

Goals and strategies that translate to success

Advanced Estate Planning

Sessions: June 11–13
Workshops: June 10

[Register now →](#)

Sunday, June 10, 2018

7:00AM – 6:00PM Registration Open

8:00AM – 5:00PM Pre Conference Optional Workshops (Select One)

EST18101. EST Basic Workshop

Missia Vaselaney JD, (inactive) CPA Attorney | Taft Stettinius & Hollister, LLP
Gary Zwick Partner | Walter Haverfield, LLP

This workshop will provide a foundation in estate planning that you cannot get elsewhere. You will hone your skills in communication, networking and building client rapport as well as build your basic knowledge through practical applications of wills, trusts, property law and estate planning concepts — the knowledge foundation a practitioner needs to succeed in an estate planning practice.

EST18102. 706, 709, 8971 Workshop

Mary Kay Foss CPA Mary Kay Foss CPA Owner
Donita Joseph CPA M.S. Taxation Clark Nuber PS Shareholder

Increased Exclusion Amounts for Estate and Gift Tax Purposes will likely multiply the necessity for preparation of Form 706 for portability purposes. In this session, we will review the basics of Form 706, 709 and 8971 preparation and answer your compliance questions. Determine how to present 706, 709 and 8971 information to minimize audit risks Recognize due dates, availability of extensions and follow-up filings Identify return preparation tactics to maximize DSUEA and tax basis.

5:10PM – 6:00PM EST18SS01. Solution Session TBA

To be announced

Sunday, June 10, 2018

6:00PM – 7:30PM Welcome Reception

Monday, June 11, 2018

7:00AM – 7:00PM

Registration Open

7:00AM – 8:00AM

Continental Breakfast

7:00AM – 7:50AM

Early Riser

EST18ER01. Basic Income Taxation of Trusts

Jackie Patterson

Partner | Buchanan & Patterson, LLP

This is a broad overview of the income taxation of fiduciary entities, more specifically estates and non-grantor trusts. We will discuss rules, tools and updates that broadly impact and assist in the preparation and review of fiduciary income tax returns.

Learning objectives:

- Review basic rules that apply to the income taxation of all estates and non-grantor trusts.
- Review impact of 2018 tax law changes as they affect fiduciary entities.
- Analyze tools and schematics helpful in navigating fiduciary compliance issues.

EST18ER02. International Estate & Tax Planning Issues

To be announced

EST18ER03. Private Placement Life Insurance as a Tax Strategy

To be announced

EST18ER04. Session Topic TBD

To be announced

7:50AM – 8:00AM

Change Break

8:00AM – 9:15AM

General Session

EST1801. Estate Planning Update

Andy Katzenstein

Partner | Proskauer Rose, LLP

To be announced

PIT1801. Peer Review Team Captain Training: Part I

Jim Brackens

Vice President - Ethics & Practice Quality
| AICPA

Tom Parry

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. Peer review is undergoing significant change as a result of several key initiatives and it is imperative team and review captains stay current. Both parts, which run back-to-back, must be completed to fulfill the requirement.

9:15AM – 9:30AM

Change Break

9:30AM – 10:45AM

Concurrent Sessions (Select One)

ENG1801. Topic Presented by Bob Keebler

Bob Keebler

To be announced

9:30AM – 10:45AM

General Session

PIT1802. Risky Business: Properly Assessing and Responding to Audit Risk

Carl Mayers

Senior Technical Manager | AICPA

Are you starting your audit off on the right foot—or setting yourself up to do more work than necessary? Failure to comply with AU-C 315 and 330 is one of the most common audit deficiencies noted in Peer Review. Risk assessment drives your entire audit, so it's crucial to get it right. Not only is proper assessment and response to risk required by professional standards, but not taking a risk-based approach often leads to over-auditing. The AICPA Peer Review Program found a few common misconceptions leading to non-conformity with the standards, which will be shared in this session so you can circumvent them in your own practice.

In this session, Carl R. Mayes Jr., CPA, Senior Manager, Special Projects — Public Accounting at the AICPA, will discuss:

- What the risk assessment and response standards require
- Common misconceptions about risk assessment and response and how to avoid them in your practice
- Resources available to help your practice

10:45AM – 11:15AM

Networking Break - Refreshments & Vendor Displays

11:15AM – 12:30PM

Concurrent Sessions (Select One)

ENG1802. Practical Implementation of Wealth Transfer Strategies

Brian King

Officer - Other Non-Financial | Plancorp

Many advisors shy away from implementing and administering advanced estate planning strategies. Gaining the knowledge and confidence to add these services to your practice can provide tremendous value to your clients. In this session we will discuss the implementation and administration of two specific strategies. Grantor Retained Annuity Trusts and Sales to Intentionally Defective Grantor Trusts.

Learning objectives:

- High level overview of Grantor Retained Annuity Trusts and Intentionally Defective Grantor Trusts
- Identifying opportunities to use the above techniques
- Understanding best practices and traps when implementing the above techniques.

EST1802. Speed Round!

To be announced

EST1803. IRS Exams & Compliance

To be announced

EST1804. Using Trusts as S Corporation Shareholders

Laura Howell-Smith

To be announced

11:15AM – 12:30PM

General Session

PIT1803. Getting Started with Lean Problem Solving

Noel Albertson

Director, Project and Technology
Delivery, Examinations — Public
Accounting | AICPA

Carey Mitchell

AICPA

We all want to create value. And companies using lean accounting have better information for decision making, use simple and timely reports that are clearly understood by everyone in the company, and focus their business around the value created from their customers. In this interactive session, we will work together to identify waste commonly found in accounting firms and bring value to the end customer, the client.

In this session you will:

- Define Lean.
- Examine and walk-through key elements of Lean systems.
- Identify processes to minimize waste and create wealth in your organization through a lean accounting and management approach that improves profitability by streamlining operations.
- Generate ideas for eliminating waste.
- Recognize customer value through target-costing, eliminate waste through value-stream management, improve flow with capacity management, and strive for perfection through continuous process improvement.
- Distinguish between the importance of eliminating waste, reducing defects, and improving process flow.

12:30PM – 1:45PM

Networking Lunch

1:45PM – 3:00PM

ENG18K01. ENGAGE KEYNOTE:
Eyewitness to Power: Leadership in America

David Gergen

From Nixon to Clinton, Watergate to Whitewater, few Americans have observed the ups and downs of presidential leadership more closely over the past thirty years than David Gergen. A White House adviser to four presidents, both Republican and Democrat, he offers a vivid, behind-the-scenes account of their struggles to exercise power and draws from them key lessons for leaders of the future. As the world's economic and political dynamics continue to evolve, a new age is ahead for America, but its realization will depend heavily upon the success of a new generation at the top. Drawing upon all his many experiences in the White House, he offers seven key lessons for leaders of the future. What they must have, he says, are: inner mastery; a central, compelling purpose rooted in moral values; a capacity to persuade; skills in working within the system; a fast start; a strong, effective team; and a passion that inspires others to keep the flame alive.

3:00PM – 3:30PM

Networking Break - Refreshments & Vendor Displays

3:30PM – 4:20PM

Concurrent Sessions (Select One)

EST1805. The Use of Trusts in Planning One's Estate

Missia Vaselaney JD, (inactive) CPA Attorney | Taft Stettinius & Hollister, LLP

This session will focus on the non tax advantages and tax advantages of using a trust in planning ones estate. Determine what type of trust may be necessary for a clients tax and non tax objectives to be achieved. Learn how trusts can help avoid delay, save costs and provide security to a client's family.

3:30PM – 4:20PM

Concurrent Sessions (Select One)

EST1806. Tax Filing Issue for Decedents

The income tax return for a decedent has special rules that the CPA must navigate. This session will discuss what special issues arise when filing a decedent's income tax return and what elections are available on the decedent's final income tax return.

- Learn what special rules apply when preparing a decedent's final income tax return
- Learn how to anticipate an IRS audit and how to prepare for a successful outcome

EST1807. Top Tax Planning Techniques

To be announced

EST1808. Gift Tax & Traps

To be announced

3:30PM – 4:20PM

General Session

PIT1812. Cutting Edge Communications

Jonathan Cox	AICPA
Jennifer Gardner	AICPA
Stacie Saunders	AICPA

Technology and the impact it has on the way we communicate with each other isn't something we can ignore. Organizations must not only adapt to keep up, but fully utilize resources available to tell stories and engage with audiences. In this session, you will learn strategies and tips to move your communication efforts into the future.

4:20PM – 4:35PM

Change Break

4:35PM – 5:25PM

Concurrent Sessions (Select One)

EST1809. Tax Reform

To be announced

EST1810. Trusts as IRA Beneficiaries

Mary Kay Foss CPA	Owner Mary Kay Foss CPA
-------------------	---------------------------

More often trusts are being named as beneficiaries for retirement arrangements. The beneficiary choice has impact for both income tax and estate tax planning. Trusts allow the IRA owner or plan participant to have beyond-the-grave control over the distribution payments. Recognize reasons trusts are named as beneficiaries Identify the types of trusts used as beneficiaries and their tax characteristics

4:35PM – 5:25PM

Concurrent Sessions (Select One)

EST1811. Hot Estate Tax Audit Issues

To be announced

EST1812. Implications of NIIT

To be announced

4:35PM – 5:25PM

General Session

PIT1805. Reimagine Inclusion

TBD TBD

TBD TBD

TBD TBD

We asked 3 thought leaders in the profession to share how they are “Reimagining” diversity and inclusion – TedTalk style. They have actionable insights on recruiting and retaining diverse talent, how to talk about community polarizing topics in the workplace, and how different organizations define inclusion. This session will include bold, inspiring, and thought provoking ideas on how organizations can realize exponential growth through inclusion.

5:00PM – 5:30PM

WALKING TOUR OF ENGAGE: Learn Where to Be and Why While Capturing Your Steps

Roman Kepczyk CPA.CITP,CGMA,LSS BB Director of Consulting | Xcentric, LLC

Join us for a complimentary Walking Tour of the conference space at the MGM Grand! The Guided Walking Tour provides an overview of the session rooms and conference specific communities in the exhibit hall. Space is limited!

5:30PM – 7:30PM

Exhibit Hall Opening Reception

Tuesday, June 12, 2018

7:00AM – 7:00PM

Registration Open

7:00AM – 8:00AM

Continental Breakfast

7:00AM – 7:50AM

Early Riser

ENG1803. Advanced Fiduciary Accounting

Jackie Patterson Partner | Buchanan & Patterson, LLP
His presentation covers more advanced aspects of fiduciary accounting and some opportunities that are available in a tax regime where it is costly to accumulate
EST18ER05. Session Topic TBD

To be announced

EST18ER06. AICPA Trust, Estate, and Gift Tax Technical Resource

Eileen Sherr Senior Manager | AICPA

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.

In this session, attendees will:

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

EST18ER07. IRA Q&A

To be announced
7:50AM – 8:00AM Change Break
8:00AM – 9:15AM General Session

EST1813. Topic Presented by Bob Keebler

To be announced
PIT1806. Getting Started with Innovation

Mark Brooks AICPA

This interactive, hands-on session provides an introduction into innovation that is applicable for all firm types and sizes. You'll be able to identify why innovation is important and practice techniques to generate and implement new ideas that you can immediately put to use once you return back to the office.

Learning objectives:

- Recognize the importance of innovation
- Identify specific innovation frameworks to use in practice.

9:15AM – 9:30AM Change Break
9:30AM – 10:20AM General Session

ENG1804. IRA and Retirement Planning Update

Ed Slott CPA Partner | Ed Slott & Company

New Tax Law (the Tax Cuts and Jobs Act) Retirement Update: The new tax rules will change the retirement tax and estate planning for virtually every client. The tax rules surrounding IRAs and other retirement accounts are complex and constantly changing. This session will cover the best retirement tax planning strategies, after tax reform, and how to identify the clients who will benefit most from these new planning ideas. The program will also cover several recent tax rule changes that were made through Courts and IRS rulings that are not widely publicized, yet apply to all clients with retirement accounts. Find out the latest in the world of IRA tax planning so you can share this with clients who will be looking to you for guidance on making critical retirement decisions. This will add to your value as a key retirement advisor.

Learning objectives:

- To understand the retirement tax rule changes under the new tax law and help clients benefit from them To identify the best new retirement income and estate planning strategies
- To be aware of the latest tax and IRA distribution decisions from recent cases and rulings. These will apply to your clients who are relying on you for the right advice before making major decisions affecting their retirement savings.
- To learn how to avoid the most costly IRA mistakes made by CPAs. Many of these errors are fatal. They cannot be fixed and the consequences are financially disastrous, to both you and your clients.
- To immediately provide valuable and profitable information to clients who are at risk of making errors. They are not getting this information from their typical financial advisor. Be seen as a proactive retirement advisor, as opposed to reporting on events that happened last year. That's too late.

ENG1805. Must-Haves to Win with Flex

In an employee's market, firms must continually introduce new and innovative employee engagement strategies. At the top of the talent expectations list is the ability to complete work at a time and place of our choosing. This demand for Anytime, Anywhere Work™ is driving CPA firm leaders to give up their attachment to their traditional work values of "face time" and mandated office hours and move to more flexible, virtual and remote work programs.

Attend this session to explore:

- Four "must-haves" to win in a flexible work environment -
 - Trusting first
 - Eliminating mandatory work periods
 - Stomping out sludge
 - Fixing fuzzy delegation and managing with meaningful measures
- The necessary behaviors and mindset to successfully manage flexible work programs
- Specific strategies to help your team deliver services in time and place-independent ways

9:30AM – 10:20AM

Concurrent Sessions (Select One)

EST1814. Navigating the Portability Rules

Jordon Rosen

Director, Estates and Trusts | Belfint,
Lyons & Shuman, P.A.

Portability is a game changer. This session will cover the requirements and technical aspects of making the election, how to prepare Form 706 when making the election, compare portability to using conventional credit shelter trusts, QTIP trusts and QDOTs, state tax issues and basis issues.

Learning objectives:

- Learn how to decide whether making the portability election will benefit the estate compared to other planning techniques.
- Learn how to complete Form 706 to elect portability.

EST1815. Special Tax Considerations Dissolving the Family Partnership

To be announced

EST1816. Estate Planning with IRAs

To be announced

EST1817. Accountants Role n Estate Administration (Basic)

To be announced

9:30AM – 10:20AM

General Session

PIT1807. Peer Review Team Captain Training: Part II

Tom Parry

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. Peer review is undergoing significant change as a result of several key initiatives and it is imperative team and review captains stay current. Both parts, which run back-to-back, must be completed to fulfill the requirement.

Learning objectives:

- Identify new requirements for peer reviewers, including those in the Peer Review Program Manual.
- Identify causes of non-conforming engagements
- Identify areas where peer reviewers often do not comply with relevant peer review guidance.

Learning Objectives:

- Identify new requirements for peer reviewers, including those in the Peer Review Program Manual.
- Identify causes of non-conforming engagements
- Identify areas where peer reviewers often do not comply with relevant peer review guidance.

9:30AM – 10:20AM

General Session

PIT1807. Peer Review Team Captain Training: Part II

Jim Brackens

Vice President - Ethics & Practice Quality
| AICPA

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. Peer review is undergoing significant change as a result of several key initiatives and it is imperative team and review captains stay current. Both parts, which run back-to-back, must be completed to fulfill the requirement.

Learning objectives:

- Identify new requirements for peer reviewers, including those in the Peer Review Program Manual.
- Identify causes of non-conforming engagements
- Identify areas where peer reviewers often do not comply with relevant peer review guidance.

Learning Objectives:

- Identify new requirements for peer reviewers, including those in the Peer Review Program Manual.
- Identify causes of non-conforming engagements
- Identify areas where peer reviewers often do not comply with relevant peer review guidance.

10:20AM – 11:20AM

Networking Break - Refreshments & Vendor Displays

11:20AM – 12:35PM

Concurrent Sessions (Select One)

ENG1806. Nuts and Bolts of the New Lease Accounting Standard

Russ Madray CPA, CGMA

Scholar-in-Residence | Elliott Davis

On February 25, 2016, the FASB issued ASU 2016-02, Leases, culminating a decade long project. The new standard creates Topic 842, Leases, in the FASB Accounting Standards Codification and will supersede FASB ASC 840, Leases.

In this session, we will:

- Explore the nuts and bolts of the new standard, including the debits and credits associated with transition.
- Identify the key measurements and entries required for transition to the new lease accounting standard.
- Describe the key accounts and journal entries required under the new lease accounting standard.

ENG1807. Data Analytics and Visualization

Mark Mayberry CPA/CITP, CISA, CIDA Director, Assurance Office of Tomorrow |
BDO USA, LLP

Learn about the current/future state of data analytics standards, guidance, tools and visualization techniques.

Learning objectives:

- Gain an understanding of the current/future state of data analytics standards and guidance
- Gain an understanding of the current/future state of data analytics and visualization tools and techniques

ENG1808. The State Matters! Education Planning w/ 529s

Brian Boswell President, Founder | 529 Expert, LLC

This panel will provide a brief overview of 529 plans, then dive into plan selection, taking into account state of residence, tax benefits, investment offerings, and plan structure. By the end of this session participants will have an excellent understanding of the benefits of 529 plans, as well as how to select the right plan for their client.

ENG1809. The Hybrid Domestic Asset Protection Trust

Steve Oshins JD Attorney | Oshins & Associates, LLC

The Hybrid Domestic Asset Protection Trust is the leading asset protection vehicle used by planners throughout the country. The presenter will describe why a traditional asset protection trust has potential flaws and how and why a Hybrid version is the better solution. The attendees will leave the session with a heightened knowledge about how to protect assets from creditors and divorcing spouses.

Learning objectives:

- Learn how to explain the Hybrid Domestic Asset Protection Trust technique to clients
- Learn why this technique works so well and how to use this technique to differentiate yourself from your competitors

ENG1810. Stuck in Status Quo (and How to Break Out of It)

Guy Gage Owner | Partners Coach

For some reason, no amount of logic or persuasion can move the people in your firm to do the things that, objectively speaking, are the right things to do. Whether it be around instituting a new process, software or employee-related practice, there is always resistance. This presentation will expound on the primary human and organizational dynamics that make change difficult and how to work with the natural human responses to accelerate change. Drawing on the decades of research in human behavior and motivation, participants will learn how to influence the choices and actions of others to move beyond status quo.

Drawing on human behavior research, participants will understand:

- How change initiatives are perceived as threatening and elicit resistance;
- Apply resistance tendencies to specific individual and firm efforts;
- And learn effective strategies to engage and overcome normal resistance tendencies.

11:20AM – 12:35PM

Concurrent Sessions (Select One)

ENG1811. CPA Firm Recruiting Strategies

Sarah Dobek
President and Founder | Inovautus Consulting

Talent recruitment is critical, and attracting the right talent requires a focused, proactive plan.

In this session, we will discuss:

- How to build a proactive approach to recruiting in your firm and share what innovative firms are doing to recruit staff.
- What attracts the right candidates and how to sell your firm
- How to write attractive job descriptions that sell job openings
- Strategies and tactics for a proactive recruiting effort that works

EST1818. GST Tax Planning, Pitfalls & Pointers

Julie Kwon
Partner | McDermott Will & Emery, LLP

This program will provide guidance in translating theoretical rules to actual practice regarding preparation of the Form 709, recent trends in planning and reporting issues, changes to grandfathered or exempt trusts and options to address prior mistakes.

Learning objectives:

- To learn about affirmative, timely, automatic and late allocations of GST exemption.
- To learn about planning issues regarding uses of GST exemption and changes to

EST1819. How Irrevocable Grantor Trusts Affect the Accounting Community

To be announced

EST1820. Pitfalls in the Preparation of Form 1041

Jeremiah Doyle LL.M. (Taxation)
Senior Vice President | BNY Mellon Wealth Management

Tax reform just made the preparation of the Form 1041 more challenging.

This session will discuss:

- The most common pitfalls that CPAs will encounter in preparing the Form 1041 including the new rules for the taxation of pass-through entities.
- Learn the most common pitfalls in preparing a Form 1041
- Learn how the new rules on taxation of pass-through entities apply to the taxation of estates and trusts

11:20AM – 12:35PM

General Session

PIT1808. Becoming a Firm with a Future

Jason Deshayes

AICPA

Lisa Simpson CPA, CGMA

Associate Director, Firm Services Public
Accounting | AICPA

To be announced

12:35PM – 1:50PM

Networking Lunch

12:50PM – 1:40PM

Bonus Lunch Session

EST18NL01. Estate Planning for Digital Assets

To be announced

EST18NL02. Hollywood's Take on Estate Planning

Missia Vaselaney JD, (inactive) CPA Attorney | Taft Stettinius & Hollister, LLP

Get ready for your close-up and take a fun and education break from the conferences more technical sessions to find out how estate planners can use movies to illustrate estate planning concepts to clients and move the process forward.

- An evaluation of Hollywood's portrayal of estate planners, and estate and probate matters
- An evaluation of Hollywood's effect on popular culture and client expectations
- Advice on how estate planners can use movies to illustrate estate planning concepts to clients and move the process forward

12:50PM – 1:40PM

EST18SS02. Solution Session TBA

To be announced

1:50PM – 3:05PM

Concurrent Sessions (Select One)

ENG1812. Alternatives to GAAP: The FRFs Formerly Known as OCBOA

Robert Durak CGMA

Karen Kerber

Alternative financial reporting frameworks are growing in popularity among entities that are not required to use GAAP. Increasingly complex accounting standards are leading some practitioners to consider non-GAAP frameworks as preferred choices for their clients' financial reporting needs.

Learning objectives:

- Learn about these frameworks in this timely session.
- Gain an understanding of the fundamental and important principles of non-GAAP financial reporting frameworks
- Learn how non-GAAP financial reporting frameworks differ from GAAP and when their use is appropriate

ENG1813. Professional Skepticism

Steven Glover

To be announced

ENG1814. Planning for Aging & Ill Clients

Bernard Krooks

Founding Partner | Littman Krooks, LLP

This session will focus on issues that affect our clients as they age. With the enhanced federal estate tax exemption, many clients are now more concerned with how to obtain and pay for long-term care. The speaker will address the different types of long-term care available and the various financing options available. Relevant tax considerations will also be discussed.

Learning objectives:

- Learn how to advise clients concerned about how to pay for long-term care
- Learn how to advise clients on how to plan for incapacity.

1:50PM – 3:05PM

Concurrent Sessions (Select One)

ENG1815. Emotional Intelligence - One of the Single Biggest Predictors of Success in Life

Dennis Faurote CPA

President | The Faurote Group

Emotional Intelligence is so critical to success that it accounts for over 60% of performance in all types of jobs. It's the single biggest predictor of performance in the workplace and the strongest driver of leadership and personal excellence. Emotional intelligence is a set of emotional and social skills that collectively establish how well we:

- Perceive and express ourselves
- Develop and maintain social relationships
- Cope with challenges
- Use emotional information in an effective and meaningful way.

In today's environment one way to set yourself apart is by having a high 'EQ,' which is a measure of your "emotional intelligence." By enhancing your understanding of your own emotions and those of others and taking them into account when interacting, you can have a positive effect on relationships, business results, commitment, and teamwork. This program highlights the connection between emotions and actions and helps you identify ways to improve your EQ and develop more productive relationships both professionally and personally.

- Understand why emotional intelligence is important to effective leadership
- Identify and learn how to apply the four key emotional competencies: self-awareness, self-management, social awareness, and relationship management
- Discuss activating events and the impact on the physical, mental and social well-being, as well as, ways to manage emotions to achieve positive results
- Develop ways to read others' emotions and adapt to their needs
- Develop a model for overcoming challenges both at home and at work
- Recognize the impact that EQ abilities have on your professional development and career
- Learn strategies to help you manage counterproductive tendencies

EST 1821. Professional Collaboration - Team Approach to Estate Planning

Jordon Rosen

Director, Estates and Trusts | Belfint, Lyons & Shuman, P.A.

Susan Tillery

Paraklete Financial, Inc. President

Gary Zwick

Walter Haverfield LLP Partner

This session will emphasize the importance of collaboration and using the team approach to estate planning. It will look at who should be at the planning table, roles, responsibilities, how to be client-centric, use of engagement letters, cooperation, communication and trust among team member to best serve the client.

Learning objectives:

- Participants will learn why the team-approach benefits both the client and the professionals.
- Participants will learn how to deal with uncooperative professionals in the estate planning process.

EST1822. Advanced Post Mortem Planning

Jeremiah Doyle LL.M. (Taxation)

Senior Vice President | BNY Mellon
Wealth Management

Some of the most important tax planning occurs after a client dies. This session will discuss advanced tax planning elections available after a client dies.

The session will include the changes that the CPA must know as a result of the recent tax reform bill.

- Learn how the new tax reform legislation affects after death tax planning – what has changed and what hasn't changed
- Learn the available after death elections available to the executor or trustee

EST1823. Valuation

Mark Higgins

President | Higgins, Marcus & Lovett, Inc.
Partner | Ramsbacher Prokey Leonard,
LLP

John Prokey

To be announced

1:50PM – 3:05PM

General Session

PIT1809. The Future of Finance

To be announced

3:05PM – 4:05PM

Networking Break – Refreshments & Vendor Displays

4:05PM – 4:55PM

Concurrent Sessions (Select One)

ENG1816. Servant Leadership

Dennis Faurote CPA

President | The Faurote Group

In today's world, we are continually looking for the latest leadership "theories" that we can implement that will make us better leaders, help motivate others and get them to follow our lead. Yes, you need to be intelligent, effectively communicate, have experience and other leadership qualities but those will only get you so far. The proven way to positively influence others and get them to "want" to follow you is to "Serve" them. In this session, we will define "Servant Leadership" and identify steps to take to become a Servant Leader.

Learning objectives:

- Define Servant Leadership
- Discuss qualities of a Servant Leader
- Answer the question, 'Why should I follow you?'
- Dispel common leadership myths
- Discuss if you are a Servant Leader
- Learn the difference between leading and managing
- Identify the process for developing Leadership skills

EST1824. IRA and Death

To be announced

EST1825. Estate Planning with no Children: Married and Single

Missia Vaselaney JD, (inactive) CPA Attorney | Taft Stettinius & Hollister, LLP

In this session the speaker will discuss the various options available when planning for client's who don't have children. The attendee will learn why planning for such clients is usually more difficult than planning for client's with children. The attendee will learn various options to help achieve the client's positive goals.

EST1826. Ethics and Circular 230

To be announced

EST1827. Impact of AI on Our Profession

Wenli Wang CPA Partner | Moss Adams

technology and development in AI on our profession. Learn how you can adapt to these changes and the new skills needed to keep ahead of the game.

4:55PM – 5:10PM

Change Break

5:10PM – 6:00PM

Concurrent Sessions (Select One)

EST1828. State Trust Tax Planning Issues

Christopher Campbell Deloitte

Jack Trachtenberg Deloitte

To be announced

EST1829. Modifying an Irrevocable Trust with Decanting and other Alternatives

Heidi Freeman JD Member | Oshins & Associates, LLC

Courtney McCandless JD Associate | Oshins & Associates, LLC

Kristen Simmons JD Member | Oshins & Associates, LLC

In the Modifying an Irrevocable Trust with Decanting and other Alternatives Session, the speakers will discuss ways to modify irrevocable trusts to make them 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 or non-judicial modification.

Learning objectives:

- Review the process of decanting and different state law approaches to decanting
- Review optimal trust design for creditor, income tax and estate tax purposes
- Discuss other methods to modify an irrevocable trust if decanting is not an option.

5:10PM – 6:00PM

Concurrent Sessions (Select One)

EST1830. Update on Estate & Gift Tax Hill Issues

To be announced

ENG1817. Planned Giving Vehicles for High Net Worth Clients

To be announced

5:10PM – 6:00PM

General Session

PIT1810. Nurturing the CPA Pipeline: Confidence M.O.D.E.

Jena Burgess

Confidence M.O.D.E. (Mastery, Obstacles, Determination, Execution) is an informative discussion about the way confidence impacts our lives. Research shows positive affirmation isn't the formula, we must take action and teach ourselves new patterns to change behavior. Participants learn how to evaluate and build the components of their own Confidence M.O.D.E: Mastery, Obstacles, Determination, Execution. There are distinct differences for women and men when it comes to their relationship with confidence. Applying the Confidence M.O.D.E. to our efforts in engaging and inspiring young professionals and aspiring accountants is critical to the accounting profession's efforts to recruit and retain talent.

Learning objectives:

Program participants will be able to:

- Gain clarity on the definition of confidence and how it is displayed in today's world and within Accounting.
- Recognize a personal mental model of confidence and some relevant realities of the human experience that will empower.
- Set confidence goals and commit to an action plan.
- Integrate tactics of the Confidence M.O.D.E. into profession-wide efforts to nurture talent through all stages of the accounting pipeline.

6:00PM – 7:00PM

Reception

Wednesday, June 13, 2018

7:00AM – 6:00PM

Registration Open

7:00AM – 8:00AM

Continental Breakfast

7:00AM – 8:00AM

CPAFMA CHAPTER LEADERS ONLY: Chapter Leadership Breakfast

Tiffany Taft

CPAFMA Chapter leaders are invited to this annual recognition breakfast where ideas will be shared and the Chapter of the Year will be recognized.

8:00AM – 9:15AM

ENG18K02. ENGAGE KEYNOTE

Barry Melancon

To be announced

9:15AM – 9:30AM

Change Break

9:30AM – 10:20AM

ENG18K03. ENGAGE KEYNOTE:

Originals: How Non-Conformists Move the World

Adam Grant

To survive and thrive, organizations need original thinking. Yet most individuals stay silent instead of voicing their best ideas—and many leaders stifle dissent rather than encouraging it. Drawing on his blockbuster new book, *Originals*, Adam Grant explores how we can all get better at recognizing and championing new ideas, how to overcome fear and doubt and how to build cultures that welcome diverse perspectives and honest feedback. He reveals why late entrants typically beat first movers, friendly managers end up being the least supportive, devil's advocates often backfire but contrarian opinions are useful even when they're wrong, and the values that help organizations prosper early on are the same ones that thwart their growth later. Grant's insights on unleashing originality have been praised by J.J. Abrams, Richard Branson, Malcolm Gladwell, Sheryl Sandberg and Peter Thiel, and this talk brings them to life in ways that are both surprising and entertaining.

9:30AM – 10:20AM

General Session

EST1831. The Continuing Saga of Tax Legislation

Harry Gutman

Of Counsel | Ivins, Phillips & Barker,
Chartered

This session is a review of recent and pending tax legislation. Understand the tax legislative process.

Learning objectives:

- Understand the substance of proposed and recently enacted tax legislation
- Understand the revenue, economic and distributional effects of proposed and recently enacted tax legislation

10:20AM – 11:05AM

Networking Break - Refreshments & Vendor Displays

11:05AM – 12:20PM

General Session

ENG1818. Standard Setting Activities of the Auditing Standards Board and the Accounting and Review Services Committee

Mike Santay CPA

Chairman | Grant Thornton, LLP

Mike Fleming CPA

Principal | Rehmann Robson, LLC

Mike Glynn

Senior Manager - Audit & Attest Stds |
AICPA

The Chairs of the ASB and the ARSC as well as a senior manager from the AICPA's Audit and Attest Standards Team will discuss recently issued standards for audits (SASs), preparation, compilation, and review engagement (SSARSs), and attestation engagements (SSAEs). The presenters will also discuss the ASB's and the ARSC's active agendas including ongoing efforts to enhance the standard setters' outreach to stakeholders regarding proposed standards and post-implementation reviews of issued standards. Also featured will be a discussion of the current status of the ASB's projects to:

- Revise and expand the auditor's report
- Focus auditor attention on financial statement disclosures as part of the risk assessment process and throughout the audit process
- Revise the attestation standards to enable a practitioner to perform an examination, review, or agreed-upon procedures engagement without having to request a written assertion from the responsible party
- Revise the auditor's performance and reporting responsibilities with respect to ERISA audits

Discussions will also include:

- The joint ASB/ARSC project to provide greater flexibility for practitioners performing agreed-upon procedures engagements
- Continuing practice issues with respect to engagements to prepare financial statements as well as preparation and compilation of prospective financial information in accordance with SSARS 23
- Recently issued SSARS 24

11:05AM – 12:20PM

Concurrent Sessions (Select One)

[ENG1819. Managing Sequences of Return Risk in Retirement](#)

Michael Kitces MSFS, MTAX, CFP, CLU, Publisher | Partner | Nerd's Eye View | ChFC, RH
Pinnacle Advisory Group

For long-term investors, the reality is that even if markets are volatile for a period of time, as long as the portfolio stays invested, returns can average out in the long run. In the case of retirees, however, ongoing spending withdrawals introduce the possibility that if the portfolio experiences weak returns early on, it could be depleted entirely before the good returns finally show up. As a result, retirees must consider this "sequence of returns" risk when planning for retirement, and strategies to manage it, from reducing spending in the first place, to engaging in more dynamic asset allocation to reduce risk exposure, or dynamic spending strategies to adapt spending withdrawals to market changes along the way!

Learning objectives:

- Understand what sequence of return risk is, and how it affects a retirement portfolio
- Know the origin of the "safe withdrawal rate" and how to apply it in today's low-return environment
- Be able to compare different types of dynamic asset allocation strategies and ways to create spending "floors" for retirees
- Be able to apply dynamic spending strategies with clients, and understand how to set the parameters for retirees to manage along the way

[EST1832. Medical Planning/Long-Term Care Planning](#)

To be announced

[EST1833. Document Review for CPAs](#)

Missia Vaselaney JD, (inactive) CPA Attorney | Taft Stettinius & Hollister, LLP

Gain practical and useful knowledge of estate planning documents as you:

- Review actual paragraphs from wills and trusts
- Discuss tax and non-tax issues
- Obtain a checklist of specific items to address with clients

ENG1820. Debunking the Myths

Richard Oshins

Partner | Oshins & Assoc., LLC

The trajectory of our duties and responsibilities toward clients and others is evolving in a sharp upward spiral. Expanding theories of liability have contributed to a huge increase in malpractice actions against estate planners.

Learning objectives:

- It is reasonable to assume that CPAs have an affirmative duty to raise planning opportunities with their clients? Since estate planners seek to be, and hold themselves out as being, “the client’s wealth planning advisor”, increasingly courts will hold them to a high standard, especially if there is confirmation in their promotional materials.
- CPAs often advise clients who are fiduciaries and many CPAs act as fiduciaries. Under certain rules, such as the “Duty of Loyalty”, the prohibitions are very strict and liability exists even if the advisor acts in good faith and beneficiaries receive increased benefits.
- What advice and strategies should you be telling your client and, if not mentioned and challenged, is it defensible?

EST1834. Charitable Issues

Ted Batson CPA, JD

Partner/Tax Counsel | CapinCrouse LLP

This session will update participants on current developments in charitable giving.

Participants will:

11:05AM – 12:20PM

General Session

PIT1811. IdeaAcct

Vince LoRusso

Alexandra Connell

James Dowd

Emily Dear

Rachel Gregg

IdeaAcct: Great ideas always create new realities!

The pace of change today is greater than anything the profession has ever seen before. The accounting profession will probably look very different in 10+ years than it does today. To better understand the opportunities these changes create, sometimes it is helpful to consider the perspective of those outside our profession. At IdeaAcct, you will hear from 4 startup companies that have a role in creating new futures for the accounting profession. Hear their understanding of trends in the accounting space and be inspired to think differently about how you approach your business. Startups include the members of the 1st Association and CPA.com Startup Accelerator cohort.

12:20PM – 1:45PM

Networking Lunch

12:50PM – 1:40PM

Bonus Lunch Session

EST18NL03. Common Estate Planning Mistakes

To be announced

EST18NL04. How to Build an Estate Planning Practice as a CPA

To be announced

12:50PM – 1:40PM

Solutions Session

EST18SS03. Solution Session TBA

To be announced

1:45PM – 3:00PM

Concurrent Sessions (Select One)

ENG1821. The Dialog between QC & CAS Leaders

Sharon Berman CGMA

Mike Glynn

Principal | Rehmann

Senior Manager - Audit & Attest Stds |
AICPA

Compilation, preparation – is there really a difference? There is! But many firms' QC leaders are applying the same standards to both engagements which prevents the client accounting service (CAS) leaders from leveraging the competitive offering available with preparation services. In this session, Mike Glynn, senior manager audit and attest standards team with AICPA, and Sharon Berman, principal with Rehmann, will help clarify the nuances and provide practical guidance to streamline preparation engagements while complying with standards.

ENG1822. Tax-Efficient Retirement Withdrawals

Steve Siegel J.D., LLM (Taxation)

President | The Siegel Group

The session will address up to date tax and financial planning for the most efficient and appropriate withdrawals from retirement plans.

Learning objectives:

- Gain insight into financial planning considerations for efficient retirement withdrawals.
- Understand the latest tax law requirements for withdrawals from retirement plans.

EST1835. Why Community Property is Relevant for all CPAs

Jackie Patterson

Partner | Buchanan & Patterson, LLP

This session discusses the characterization of property as community and its impact both inside and outside community property states.

Learning objectives:

- To understand the basic components of community property.
- To distinguish the importance of state law.
- To analyze the tax and non tax issues related to community property.

EST1836. Estate Planning for Large Estates

The Trump Tax Act substantially increased the amount of gift and estate tax exemption available for each person. The changes expire after 2025. Now what do we do? Do we hurry and make gifts? Do we wait? Do we make gifts but draft the trusts differently to provide flexibility? Which leveraging techniques do we use? How do they work? Steve Oshins will discuss all of this!

Learning objectives:

- Learn how to take advantage of the new tax laws, but also build flexibility into the plan to make adjustments as the tax laws continue to change.
- Learn how to explain the advanced estate planning techniques to your clients.

EST1838. When Family Office Meets Philanthropy

Eric Johnson

Partner | Deloitte Tax, LLP

Ted Batson CPA, JD

Partner/Tax Counsel | CapinCrouse LLP

A case study approach to issues that arise when family office meets philanthropy. Jane and Eric will introduce you to a sample family office and guide you through issues the family office faces in supporting the philanthropic needs of the family it serves.

Including:

- Implementing systems that effectively support philanthropy and avoid impermissible activities
- How the family office can support tax efficient charitable giving of non-cash contributions
- An examination of concerns around sharing of facilities and staff with charitable entities
- Co-investment challenges between family members and philanthropic vehicles

Learning objectives include:

- Informing participants, through a case study approach, on issues impacting family offices in certain philanthropic situations
- Educating participants to identify (and mitigate) identified issues

EST1838. When Family Office Meets Philanthropy

Jane Searing CPA M.S. Taxation

Shareholder | Clark Nuber, PS

A case study approach to issues that arise when family office meets philanthropy. Jane and Eric will introduce you to a sample family office and guide you through
Change Break

3:00PM – 3:15PM

3:15PM – 4:05PM

Concurrent Sessions (Select One)

ENG1823. New Lease Standards – Tools - PART 2

Jeremy Dillard CPA, CGMA

Partner | SingerLewak, LLP

Mathew Wilson CPA, CMS, CGMA

Shareholder | Wilson Ivanova CPAs

With the session you will gather and understand the requirements for the new lease standards. We will discuss implementation and provide tools to use for training your staff including samples of before and after balance sheets, the impact on the financial statements and disclosures.

Learning objectives:

- Gain an understanding of the new standards and the impact of financial reporting
- Leave with samples and a basic implementation training guide to train your staff and clients

ENG1824. Estate Planning for the 99%

Steve Siegel J.D., LLM (Taxation)

President | The Siegel Group

Address the estate and tax planning issues that the vast majority of our clients face on a regular basis – what they are and how we can advise them.

Learning objectives:

- Gain an appreciation of what most of our clients need to consider for their estate planning issues
- Address special tax planning opportunities for the majority of our clients.

3:15PM – 4:05PM

General Session

PIT1804. When Generations Connect: Communicating Across Generational Divides

Phil Gwoke

Four distinct generations are working together shoulder to shoulder, each with a unique set of attitudes, values and work styles. It used to be that older workers were bosses and younger ones took orders. Now, roles are all over the board and rules are being rewritten. Organizations are feeling the pain of generations as they struggle to manage productivity and morale while maintaining high standards of quality and service in a challenging economy. When Generations Connect demonstrates not only why it's important to understand what shaped the generations, but why they behave the way they do.

Learning objectives:

Program participants will be able to:

- Identify how generation gaps hit the bottom line
- Learn what to do about the approaching talent gap
- Understand the keys to retaining the generations
- Convert this form of diversity from an obstacle into an opportunity.

4:05PM – 4:35PM

Networking Break - Refreshments & Vendor Displays

4:35PM – 5:50PM

Concurrent Sessions (Select One)

ENG1825. CyberSecurity Advisory & Attest Services - What are They and How Can You Monetize them for Your Practice

Jim Bourke

To be announced

ENG1826. Audit of the Future: Myth or Reality?

Alan Anderson CPA, CGMA

President | ACCOUNT-ability Plus

Audit clients continue to become more global, diverse and technology reliant while the audit methodologies used by most firms hasn't fundamentally changed in 25 years. While there has long been discussion that the future audit will shift from attesting on past results once per year to delivering real time assurance very little has been accomplished to date. This session will discuss approaches to better integrating technology into the audit process, accessing clients data and that can be leveraged through use data analytics. Leveraging "big data" through use of "data analytics in our audit processes are sure to be foundational to the audit of the future. This session will layout a model for how that could work, the potential benefits, and the current barriers around moving this from myth to reality. During this session real life examples of what is being accomplished will be presented.

ENG1827. Social Security the only annuity all clients count on

Ted Sarenski CPA/PFS,CFP,AEP,CGMA CEO | Blue Ocean Strategic Capital

Social Security is the base of everyone's retirement yet is the least understood by most clients. Learn the ins and outs of the system and how to best advise your clients of the optimal claiming strategies.

Learning objectives:

- Learn how best to advise your clients when to begin benefits
- Learn about all the other aspects of Social Security other than retirement benefits what might happen to Social Security in the future.

ENG1828. NING Trusts After Tax Reform: Saving State Income Taxes

Steven Oshins JD

Attorney | Oshins & Associates, LLC

Tax reform limits the federal income tax deduction for state and local taxes paid to only \$10,000 per year. Suddenly, the most important annual planning for many of our clients involves saving state income taxes since they are mostly non-deductible now. This change in the law brings the NING Trust into the mainstream as a necessary vehicle for more of our clients than ever before. Learn to spot the opportunities to use a NING Trust for your clients. Learn how and why a NING Trust works to save or avoid state income taxes.

4:35PM – 5:50PM

General Session

PIT1813. Brand You: Mastering Image in a Digital World

Jonathan Cox

AICPA

Cheryl Wipper

AICPA

Some brands are almost universally recognizable. With just a glance at their logo, you know precisely the level of service or quality of product you will get. With the growth of digital and social media, personal brands can be just as recognizable. Get started and develop "Brand You" using tips and tricks learned in this session.

5:50PM – 7:30PM

Reception in Exhibit Hall

8:30PM – 10:00PM

CPAFMA FIRM LEADERS ONLY: NIGHT CAP WITH DESSERT BAR

Thursday, June 14, 2018

7:00AM – 5:00PM

Registration Open

7:00AM – 8:00AM

Continental Breakfast

7:00AM – 7:50AM

Early Riser

ENG1829. Feedback and Coaching for Leaders in Today's Talent Management Environment

Barbara Mackintosh

Executive Director | TalentQuest

Done RIGHT, feedback can be an essential tool that drives development, performance, and engagement. Unfortunately, many managers have not been provided with education and training on how to leverage this essential tool. As companies move to more frequent coaching-based models of continuous performance management, enhancing your ability to deliver feedback and coach for development can drive employee engagement and business results.

In this session, we'll discuss:

- The ROI of feedback - and why (despite the data) we still don't do enough of it
- A step-by-step approach to delivering effective feedback and having a coaching conversation
- Typical reactions to feedback and how you should (and shouldn't!) handle them and common mistakes that prevent feedback from having a positive impact
- How to make feedback a natural and consistent resource rather than an "event"

ENG1830. Intentional Influence

Dan Griffiths CPA, CGMA

Partner - Strategy & Leadership | Tanner, LLC

Leadership is intentional influence. If our efforts as a leader are not leading to behavior change, then we're not leading. We are much more blind than we may think when it comes to the influences that shape human behavior. Effective leaders of change become skilled at identifying those influences and leveraging them in getting the results they want to achieve. During this session, we'll take an understanding of the best behavioral science research and help you apply it in the context of your current change management challenges.

Learning objectives:

- Apply an understanding of behavioral science to leadership
- Develop a plan for exercising more influence as a leader.

7:50AM – 8:00AM

Change Break

7:00AM – 7:50AM

General Session

PIT1814. The Social Trifecta: Owned, Earned and Paid

Liz Rock

AICPA

Stacie Saunders

AICPA

Establishing a presence on social media is just the first step in a journey. The three ways an audience discovers your channels and content is a product of a formula made up of owned, earned and paid media. Join us for insights into how these three components work and how they should fit into your marketing and communications plans.

8:00AM – 9:15AM

ENG18K04. ENGAGE KEYNOTE

To be announced

9:15AM – 9:30AM

Change Break

9:30AM – 10:45AM

General Session

PIT1815. Customer Experience: What Your Clients Really Think About the Way You do Business

Jonathan Cox

AICPA

Cheryl Wipper

AICPA

One of the most important parts of an organization is the relationship they keep with customers. Understanding your clients journey from the beginning can inform business decisions and shape the mission of your organization. Learn what you have to gain from focusing and refining your clients' experience.

10:45AM – 11:15AM

Networking Break - Refreshments & Vendor Displays

11:15AM – 12:05PM

General Session

PIT1816. Inclusion vs Assimilation for the Multi-Generational Workforce

Joe Gerstandt

Like many other professions, the accounting profession is in a war for talent. Therefore, maximizing and retaining talent is significant if we are to effectively compete in today's marketplace. "Inclusion vs Assimilation for the multigenerational workforce" looks at the most common and fundamental barriers to providing an inclusive employee or stakeholder experience. Inclusion, properly understood, is inherently active. It is not a product of values or intentions, but of choices, actions and behaviors. We will consider the difference between inclusion and assimilation, its various impacts of the five generations in the workplace today and specifically the roles played by unwritten rules, and unconscious or implicit bias. Participants will leave this presentation with both individual and organizational practices to implement.

Learning objectives:

Program participants will be able to:

- Understand the difference between work environments that promote inclusion versus those environments that foster assimilation
- Recognize barriers to an inclusive organizational culture and experience
- Understand the impact that inclusion and assimilation have on the different generations in today's workplace.

12:05PM – 1:15PM

Lunch

1:15PM – 2:30PM

Concurrent Sessions (Select One)

ENG1831. Practitioners Roundtables:

(1) Human Resources, (2) Technology, (3) Business Development

Practitioners Roundtable to facilitate discussion on Human Resources, Information Technology and Business Development

Learning objectives:

- Discuss best practices in internal CPA Firm management and administration
- Learn from experiences of other participants.

ENG1832. Practitioners Roundtables:

(1) Human Resources, (2) Technology, (3) Business Development

Roman Kepczyk CPA,CITP,CGMA,LSS
BB

Director of Consulting | Xcentric, LLC

Practitioners Roundtable to facilitate discussion on Human Resources, Information Technology and Business Development

Learning objectives:

- Discuss best practices in internal CPA Firm management and administration
- Learn from experiences of other participants.

ENG1833. Practitioners Roundtables:

(1) Human Resources, (2) Technology, (3) Business Development

Practitioners Roundtable to facilitate discussion on Human Resources, Information Technology and Business Development

Learning objectives:

- Discuss best practices in internal CPA Firm management and administration
- Learn from experiences of other participants.

1:15PM – 2:30PM

General Session

PIT1817. Differentiate Yourself with Designations, Credentials, Certificates and Digital Badges

Barbara Andrews	AICPA
Carey Mitchell	AICPA
Eva Simpson	
Dan Snyder	AICPA

Pursuing a new designation, credential or certificate can be a challenging journey. Almost as challenging as figuring out where to start and which one to select! Having a deep knowledge in a subject area helps you provide the best possible insight for your clients and uphold your role of protecting the public interest.

Attend this session to:

- Recall research on how obtaining a designation, credential or certificate can bolster your career
- Recognize how to differentiate yourself from your peers and competitors by demonstrating commitment to quality
- Outline a professional development plan to obtain a new designation, credential or certificate
- Define the critical knowledge and skills that employers are looking for and be ready to work in any business
- Large or small, public or private, all around the world.
- Identify existing and new Association, CIMA and AICPA designations, credentials or certificates
- Recall new requirements and expanded opportunities for credential holders to develop the professional competencies necessary to support continued success in their specialized area of practice.

2:30PM – 2:45PM

Change Break

2:45PM – 4:00PM

General Session

ENG1834. Inspector Gadget

Gizmos and gadgets have become an indispensable part of our digital lives – ever transforming the way we work, play and live. From cloud computing, mobile and hybrid devices to entertainment, home automation and the Internet-of-Things – every aspect of our days are impacted by the latest technology offerings. Join Inspector Gadget as he shares cutting edge tech trends and the hottest gear that every user will want to consider in the months ahead.

Learning objectives:

- Understand the latest technology trends and the impact these trends will have on next generation devices
- Identify where to wisely invest in new technology, and what to avoid

PIT1818. Believe It: Practical A&A Standards Implementation for Small Firms

Mike Austin CPA

Senior Technical Manager | AICPA

Kari Hipsak

AICPA

A simplification of the new standards: A&A toolkits for Small Firms.....Join us as we provide a quick overview of the hottest new accounting standards governing leases, revenue, and not-for-profits as well as the non-GAAP alternative, FRF for SMEs, in as close to plain English as we can get. You'll walk away with a high-level idea of what's coming up in these standards, as well as the tools available to you to help explain these standards to your clients, coworkers, or your friends (if you are looking for a quick way to end those friendships).

4:00PM – 4:15PM

Change Break

4:15PM – 5:05PM

General Session

ENG1835. 50 Innovative Ideas and Practices in 50 Minutes

James Fahey

Chief Learning Officer | HBK CPAs & Consultants

We often attend seminars and look for key points to take back to our firms for implementation. This session is solely devoted to that in the practice management arena. This is an interactive session where audience members will share innovative ideas they do at their firms with the group. Assistants will pass out notecards at the beginning for attendees to record ideas and then have the opportunity to share via microphones in the audience. All the ideas shared will be transcribed for distribution amongst the attendees. Jim Fahey will moderate the session and get us to 50 top ideas....and maybe beyond!

Learning objectives:

- This session will give attendees a toolkit of new and innovative ideas and practices to implement at their firms in the area of practice management

PIT1819. CPA Powered, A Small Firm's Secret Weapon

Stacie Saunders

AICPA

Lisa Simpson CPA, CGMA

Associate Director, Firm Services Public Accounting | AICPA

Want to know the secret to attracting and retaining clients? It's all in how you present your value and the services you provide. When you have plug-and-play brochures, videos and checklists from the AICPA #CPAPowered national awareness campaign, promoting yourself to clients and prospective clients is that much easier. Learn how to access and use these valuable resources for your next marketing effort.

