company.

Learning Objectives:

- 1) Be able to understand the concept of Courageous Authenticity as a leadership principle
- 2) Apply this concept in leading others.

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

ENG1911. Planning for Clients with a \$2 million to \$22 million Estate (EST, PFP, TAX)

Steve Siegel - *President, The Siegel Group*

This session will address how persons not likely to be federal transfer taxpayers should address their income tax and estate planning issues. We will address basis planning, key decisions to be made with existing planning and why and how it may need to be changed. We will address whether existing trusts and wills should be modified, and consider what should be done with a client's life insurance and retirement plans.

Learning Objectives:

- 1) Gain a general understanding of the best planning considerations and decisions for persons not likely to be federal transfer taxpayers.
- 2) Review a variety of planning techniques highlighting the importance of income tax planning in today's environment.
- 3) Address specific suggestions to be addressed with clients to update and improve their planning decisions.
- 4) Focus on techniques to develop income tax basis enhancement strategies.

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

ENG1912. Portfolio Management for Non-Portfolio Managers (PFP, TAX)

6/11 1:25PM–2:40PM

EST1913. Trusts and Flow Through Entities

Paige Goepfert - *Director, Andersen Tax LLC*

In this intermediate/advanced session, attendees will learn about nuances related to a trust's investment in partnerships and S Corporations.

Learning Objectives:

- 1) Determine how to report a variety of tax items that are specific to ownership of partnerships and S Corporations in a trust setting.
- 2) Learn about estate planning techniques with trusts and flow-through entities.

6/11 1:25PM–2:40PM

EST1914. GST Tax Planning, Pitfalls & Pointers

Julie Kwon - *Partner, McDermott Will & Emery LLP*

A properly prepared and timely filed gift tax return that reports transfers, allocates GST exemption and makes relevant elections often effectuates or preserves intended GST tax planning. Conversely, oversights may preclude or undermine the plan and waste GST exemption. This program will provide practical guidance regarding preparation of the Form 709 and related notices of allocation and election statements to note common errors, recommend best practices and review options to address prior mistakes.

Learning Objectives:

- 1) GST tax rules governing allocations of GST exemption
- 2) Preparation of Form 709 gift tax returns and related GST elections.

6/11 2:40PM–3:40PM

Networking & Exhibit Hall Break

6/11 3:40PM–4:30PM

EDG1906. Thanks for the Feedback – Lessons in Giving and Receiving Feedback

Rebekah Brown - *Director of Development, MACPA/BLI*

Whether we realize it or not, we are constantly both giving and receiving feedback. We know that feedback is essential to our personal development, but we so often dread and even dismiss it. Feedback can be ill timed, unfair and downright mean, but that doesn't have to dictate our ability to use it for our own growth. Using lessons from the best-selling book, "Thanks for the Feedback" by Douglas Stone and Shelia Heen, learn the three types of feedback, the barriers to receiving good feedback and how we can be empowered to seek feedback for our own growth.

Learning Objectives:

- Identify the three types of feedback and the degree to which you need each one
- Recognize the barriers and blind spots that can get in the way of receiving feedback well
- Create an action plan for getting the feedback you need

6/11 3:40PM–4:30PM

TAX1907. IRS Due Diligence Requirements

6/11 3:40PM–4:30PM

EDG1907. Finding Your Unique Leadership Voice

Lori Liddell - *Senior Manager, HORNE LLP*

What type of leader do you aspire to be? Because all that you are and are not is best exemplified in your voice...but not your speaking style...the way you present yourself as a leader. Based on the book by Paul Larsen, attending this session will expose attendees to ways of developing their leadership voice, recognizing the voice that they already have and inspiring others to do the same.

Learning Objective:

- 1) Identify ways to develop and/or identify your unique leadership voice.
- 2) Find ways to help others develop their voice.
- 3) Determine when the voice needs to be adapted.

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

EST1915. Gift Tax Returns (Advanced Detail)

Jennifer Einziger

Justin Ransome - *Partner, EY*

6/11 3:40PM–4:30PM

EST1916. Business Succession Planning Part 1

Gary Zwick

David Johnson - *Senior of Counsel, McDonald Hopkins*

These Sessions examine critical elements of the succession plan, including:

- Preliminary planning considerations
- Ownership and management succession
- Key employee compensation
- Equalization among children
- Transferring the business and other assets
- Creative techniques
- Role of charitable giving/Insurance
- Balancing Income tax and transfer tax planning

Learning Objectives:

- 1) Examination of the preliminary planning considerations in developing a succession plan (that are often overlooked)
 - 2) Examination of non family key employee considerations and associated succession planning techniques, including compensation planning
 - 3) Examination of income and estate tax planning considerations and associated techniques to consider in succession planning
-

6/11 3:40PM–4:30PM

EST1917. Communicating the Estate Plan

Lisa Featherngill - *Head of Legacy and Wealth Planning, Abbot Downing*

Amy Jucoski - *Managing Director, Legacy and Wealth Planning, Abbot Downing, Wells Fargo*

It used to be sufficient to check beneficiary designations and titling of assets were consistent with the estate planning documents. With longer lives and the demand for more open communication from younger generations, communicating the estate plan is now essential. We will provide tips for having a successful meeting, what to disclose and how best to communicate the plan. Learning Objectives:

- 1) Understand the importance of communicating the estate plan for family harmony.
 - 2) Learn some ideas for effectively communicating the plan.
-

6/11 3:40PM–4:30PM

FMA1905. How to Use a Talent Assessment to Hire for Culture Fit

Jeremy S. Wortman

6/11 3:40PM–4:30PM

NAA1921. Auditing Accounting Estimates

Tracy Harding - *Principal, BerryDunn*

This session will provide attendees an update on recent and proposed developments related to standards for auditing accounting estimates.

Learning objectives:

- 1) To improve participants' ability to audit accounting estimates by better understanding the requirements of professional standards
 - 2) To help participants better understand recent and potential changes to those standards
-

6/11 3:40PM–4:30PM

ENG1915. New Qualified Opportunities Zone (TAX, EST)

Kelly Allen

6/11 3:40PM–4:30PM

NAA1922. Revenue Recognition: Healthcare

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

NAA1923. GAO Update Including Single Audit Quality

This session will focus on single audit quality and the most significant update made to the Government Auditing Standards (Yellow Book) in seven years. It will identify some of the more common single audit deficiencies identified in practice and tips for avoiding them. It will also address the major changes made by the GAO in the 2018 Revision of the Yellow Book and what you will need to know to prepare for implementation.

Learning objectives:

- 1) Provide information that will help you perform future Yellow Book audits in accordance with the 2018 Revision of Government Auditing Standards
- 2) Identify common single audit deficiencies and provide tips for avoiding them

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

TAX1905. Creepy Nexus

Mark Klein - *Esquire, Hodgson Russ LLP*

The rules that allow states to force an out-of-state business to pay its income tax and collect its withholding and sales taxes were dramatically changed in 2018. This session will:

- 1) Explore the impact of these rules on multistate businesses;
- 2) Provide some practical advice dealing with sales across state lines in a post-Wayfair world; and
- 3) Identify and discuss the tax implications created by employees who work in more than one state.

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

PFP1927. General Session - Topic to be Announced

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

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

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

PST1914. Rise of the Robo Accountant

Marc Staut

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

AAM1910. Driving Event Attendance

Ronelle Sellers - *Director of Marketing, Henderson Hutcherson & McCullough, PLLC*

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

AAM1911. Rise of the AI Marketing Machine - Driving Growth in Accounting Firms

Becky Livingston - *President & CEO, Penheel Marketing*

AI has made it possible for marketers to accomplish tasks they've been talking about for decades. In this presentation, I'll discuss how you can tackle three essential firm-growth goals, including marketing campaign performance, sales and revenue impact, and customer loyalty, using AI resources. Leveraging crowd-sourced knowledge, they'll be examples of how to increase efficiencies and to unify data from disparate sources, automate and future-proof data models for scale, and reduce optimization cycles.

Learning Objectives:

- 1) Identify AI tools to help you increase efficiencies within your firm and impact growth
- 2) Plan your strategic approach to tackle the three, essential firm-growth goals
- 3) Pinpoint crowd-sourced information to make informed decisions

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

AAM1912. Negotiate to Win

John Meislahn - *Director of Business Development, Pisenti & Brinker LLP*

Americans are inherently the worst negotiators in the world. Our culture does not support the bartering and bargaining that takes place in other countries. In this presentation you will get a short history of the negotiation process and then you will be provided with 21 steps to help you be a better negotiator.

The goal of the presentation is to have the participants walk away with basic negotiation skills that can be used in all aspects of their daily life. Whether you are negotiating pricing with a prospect, a hotel upgrade on your vacation or just bargaining with your children....this material will give you a head start.

6/11 3:40PM–4:30PM

TAX1906. Fiduciary Income Tax Return Topics

Jackie Patterson

6/11 4:30PM–4:45PM

Transition Break

6/11 4:45PM–6:00PM

FMA1908. Breakout by Firm Size Sessions: 50-75 People

6/11 4:45PM–6:00PM

FMA1909. Breakout by Firm Size Sessions: 76-100 People

6/11 4:45PM–6:00PM

TAX1908. International Tax Update

6/11 4:45PM–6:00PM

FMA1910. Breakout by Firm Size Sessions: 101+ People

6/11 4:45PM–6:00PM

TAX1909. Partnership Tax Update

Gary McBride - Emeritus Professor, California State University, East Bay

During this session, with respect to partnerships and partners, we will explore planning opportunities relating to the TCJA. Learning Objectives include:

- The new interest expense limit under section 163(j);
 - Bonus depreciation strategies for partners.
 - Maximizing the 199A deduction for partners.
 - Centralized Partnership Audit Rule (CPAR) considerations
 - Carried interest rules
 - Other TCJA developments.
-
- how section 163(j) impacts partnerships and partners.
 - how to maximize bonus depreciation for partners.
 - how partners can maximize the 199A deduction.
 - how to determine the optimal CPAR strategy.
 - how to avoid the carried interest rules.
-

6/11 4:45PM–6:00PM

NAA1924. Risk Assessment Standards

Liz Gantnier - Partner, DHG

Carl Mayes - Associate Director - CPA Quality and Evolution, AICPA

Are you starting your audit off on the right foot? At the core of every audit are the goals of identifying, assessing and responding to risks of material misstatement. However, more than a decade after the Risk Assessment Standards were issued, the AICPA Peer Review team has found that more than half of all firms fail to comply with AU-C Section 315 or 330. In this session, you'll learn about the most pervasive issues the Peer Review team has uncovered and how to avoid them in your practice.

Learning objectives:

- 1) Identify the most commonly misapplied requirements of AU-C Sections 315 and 330
 - 2) Understand the intent of the Standards and how the requirements should be interpreted
 - 3) Discuss practical application of the Standards in audits of small to medium-sized entities
 - 4) Access helpful resources to support quality performance
-

NAA1925. ARSC Update & Audit and Attest FAQ

Denny Ard - Partner, DHG

Mike Glynn - Senior Manager - Audit & Attest Standards, AICPA

Kristy Illuzzi - Senior Technical Manager, AICPA

This session will be an interactive discussion with a Panel of experts with respect to SSARSs engagements including, the Chair of the ARSC, the staff liaison to the ARSC, and the staff liaison to the Technical Issues Committee. The Panelists will walk participants through recently issued SSARS No. 24 and the proposed revisions to SSARSs with respect to materiality in a review engagement, the option of issuing an adverse review conclusion when financial statements are materially and pervasively misstated, and performance and reporting on contractual/regulatory framework financial statements. The Panelists will also discuss the ARSC's joint project with the Auditing Standards Board to revise standards for agreed-upon procedures engagements as well as frequently asked questions received by the AICPA's Center for Plain English Accounting.

Participants will learn:

- 1) The revisions to SSARSs as a result of the issuance of SSARS 24 - specifically with respect to international reporting issues, consideration of going concern in a review engagement, and the use of other accountants in a review engagement
- 2) Current SSARSs standard setting activities
- 3) The current status of the ARSC's joint project with the ASB to revise standards for agreed-upon procedures engagements to provide more flexibility to CPAs performing these services
- 4) The answers to frequently asked questions

AAM1913. Communication on Point: Successful strategies for paid social media campaigns

Melissa Harrison - CEO, Allee Creative

Communication is at a crossroads and this includes the digital space. Organic or paid? Influencer marketing or from the brand? Regardless of where you net out, your brand deserves to be in the spotlight. Gone are the days of relying solely on organic content—the best communicators are executing solid paid digital strategies on social media and beyond. From Facebook boosted posts and targeted ads to Twitter campaigns—each comes with its own parameters for reaching niche audiences and expanding brand reach. If you haven't established a paid social media strategy, this is your next move. We'll cover what to track, how to track it, and the most effective way to set up your information to be understood and analyzed by key decision makers in your company.

Learning Objectives:

- 1) Participants will understand the digital channels that are most effective for paid campaigns and how to best use their time in developing those for their audience.
- 2) Participants will be able to organize a paid digital media strategy from start to finish - creating content, scheduling and planning, and analyzing stats.
- 3) Participants will understand the how, why and how often to track results and how to tie them to your brand's overall growth goals.

NAA1926. Basics of the New Lease Accounting Standards

Melisa Galasso - Owner, Galasso Learning Solutions LLC

After years of debate, the new Leases standard was issued in 2016. It will be effective for public companies for 2019 calendar year ends and private entities the following year. While it started out as a highly anticipated convergence project with the IASB, ASU 2016-02 did not result in convergence between the standard-setting boards. In this session, we will examine the impact of implementing the new standard on the balance sheet, income statement, and cash flow statement. We will discuss both the impact to lessees as well as lessors. This course will explore the practical realities of implementation while identifying topics that entities may need to consider as they implement the standard.

Learning objectives:

- 1) Define a lease under ASU 2016-02
- 2) Classify a lease as operating or finance under ASU 2016-02

6/11 4:45PM–6:00PM

AAM1914. Building an Optimal Customer Experience and Effective Customer Journeys

Peg McIntyre - VP Membership, Association of International Certified Professional Accountants

Cheryl Wipper - VP - Communications, Reputations & Brand, Association of International Certified Professional Accountants

Nearly 80% of organizations think they are providing a positive customer experience but customers disagree. Barely 10% of customers feel as if they are being served well. Customer experience is the new brand building—how you interact with customers at every level, from websites to phone conversations to meetings is driving customer value and your bottom line success. How can you determine if you're doing a good job with your clients, if your services are valued, if you have an opportunity to upsell? Customer experience is the new competitive frontier to increase satisfaction, loyalty and advocacy. Learn how to conduct an experience study and get examples of what you might learn about your customers and your company.

Learning Objectives:

- 1) Learn how to conduct an experience study
- 2) Learn how to become an experience-focused organization.

6/11 4:45PM–6:00PM

EDG1908. Introduction to Well-Being

Rachael Smith

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

EDG1909. Charismatic Communication and Powerful Presentations

Elizabeth Pittelkow-Kittner - Controller, Litera Microsystems

Interpersonal communication skills and effective presentations are crucial to job success and career advancement. This session will give you tips on how to be more charismatic in your presence and more engaging in your presentations! Everyone can hone their skills in charisma and communication. This session is highly applicable to professionals at all levels!

Learning Objectives:

- 1) Understand how to be more charismatic in your interactions
- 2) Learn immediately actionable tips for improving presentations and interpersonal communication

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

TAX1910. Charitable Planning Pitfalls

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

6/11 4:45PM-6:00PM

EST1918. Business Succession Planning Part 2

Gary Zwick

David Johnson - *Senior of Counsel, McDonald Hopkins*

These Sessions examine critical elements of the succession plan, including:

- Preliminary planning considerations
- Ownership and management succession
- Key employee compensation
- Equalization among children
- Transferring the business and other assets
- Creative techniques
- Role of charitable giving/Insurance
- Balancing Income tax and transfer tax planning

Learning Objectives:

- 1) Examination of the preliminary planning considerations in developing a succession plan (that are often overlooked)
- 2) Examination of non family key employee considerations and associated succession planning techniques,including compensation planning
- 3) Examination of income and estate tax planning considerations and associated techniques to consider in succession planning

6/11 4:45PM-6:00PM

EST1919. Digital Assets/Cryptocurrency for Estate Planning

6/11 4:45PM-6:00PM

EST1920. IRS Session

Lisa Piehl - *Program Manager, Estate and Gift Tax Policy, IRS*

6/11 4:45PM-6:00PM

EST1921. Review of Documents

Missia Vaselaney - *Attorney, Taft Stettinius & Hollister, LLP*

6/11 4:45PM-6:00PM

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

6/11 4:45PM-6:00PM

PST1917. Practical Approaches to Managing Change In Your Firm

6/11 4:45PM-6:00PM

FMA1906. Breakout by Firm Size Sessions: <25 People

6/11 4:45PM-6:00PM

FMA1907. Breakout by Firm Size Sessions: 26-49 People

6/11 4:45PM-6:05PM

PFP1928. Best Planning Ideas Panel

6/11 6:00PM-7:00PM

Reception in Exhibit Hall

Wednesday, June 12 2019

6/12 6:30AM–6:00PM

Registration Open

6/12 7:00AM–8:00AM

Continental Breakfast

6/12 7:50AM–8:00AM

Transition Break

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 9:15AM–9:40AM

Transition Break

6/12 9:40AM–10:30AM

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

Simon Sinek - Author & Speaker

6/12 10:30AM–11:30AM

Networking & Exhibit Hall Break

6/12 11:30AM–12:45PM

NAA1927. Nonprofit Update

Jeffrey Mechanick

6/12 11:30AM–12:45PM

NAA1928. Applying the Leasing Standard: Implementation Challenges and Illustrations

Tom Groskopf - Technical Director - CPEA, AICPA

More advanced aspects of the lease standard (FASB ASC 842) will be explored in depth using an illustrative approach, including journal entries. Going beyond the basic rules of FASB ASC 842, this session will cover more complicated and challenging implementation issues.

Learning objectives:

- 1) Gain greater comprehension of the essential elements of lease accounting and deeper skills to implement the provisions of FASB ASC 842
 - 2) Learn how to implement more complicated aspects of FASB ASC 842
-

6/12 11:30AM–12:45PM

ENG1920. Engaging NextGen Clients (PST, AAM)

Jennifer Wilson

6/12 11:30AM–12:45PM

NAA1929. Methodology Providers Address Common Missteps

Amy Archer - Senior Manager, RSM US LLP

Carl Mayes - Associate Director - CPA Quality and Evolution, AICPA

Mark Miklosovic - Client Advisory & Strategy - A&A, Thomson Reuters

Cathy Rowe - Product Manager, Accounting & Audit, Wolters Kluwer

Are you using your audit methodology appropriately? Or are common missteps impacting the quality of your work? The AICPA Peer Review Program has found that, in over half of all audits, the auditor is not properly identifying, assessing and responding to the risk of material misstatement in accordance with AU-C 315 and 330.

In this session, representatives from RSM, Thomson Reuters and Wolters Kluwer will instruct the audience on how to properly apply their methodologies, with a focus on the areas which are creating the most challenges for practitioners.

Learning objectives:

- 1) Identify the common missteps that are driving non-conformity with AU-C Sections 315 and 330
 - 2) Learn how to properly apply three commonly used audit methodologies to avoid quality challenges in your practice
-

6/12 11:30AM–12:45PM

PFP1929. Humanizing Technology to Deepen Client Relationships

Cathy Rowe - *Product Manager, Accounting & Audit, Wolters Kluwer*

Technology promises many benefits to today's planners—efficiency, growth, savings and even intelligence. But what about the human side of technology? Often the benefits of technology come at a human cost, primarily frustration, confusion and distraction. More technology, so the establishment believes, is better. But what if better were truly better? This session is a journey through compelling examples of organizations who have embraced the idea that better is better. And the results? By focusing on better technology—and not just more technology—they're seeing bigger AND better results. Learning Objective: 1) Discuss how planners can realize the benefits of technology without the downsides

6/12 11:30AM–12:45PM

PFP1930. Portfolio Construction

Amy Archer - *Senior Manager, RSM US LLP*

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

AAM1915. 8 Simple Techniques To Grow Your Business With Video Marketing

Antoine Dupont - *CEO, Katapult Marketing*

Video marketing is taking consumers by storm because it engages customers and prospects and helps convert them into buyers. Recent statistics show that video content is not only effective, but the demand for it has grown at a rapid pace. According to Hubspot, 43% of people want to see more video content from marketers and companies that use video in their email marketing, see a 5x higher open rate and 8x open-to-reply rates. Cisco also forecasts 80% of all consumer internet traffic will be videos by 2020. With these kind of stats, don't you think it's time to learn more about video marketing?

Learning Objectives:

- 1) How to create a high-quality video with a small budget
- 2) The best marketing channels to promote your video
- 3) How to generate endless sources of content
- 4) Shattering myths and bad habits
- 5) How to produce content your audience cares about
- 6) Where to post and promote your content

6/12 11:30AM–12:45PM

AAM1916. Marketing's Important Role in Building a CPA Firm's Consulting Practice

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

6/12 11:30AM–12:45PM

PST1920. Firm Profitability

Bill Pirolli

6/12 11:30AM–12:45PM

EDG1910. Defining your version of entrepreneurship

6/12 11:30AM–12:45PM

PST1921. Future Tech (non-CPA)

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

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

EDG1911. Leading Leaders

Mike Maksymiw Jr. - *Partner, Marcum LLP*

You're now in a position where you find yourself leading other leaders - both well-established and up & coming leaders. What new skills do you need? What techniques do you now need to employ? How can you overcome the initial fear and wonder of 'am I good enough to lead this group?' (completely normal feeling, by the way) Leadership is a journey, and being the leader of an immensely talented group can feel daunting. We'll talk about how important the timing of your actions are, how the style in which you lead this group will significantly impact its performance, and how vulnerability and honesty enable the group to put their faith and trust in you. There will be ample time to share stories of success and learning along each of our journeys. After all, if we are aspiring to be leaders, we will eventually find ourselves in the position of leading others just like us.

Learning Objectives:

- 1) The five primary leadership styles and how often to use each one
- 2) Skills and techniques to use to lead other leaders

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

TAX1911. Choice of Entity

Sharon Kreider

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

ENG1918. IRA Planning Update (TAX, PFP)

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

TAX1912. Family Office - Financial Planning Panel

Randy Abeles - *Partner, RSM*
Susan Tillery

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

ENG1919. Qualified Small Business Stock Advantages (PFP, TAX)

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

EST1922. Different Ways to Bump Up Your Cost Basis

Jeremiah Doyle - *Senior Vice President, BNY Mellon Wealth Management*
Robert Keebler - *Partner, Keebler and Associates, LLP*

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

FMA1911. Email Extinguisher: Simple Steps to Shrink the Inbox

Marcey Rader - *Productivity Consultant and Speaker, Work Well. Play More!® Institute*

Do you have an inbox full of emails and don't know where to start? Do you use your inbox as your task list? Get the tools you need to break out of email jail. This session focuses on email behaviors and shortcuts for G Suite and Outlook users.

'I've seen major improvements in the last month after attending Email Extinguisher. I left feeling validated with tangible tools to help improve my day-to-day work. The workshop felt like church to me, saying "amen" and "Hallelujah" after each statement.' T. M. Senior Clinical Trial Manager, Vertex Pharmaceuticals.

Learning Objectives:

- 1) Overcome email anxiety and addiction
- 2) Shrink your inbox with rules, filters, and newsletter organization
- 3) Communicate effectively to shut down with Inbox Zero

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

PST1923. Panel: How Not To Get Fired By Clients

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

FMA1912. The Alien Invasion: Non CPAs in our CPA World

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

Networking Lunch

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

EDG1913. How to Run a Meeting That Doesn't Suck

Bill Sheridan

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

ENG1921. Aging & Ill Clients (EST, TAX, PFP)

6/12 1:55PM–2:45PM

ENG1922. Marriage & Divorce After 2017 Tax Act (TAX, PFP)

6/12 1:55PM–2:45PM

EST1923. Grantor Trust Rules and Planning

Steve Siegel - *President, The Siegel Group*

This session will address the grantor trust, and discuss the special rules that govern the grantor trust along with the tax and estate planning opportunities made possible using the grantor trust as a tax planning vehicle. Among the planning techniques discussed will be Living Trusts, Life Insurance Trusts, GRATs, QPRTs, Intentionally Defective Grantor Trusts and more.

Learning Objectives:

- 1) Gain an understanding of the grantor trust rules and how they determine how a person's income will be taxed and how their estate tax issues must be considered.
 - 2) Address a wide variety of tax planning techniques unique to the grantor trust - learn how these techniques work and when best to use them.
-

6/12 1:55PM–2:45PM

EST1924. Estate Freezes

Todd Angkatavanich

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

EST1925. Practical Issues for Multi-National Planning

Peggy Ugent - *Retired, Giordani, Swanger, Ripp & Jetel, LLP*

This session will explore estate and income tax issues for U.S. and non-U.S. persons with cross-border family relations and cross-border investments.

Learning Objectives:

- 1) Familiarize attendees with U.S. taxation issues related to cross border activities.
 - 2) Familiarize attendees with associated U.S. compliance requirements.
-

6/12 1:55PM–2:45PM

PST1925. Preparing for SUT Updates with Technology

6/12 1:55PM–2:45PM

FMA1913. Shifting to a Learning Culture

JoAnn Labbie

We are living in face paced changing world which is impacting our cultures and the learning environment. We will review strategies for strengthening learning, so we are building capacity at all levels. We will explore new best practices and actions for everyone to consider.

Learning Objectives:

- 1) Define learning culture and successful learning organizations
 - 2) Discuss tips, tricks, and transitions
 - 3) Outline factors necessary for a successful change
 - 4) Discuss what is working and what is not working with our firms
-

6/12 1:55PM–2:45PM

PST1926. Business Case for Diversity

Yasmine El Ramly
Jacquelyn Tracy

6/12 1:55PM–2:45PM

FMA1914. Delivering through Diversity

6/12 1:55PM–2:45PM

NAA1930. Early Observations from Applying Topic 606 in the Public Company Arena

6/12 1:55PM–2:45PM

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

6/12 1:55PM–2:45PM

NAA1931. EBP Update

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

NAA1932. Sampling Applications

Lynford Graham - *Visiting Professor, Bentley University*

Sampling is commonly used in many professional applications and the rules can differ from those to be followed for auditing financial statements. A review of some specialized situations and how to approach sampling will be illustrated with examples and techniques for effective implementation. Applying the wrong guidance or approach can result in litigation exposure, peer review or inspection comments. Presented by the chair of the AICPA Audit Guide Audit Sampling.

In this session we will discuss the following:

- 1) Examples of key guides and guidelines that suggest different sampling approaches in specific situations (e.g., AICPA, Single Audit, FAM)
- 2) Confusion in Single Audits: sampling guidance for compliance auditing
- 3) When statistical sampling techniques may be most effective approach
- 4) Tools to assist in sampling applications
- 5) Tips for effective communication with clients regarding sampling and sampling parameters
- 6) When sampling is used in lieu of detailed records for IRS tax purposes"
- 7) Distinguish between various guidance sources when sampling in different types of engagement
- 8) Identify some tools for accomplishing efficient and effective applications
- 9) Discuss case-studies of applications and lessons-learned

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

AAM1917. Track This, Not That - Digital Marketing Metrics Your Managing Partner Will Actually Care About

Bob Goricki - *Director of Digital Marketing, Skoda Minotti Strategic Marketing*

Today's digital marketing tools give us access to a tremendous amount of data on our marketing efforts. What these tools do not give us is more time in front of our managing partner to share our treasure trove of insights. We need to keep it simple and keep it relevant. This presentation covers the best digital metrics to catch your managing partner's attention. Discussion topics include:

- The importance of blog article Entrances compared to total Page Views
- Tracking clicks generated by keyword-specific search results and not just keyword rankings
- The relevance of paid search cost per conversion compared to cost per click

Focusing on the right metrics will result in time well spent with your managing partner and better demonstrate marketing's value to the firm.

Attendees will receive access to a marketing metrics dashboard PowerPoint template.

Learning Objectives:

- 1) Gain a basic understanding of key digital marketing metrics.
- 2) Learn how to create relevant dashboard reports to summarize and present your digital marketing metrics.

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

PFP1931. Niche Marketing

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

TAX1913. Family Office - Hot Topics

Randy Abeles - *Partner, RSM*

Eric L. Johnson - *Partner, Deloitte Tax, LLP*

Eric Johnson from Deloitte Tax LLP and Randy Abeles from RSM US LLP will cover recent hot topics for family offices, including recent case law and judicial activity, how the 2017 Tax Cuts and Jobs Act has impacted family offices, a review of family office entity selection (passthrough vs. C-corporation) in light case law and tax reform, and other relevant developments.

Learning Objectives:

1. Consider recent case law and judicial developments impacting family offices
2. Understand how tax reform has impacted family offices
3. Identify considerations for family office entity selection in light of case law and tax reform
4. Recognize other relevant developments in the family office space

6/12 1:55PM–2:45PM

AAM1918. Five Firms in Six Years - This Isn't Kansas Anymore

Joe Kovacs - Director of Marketing and Business Development, Councilor, Buchanan & Mitchell P.C. (CBM)

Peter Reilly - President and Managing Partner, Councilor, Buchanan & Mitchell P.C. (CBM)

Merging a new practice into an accounting firm has a huge impact on the acquiring firm's culture, delivery systems, professional development, business development philosophy, marketing, and internal communication and technology processes. It challenges individuals' sense of identity, morale and their understanding of their professional roles. While the acquisitions of larger firms usually make industry headlines, it is the smaller and mid-sized firms who are the most changed on every level. CBM has successfully integrated five firms over six years (including one in late 2018), in the process doubling the number of the firm's professionals, adding new practice areas and adopting new technologies and staffing structures. CBM is who we all are now. Join Managing Partner Peter Reilly and Marketing Director Joe Kovacs to learn more about how to succeed during such significant organizational change.

In an era of increasing mergers and acquisitions, the leadership from firms across the country—and internationally—are deciding to adopt practices and other firms that contribute to shorter term growth and longer-term positioning. Managing partners and marketing leaders attending this session will learn about areas of responsibility and decision-making, technology integration, new staffing structures, the absorption of marketing practices or the adoption of new ones, and the critical importance of internal communications to ensure that, despite the fears and challenges associated with organizational change, the end result can be successful and lead to a more financially successful organization with new resources and capabilities to serve the firm's target markets.

6/12 1:55PM–2:45PM

PFP1932. Session Topic To be Announced

6/12 1:55PM–2:45PM

AAM1919. Optimizing Your Role as a Business Development Professional

Jason Jobgen - Director, BKD,LLP

How do you optimize a business development position? Whether you are a business development professional who wants to provide maximum value to your firm or a firm leader who wants to get the most out of your sales professional, aligning the interests of the firm and the sales person is imperative to success.

Over the last 16 years Jason Jobgen has led sales teams and managed practices at BKD, LLP. During this session Jason will discuss the major disconnects he has seen in our industry between firm leadership and business development executives. The session was designed for CPA firm business development executives but the content is also appropriate for those managing sales people or considering an investment in sales resources.

Learning Objectives:

- 1) Understand firm drivers behind growth
- 2) Align a business development role with firm expectations and goals
- 3) Overcome common challenges of the BD role
- 4) Align incentives and compensation with desired outcomes

6/12 1:55PM–2:45PM

PFP1933. Health Insurance for Early Retirement

6/12 1:55PM–2:45PM

EDG1912. How to Identify and Successfully Work With Different Personality Traits

Jessica Iennarella - Forensic Accounting Supervisor, HSNO The Forensics Firm

Are you interested in learning how to more effectively utilize the personality traits inherent in those you work for and those who are working for you? This course is designed to address six common personality traits; three that are typically viewed as negative and three that are typically viewed as positive. You will be provided with guidance on how to identify and best work with those traits.

Learning Objectives:

- 1) Gain awareness of the benefits and pitfalls of six different personality traits.
- 2) Learn how best to work with those personality traits in those you work for and those who are working for you.

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 2:45PM–3:00PM

Transition Break

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 3:00PM–3:50PM

NAA1933. Cybersecurity Risk Management and Impact on the Audit

Steve Ursillo - Partner, Cherry Bekaert, LLP

Brian Thomas

6/12 3:00PM–3:50PM

PST1929. Leveraging Infrastructure as a Service to Build a Nimble 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

NAA1934. Auditor's Report

Linda Delahanty - Senior Manager, AICPA

Tracy Harding - Principal, BerryDunn

During this session participants will learn about the changes made by the AICPA Auditing Standards Board to the Auditor's Report for non-issuers.

Learning objectives:

- 1) Apply ASB auditing standards regarding the changes to the form and content of the revised Auditor's Report for non-issuers
 - 2) Understand what is changing in the auditor's report and how key audit matters are addressed in GAAS
-

6/12 3:00PM–3:50PM

PFP1934. Medicare Planning

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

PFP1935. Client Experience

Tracy Harding - Principal, BerryDunn

6/12 3:00PM–3:50PM

TAX1916. Real Estate Tax Update

Karen Brosi - *Owner, Karen Brosi, EA, CFP, LLC*

6/12 3:00PM–3:50PM

PFP1936. SALT limitations and charitable planning for tax purposes in general (CRTs, Donor advised funds, bunching, etc.)

Robert Keebler - *Partner, Keebler and Associates, LLP*

6/12 3:00PM–3:50PM

PFP1937. Topic to be Announced

6/12 3:00PM–3:50PM

AAM1920. Coaching Teams & Individuals to Maximize Performance

Adelaide Ness - *Executive Vice President, The Rainmaker Companies*

6/12 3:00PM–3:50PM

AAM1921. Let Your Clients Tell Your Story: Getting Great Testimonials

Christine M Nelson - *Senior Communications Consultant, Ingenuity Marketing Group, LLC*

Dawn Elizabeth Wagenaar - *Principal, Ingenuity Marketing Group LLC*

How do you get clients to say more than, 'They are responsive,' or 'They provide great, quality service'? In this session, learn the interview techniques and active listening skills that get real stories from your clients to differentiate your firm. We highlight our experience from hundreds of client interviews over more than a decade. You will learn how to ask for the interview, create the right questions, listen for telltale signs of dissatisfaction that can retain a straying client, and secure an approved, 'wow' testimonial or case study for marketing.

Learning Objectives:

- 1) Messaging to get partner support if necessary
 - 2) Develop your process for asking busy clients to be interviewed and make them feel special
 - 3) Key questions that get better answers during the interview
 - 4) How to craft the transcript into a 'wow' testimonial that clients will approve
-

6/12 3:00PM–3:50PM

AAM1922. Building and Scaling Your Marketing Team

Rhonda Maraziti - *CMO, Withum Smith + Brown, PC*

Building a high-performing team to match the needs of your growing Firm can be an exciting yet daunting journey. Join Rhonda Maraziti, Chief Marketing Officer with Withum, as she shares her story of starting at the bottom of the Marketing Department ladder 13 years ago as part of a team of four in one office, working her way up to leading a dynamic team of 22 marketing professionals in six major financial centers. She will also share the key elements of building and adding talented marketing team members to accommodate your Firm's vision for growth and the ever-changing demands of technology.

Attendees will learn:

- 1) Different types of departments within the Marketing Department, and what the expectations are in these roles;
 - 2) When to create 'specialists' versus 'generalists'... even in Marketing;
 - 3) Strategies to help build trust in each other and in the team's purpose;
 - 4) How to be an advocate for your team, even with work/life balance.
-

6/12 3:00PM–3:50PM

EDG1914. High-Trust = High-Performance

Brent Forbush - *Partner, Forbush and Associates*

When our firms build a significant culture of trust, this leads to powerful performance and reduces friction and promotes cooperative behavior. Learn how to manage the eight "Oxytocin" building blocks of organizational trust which will lead to an increase release of Oxytocin. By building a culture of trust we reduce team friction and create an easier work environment. Firms that build a high culture of trust will see teams more engaged, more productive, and higher team member retention.

Learning Objectives:

- 1) Educate future team leaders and profession visionaries on the 8 components of a strong culture of trust.
 - 2) Demonstrate through hands on activity the use of the 8 components to initiate a strong clear vision of trust from top down and bottom up.
-

6/12 3:00PM–3:50PM

TAX1914. Dealing with Itemized Deductions

Joseph Walloch - *CEO, Walloch Corporation*

6/12 3:00PM–3:50PM

TAX1915. Depreciation and Cost Regs

Nathan Clark

6/12 3:00PM–3:50PM

ENG1924. Why Trusts (EST, TAX)

Missia Vaselaney - Attorney, Taft Stettinius & Hollister, LLP

6/12 3:00PM–3:50PM

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

6/12 3:00PM–3:50PM

FMA1915. Using Strategic Questions to Drive a More Successful Culture

Jeremy Clopton - Director, Upstream Academy

Do you know your strategic questions? Chances are you're struggling to overcome challenges: integrating millennials, effectively managing data, leveraging technology, moving the needle on innovation, etc. But it's also likely you are focused on the wrong questions. Rather than taking the traditional approach to these topics, Jeremy will encourage you to start with different questions. Through engaging discussion, humor and actionable takeaways, Jeremy will use the SQ Method to provide firms the framework they need to ask the right questions, get the answers they need, and build a more successful culture.

Learning Objectives:

- 1) Describe a methodology that focuses on questions to accomplish firm goals.
 - 2) Understand how a culture of questioning can lead to innovation, growth, and overall success.
-

6/12 3:00PM–3:50PM

EST1926. Estate Planning for Real Estate

6/12 3:00PM–3:50PM

EST1927. Estate Planning with IP

6/12 3:00PM–3:50PM

EST1928. Estate Planning for S. Corps / Trusts

6/12 3:50PM–4:50PM

Networking Break - Refreshments & Vendor Displays

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

ENG1928. Social Security Update (PFP, TAX)

Ted Sarenski - CEO, Blue Ocean Strategic Capital

6/12 4:50PM–6:05PM

ENG1929. Inspector Gadget (PST, PFP)

David Cieslak

6/12 4:50PM–6:05PM

EST1929. Legislative Update

Harry Gutman

6/12 4:50PM–6:05PM

EST1930. Estate Planning Speed Round

Mary Kay Foss - *Owner, Mary Kay Foss CPA*

Eileen Sherr - *Senior Manager - AICPA Tax Policy & Advocacy, AICPA ENGAGE*

This session covers four hot topics and developments in those areas of trust, estate and gift tax. The four experts will explain the issues and guidance you need to know to further help your clients in those four areas of estate and gift taxation. The experts will cover and answer questions about the latest developments in the specific area. Attendees will have the opportunity to exchange ideas with the speakers and their conference peers.

Learning objectives:

- Understand four of the latest developments and emerging issues in the trust, estate and gift tax areas
- Learn what the IRS, Treasury and Congress have said and plan to do in the four areas
- Identify planning opportunities and strategies that are relevant to one's practice in the four areas covered.

6/12 4:50PM–6:05PM

EST1931. 706, 709 Audits and Litigation

6/12 4:50PM–6:05PM

AAM1924. Inclusion as a Brand Advantage

Joanne Y. Cleaver - *President, Wilson-Taylor Associates Inc.*

Inclusion shapes firm reputation; can open new business relationships; and can further relationships with existing clients – if it is done right. The Accounting MOVE Project has converted the business case for inclusion to business results since 2010. Here are best practices that drive "return on inclusion" to capture the potential "diversity dividend" for reputation, growth, retention and firm value, and case studies from major firms that show real results.

Learning Objectives:

- 1) Understand why diversity & inclusion is so essential for proposals and what potential clients look for
- 2) Learn how talent & HR can best coordinate with marketing and business development to synchronize the mutual goal of ensuring that women and diverse staff gain essential business development experience that qualifies them for partner
- 3) Learn how to build a 'trust halo' when your firm is still 'in process' on inclusion efforts - as all are
4. Hear case studies from major firms that have converted diversity recognition to revenue

6/12 4:50PM–6:05PM

ENG1930. Advanced Post Mortem Estate Planning (EST, PFP, TAX)

Jeremiah Doyle - *Senior Vice President, BNY Mellon Wealth Management*

6/12 4:50PM–6:05PM

FMA1916. How to Build a High Performing Culture

Bill Keiser

6/12 4:50PM–6:05PM

NAA1935. Testing Internal Controls as a Strategy for Smaller Audited Entities

Lynford Graham - *Visiting Professor, Bentley University*

The chair of the Task Force of the AICPA Audit Guide Assessing and Responding to Audit Risk in a Financial Statement Audit will review the basic control assessment requirements for all audited entities. Implications for compliance and efficiency in smaller entities will be illustrated with examples. Implications of non-compliance with required procedures will be discussed.

Learning objectives:

- 1) Get an overview of required controls assessments and gathering of evidence of operation for all entities
- 2) Discuss how to assess the extent of assurance/risk to be taken from various control related procedures
- 3) Determine the trade-offs of different strategies in auditing key accounts such as revenues
- 4) Discover implications of non-conformity with basic requirements
- 5) Understanding of the opportunities for testing controls and greater audit efficiencies in smaller audit engagements
- 6) Identifying the areas of the audit most likely to benefit from more controls reliance
- 7) Discuss the pitfalls and dangers of failing to make a proper assessment of the entity system of internal control

6/12 4:50PM–6:05PM

TAX1917. S. Corp Tax Update

6/12 4:50PM–6:05PM

NAA1936. Revenue Recognition: Software Technology

6/12 4:50PM–6:05PM

TAX1918. Dealing with IRS Representation

6/12 4:50PM–6:05PM

AAM1923. Google 2019: What You Need to Know

Danielle Leitch - *Executive Vice President, MoreVisibility*

As Google continues to dominate the customers digital journey, as well as provide valuable resources for marketers, make sure you are up to date on the latest and greatest. In this session, we will explore what every firm should have their Google Toolbox. Topics covered will include:

- Full-funnel marketing opportunities in Google Ads
- Effective targeting strategies
- Leveraging Google Analytics for ROI
- Establishing meaningful KPIs
- What's Next from Google? - Voice Search, Behavioral Marketing and more!

Learning Objectives:

- 1) Gain deeper understanding of the hottest topics in Google brands should be considerate of now and as they strategize for 2019.
- 2) Learn actionable takeaways to help brands to leverage the most sophisticated options and predictive tools within Google to meet users' needs early and often – including before they even begin to search.

6/12 4:50PM–6:05PM

EDG1915. Listening! The Key to being a Better Boss, Employee, and Mentor

Stephanie Pickering - *Senior Manager, McGee,Heame & Paiz,LLP*

Do you ever find yourself in a conversation where you missed important details because you were focusing on what you were going to say next? If so, you might need to enhance your listening skills! This interactive EDGE session will focus on the keys to great listening and how to build those skills to be a better boss, employee, and mentor.

Learning Objectives:

- 1) Understanding listening as a communication tool
 - 2) Understanding passive versus active listening
- Learning Objective - application of active listening.

6/12 4:50PM–6:05PM

EDG1916. Vulnerability: Mental Wellness in the office

Becca Shane

6/12 6:00PM–7:00PM

Reception in Exhibit Hall

Thursday, June 13 2019

6/13 6:30AM–6:00PM

Registration Open

6/13 7:00AM–7:50AM

TAX19ER02. 2019 Filing Season Debrief

Join members of the AICPA's Individual and Self Employed Tax Technical Resource Panel (ISET TRP) for a debrief of how this past filing season went, along with a review of current legislation developments- including how the AICPA is working to advocate for our members and regulations for the Tax Cuts and Jobs Act.

The panel will also cover new cases and revenue rulings, as well as report on significant code section cases that may affect your practice. Attendees are encouraged to bring their questions to the session as well as get feedback and tips on how to start planning now for a better 2020 filing season.

After this session, you will be able to:

- Identify legislative and regulatory tax developments in individual & self-employed tax area.
 - Identify emerging individual & self-employed tax policy and advocacy issues important to AICPA members.
-

6/13 7:00AM–7:50AM

TAX19ER03. Change of Accounting Method

Annette Nellen - *Professor, San Jose State University*

What is a method of accounting and how and why should it ever be changed? Often when we find an error on a return, we think the solution is amending the return. But if a method is involved a different solution is required. Also, the TCJA allows more favorable accounting methods for small businesses. To change from a pre-TCJA method to a new permissible one, a change in method and Form 3115 is required. This session will:

1. Explain the change in method process, rationale, and practice tips.
2. Learn to recognize a method and how to change it if desired or required.
3. Learn how to compute a Section 481(a) adjustment and complete Form 3115 to change an accounting method.

6/13 7:00AM–7:50AM

TAX19ER04. When to Form Family Office

Randy Abeles - *Partner, RSM*

6/13 7:00AM–7:50AM

PST19ER01. Tax Season Debrief

DeAnn Hill
Mike Shost

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–8:00AM

Continental Breakfast

6/13 7:50AM–8:00AM

Transition Break

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 9:15AM–9:30AM

Transition Break

6/13 9:30AM–10:45AM

AAM1927. Finding Hidden Business Development Horsepower at your Firm

Art Kuesel - *President, Kuesel Consulting, Inc.*

The growth statistics don't lie. The profession is in a two year trend of organic growth decline. Firms need business development horsepower more than ever to grow their firms. And, this growth can come from new and previously hidden sources. In this program we'll identify four major ways of adding organic growth and horsepower and follow the careers of four 'non-traditional' business developers who have added significant revenue to their firms by embracing a career shift toward 100% business development.

Learning Objectives:

- 1) Identify new sources of organic growth,
- 2) Apply new strategies to source growth within the four walls of the firm, and approach leadership with recommendations that can help drive new organic revenue sources.

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

AAM1925. Building Relationships and Referrals Through Networking: Online and the Real World

Jean Caragher - *President, Capstone Marketing*

Networking continues to be a top lead generation strategy for CPA firms. In fact, according to Gear Up for Growth, networking with prospects and referral sources is one of the top four marketing activities firms of every size plan to increase. This is particularly important since "referrals from peers, friends or family" is the top tool millennial business owners use to find accounting services.

Attendees will enhance their networking skills with a mock networking event during the session and leave with practical ideas and processes to grow their referral network.

Don't miss out on the most effective way to generate leads simply because you don't think you have the skills. Attend this session and prove yourself wrong – and grow your referral network.

Attend this hands-on, interactive session and learn:

- 1) How to create and expand your network – even if you are an introvert
- 2) The five obstacles to networking and how to overcome them
- 3) How to prioritize your network
- 4) The Top 12 questions to ask at a networking event
- 5) Six networking don'ts
- 6) How to establish and grow your network through social media

6/13 9:30AM-10:45AM

PST1933. Virtual Offices & Remote Workers

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

6/13 9:30AM-10:45AM

AAM1926. No Time, No Problem: How Content Creation Can Compete (And Win) Against The Billable Hour

Abbey Kanellakis - *Content Development Specialist, Rea & Associates, Inc.*

Your managers and principals (you know, the ones you depend on to help you produce killer content to support your marketing strategy) are busy. They don't have time to write that 700-word blog post you need, and they don't understand why you are asking them for it now - with their major deadline approaching and client meetings to attend to. So, how do you get the killer content you need without asking them to forfeit the billable hour? This session will reveal several easy solutions you and your team can put into play immediately and will address content creation for a variety of mediums.

Learning Objectives:

- 1) How to be more effective when asking firm leaders for their expertise and thought leadership.
- 2) How to pull amazing content from principals, managers and other thought leaders (during busy season or in between client meetings) without them even knowing.
- 3) Content generation tools that will make your life easier.
- 4) How everything old can become new again when repurposing content

6/13 9:30AM-10:45AM

EDG1917. Leadership: What's Love Got to Do with It?

Donna Salter - *Faculty, Intend2Lead*

When love is nonexistent (compassion, forgiveness, commitment, inclusiveness, understanding), leadership generally fails. True leadership not only requires love, it IS love. Yet amazingly, love is rarely described as a leadership competency. Your future, and the future of the accounting profession, depends on our capacity to authentically model this behavior. Embrace your natural leadership skills and love for what you do, your passion, the people and organization you lead, by joining this interactive session as we explore this vital competency.

Learning Objectives:

- 1) Live facilitation with group discussion, instructor-posed questions with time for participant reflection, and interactive exercises.

6/13 9:30AM-10:45AM

EDG1918. Getting Stuff Done in Today's World

Renee Prince - *President, Renee Prince CPA PC*

Feel like your to-do list is never ending? Always working and, yet, nothing ever seems to get done? Come and learn some tried and true tips for getting stuff done in today's hectic paced world.

Learning Objectives:

- 1) Learn time and task management to get more done.
 - 2) Learn to be better organized to ensure maximum effectiveness.
-

6/13 9:30AM-10:45AM

TAX1919. Individual Income Tax Update

Sharon Kreider

6/13 9:30AM-10:45AM

FMA1917.

6/13 9:30AM-10:45AM

FMA1918. Lean CPA Firm Operations

Roman H. Kepczyk

Lean Six Sigma consultations within the accounting profession primarily focus on process improvement within the firm's tax and assurance practices, often overlooking internal operations where there is a trove of production efficiency and financial benefits. Lean CPA Firm Operations will explain how Lean Six Sigma methodologies can improve your firm's Practice Management, Internal Accounting, Payroll and Information Management processes to streamline your internal operations.

Learning Objectives:

- 1) Clearly understand Lean Six Sigma consulting methodology with an explanation of practical tools and resources that you can apply immediately within your own firm
 - 2) Walk through the firm's internal operations to identify key areas where Lean processes will improve your firm's administrative processes.
-

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 10:45AM-11:15AM

Networking Break

6/13 11:15AM-12:05PM

PST1937. Time Management for Accountants

Gail Perry

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

TAX1922. Stock Options

Karen Brosi - Owner, Karen Brosi, EA, CFP, LLC

6/13 11:15AM-12:05PM

AAM1930. We have too many projects planned for next year - how do we *wisely* prioritize them?

Launa Stewart - Founder / Principal Consultant, Launa Stewart Consulting

Do you have too many 'Urgent/Top' priority projects lined up for next year? Are you constantly navigating the competing needs of the different groups within your firm? In this session you will learn ways to better consolidate, articulate, and prioritize your organization's initiatives so that you can confidently draw the lines between 'should do' / "could do" / "might like to do someday"-type categories. Using decision science techniques & tools, see how you can fold hard data with "soft input" together to give your firm the best foundation possible for making sound and informed growth decisions.

Attendees will learn:

- 1) How to clarify your firm's most important goals / characteristics when measuring and weighting projects / initiative portfolio(s)
 - 2) Different decision science methodologies that can be used when gathering stakeholder's input
 - 3) How to evolve your prioritized project list over time; integrating the inevitable changes that will occur in the market place, evolving client needs and expectations, and developments within your firm.
-

6/13 11:15AM-12:05PM

AAM1928. When Accounting and Content Add Up: How to Measure Content ROI

Samantha A. Nystrom - *Content & Digital Marketing Manager, Sikich LLP*

Accounting and content and digital marketing are polar subjects that have common denominators: analysis and ROI. As digital marketing becomes more integrated, from recruiting to audits and everything in between, it gets harder to determine its ROI. With data streaming from social media to Google Analytics and PR placements, what should a company hone in on? Create a digital strategy and learn about the ROI in marketing through simple math: add your most recent digital marketing efforts, subtract the least engaging content, multiply one piece of content into six, and divide your new marketing plan internally and externally to make the most of your digital marketing efforts. Walk away with a better understanding of digital marketing analytics, and which data speaks to the greatest ROI.

Learning Objectives:

- 1) Distinguish which data to focus on to help refine your digital marketing strategy for greater results with less effort.
- 2) Walk away with an understanding of the impact content marketing has on business metrics to more effectively measure content marketing ROI.
- 3) Understand how to do this with minimal effort through a worksheet that guides you through how to take one piece of content and easily multiply it into six pieces that can be used in various outlets.
- 4) After this session, you will be better able to align content and revenue attribution.

6/13 11:15AM-12:05PM

AAM1929. Tales from the Other Side: The CPA as a BD Executive

Jay L. Oliphant - *CPA, DHG LLP*

As accounting firms recognize the value of a solutions-based approach to serving clients, the demand for CPAs who can ask the right questions and develop trusted relationships increases. Some CPAs have translated these skills into full-time business development roles. In this session, participants will hear from a successful CPA from a Top 20 accounting and advisory firm who has dedicated his career to creating new business opportunities. CPAs, marketing specialists, and business development professionals will gain valuable insight on leveraging their skills and experience to grow their firm.

Learning Objectives

- 1) Understand the role of Business Development in today's CPA firm
- 2) Leverage the diverse background of marketing and business development professionals to grow their firm.

6/13 11:15AM-12:05PM

FMA1919. Team Development TBD

Christine M. Holliden

6/13 11:15AM-12:05PM

FMA1920. The Legal View of Being Non-Politically Correct

David Miklas - *owner, Law Office of David Miklas, P.A.*

What happens if the boss say something that is not Politically Correct? Is it different if an employee does it? Can you be sued for discrimination or harassment? How do federal employment laws impact what can be said at work? Attendees will learn about the Equal Employment Opportunity Commission, the National Labor Relations Act, and various federal laws, including Title VII of the Civil Rights Act.

Attendees will learn:

- 1) How to analyze verbal and written statements (including email and text messages) that may not be politically correct; and
- 2) How the employer (e.g., a CPA firm) should respond when they receive a complaint about comments that are not politically correct, or uncivil, or otherwise inappropriate.

6/13 11:15AM-12:05PM

EDG1919. Naked Organizations

Brian Kush - *Principal, Intend2Lead*

Don't worry; you can keep your clothes on for this. Please do!! In addition to your clothes, you'll leave with a better understanding of what naked leadership truly is, and why we need it now, more than ever. Brian will also explore some specific practices you can bring back to your organization to create a more naked workplace where connection, collaboration and innovation thrive. What goes on at naked organizations? Come find out!

Learning Objectives:

- 1.) Define naked leadership
- 2.) List three practices your organization can start to become a more naked place where connection and innovation thrive

6/13 11:15AM-12:05PM

TAX1920. K1 Session on the Hill

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

TAX1921. Succession Planning

Bob Barnett

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

TAX1923. Tax Strategies for Life's Big Changes

Jim Grimaldi
Jim Revels

6/13 12:05PM-1:15PM

Lunch

6/13 1:15PM-2:30PM

AAM1931. Playing Politics: The Psychology of the Human Workplace

Karyln Borysenko - *Organizational Psychologist, Zen Workplace*

When most people think of office politics, they have a visceral negative reaction. But here's the thing: When you learn to navigate the unspoken rules of the workplace, you can achieve more than you ever dreamed! Playing Politics offers five concepts you need to know based on the science behind how human beings make decisions at work. It's a crowd pleaser, a talk that will entertain, inspire, and offer practical advice for improving your office effectiveness.

Learning Objectives:

- 1) Understand the psychological drivers of how people make decisions at work.
- 2) Build better relationships at work with people at all levels in your organization.
- 3) Inspire you to think differently about the dynamics of your organization so that you can be an influencer and change agent, using "politics" for good rather than for evil.

6/13 1:15PM-2:30PM

TAX1924. Like-Kind Exchanges

6/13 1:15PM-2:30PM

TAX1925. Should you Convert to a C-Corp

Annette Nellen - *Professor, San Jose State University*

The TCJA drop in the corporate tax rate to a flat 21% makes the C corporate form of doing business sound attractive. But Congress offered temporary rate relief for other entities with a new qualified business income (QBI) deduction of 20%, but not all business activities and owners qualify for it. Pre-TCJA changes to capital gains incentive Section 1202 makes C corporations useful for attracting capital, but not all types of businesses qualify. And some TCJA changes limiting deductions for employees might lead some employees to consider a 'loan-out' entity. This session will explore the pros and cons of C corporations after the TCJA and due diligence and planning tips in considering converting to or forming this type of entity.

Learning Objectives:

1. Describe the TCJA changes that make C corporations a favored or perhaps unfavored entity choice.
2. Understand the due diligence and planning considerations relevant to converting to or forming as a C corporation.

6/13 1:15PM-2:30PM

TAX1926. Family Investment Partnerships

6/13 1:15PM-2:30PM

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

6/13 1:15PM–2:30PM

EDG1920. Developing a Coaching Culture

Melisa Galasso - Owner, Galasso Learning Solutions LLC

This course will discuss how companies and firms can focus on using the concepts of coaching to improve engagement. In lieu of focusing on the establishment of formal coaching programs, this course will help your organization to incorporate the best practices in coaching (proactive listening, powerful questions, building trust, and holding space) into their day-to-day culture to create a powerful coaching environment where your team members will thrive.

Learning Objectives:

- 1) List the benefits of a coaching culture
 - 2) Describe the key tenets of coaching
-

6/13 1:15PM–2:30PM

FMA1921. Is Leadership Going Soft?

Judy Hoberman

Study after study has shown that soft skills are vital in helping individuals and businesses succeed. According to a recent report from Boston College, Harvard University, and the University of Michigan, training in soft skills such as communication and problem solving can raise productivity and retention by 12 percent and deliver a 250 percent return on investment. But how can you develop your soft skills, and use them to your advantage? Adapting to the change in leadership skills starts with the culture of the company. During this session, you will hear about how soft skills can help set you apart and give you a competitive edge in the workplace while also discovering the seven essential qualities of leadership that are so important in our daily lives.

Learning Objectives:

- 1) Discovering ways to see the soft skills from a different vantage point
 - 2) Understanding the characteristics of effective leadership How to redefine the climate if you can't change the culture
-

6/13 1:15PM–2:30PM

PST1944. Effective Strategies to Secure and Retain Top Talent

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

TAX1927. Estate Planning Strategies

6/13 1:15PM–2:30PM

PST1942. RPA and AI: Use Cases for CPAs

6/13 1:15PM–2:30PM

PST1943. Office 365 - The Lesser Known Apps

Gerry Wilton

6/13 2:30PM–2:45PM

Transition Break

6/13 2:45PM–4:00PM

EDG1921. 7 Seconds for Success: Discover and Build Your Personal Brand

Jennifer Elder

6/13 2:45PM–4:00PM

EDG1922. Unleash Your Peak Performance Potential

Sarah Elliott - Principal and Co-Founder, Intend2Lead LLC

To act more boldly as a leader, you must increase your capacity to bring energy and full engagement to the things you value most. We will explore how well-being and mindfulness contribute to your overall performance and leadership of others. Once you learn how to access your peak performance levels, you will be unstoppable!

Learning Objectives:

- 1) Explore how well-being and mindfulness contribute to your overall performance.
 - 2) Explore how well-being and mindfulness contribute to your leadership of others.
 - 3) Create a personal plan to access your peak performance.
-

6/13 2:45PM–4:00PM

FMA1922. Data Driven Firm Automation Panel

Roman H. Kepczyk

Big data is having a profound impact on the accounting profession and CPA firms are utilizing data analytics applications, machine learning and robotic process automation. This session will discuss actual utilization of these technologies within accounting firms and an overview of where these technologies are going.

Learning Objectives:

- 1) Hear firsthand examples of data analytic and dashboard tools, automated production processes use machine learning and robotic process automation being implemented in CPA firms today
- 2) Understand the process the panelists went through to evaluate and implement applications

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

PST1945. Roundtable Discussions: HR

Renee Moelders

6/13 2:45PM–4:00PM

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

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

TAX1928. Advanced 199A Planning Strategies

6/13 4:00PM–4:15PM

Transition Break

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

EDG1923. Why do you want to be a manager? Tips to transition into your new leadership role

Louis Griego - Senior Manager, Sandia National Labs

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

EDG1924. Be More than a Machine: Why Emotional Intelligence Matters

Tom Hood

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

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

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

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

FMA1923. 50 Ideas in 50 Minutes

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

TAX1929. Best Ideas Panel
