


Schedule at a glance

7:30 - 8:00 am	Registration and Continental Breakfast	
8:00 - 9:15 am	General Session	
	<div>1. The Current State and Future Direction of EBPA: A DOL Update AU </div> <div>Marcus Aron, CPA, CGMA, U.S. Department of Labor</div> <div><ul style="list-style-type: none">Focus on legislative and regulatory developments and how they impact current and future audits.Explore leading practices and procedures firms are implementing, including risks auditors should be aware of.Discuss the latest reporting compliance initiatives.</div>	
9:15 - 9:25 am	Networking break	
9:25 - 10:40 am	<div>2. Accounting, Auditing and the New Reporting Framework Update AU </div> <div>James Merklin, CPA, CFE, CFF, CGMA, MAcc, Bober Markey Fedorovich & Company</div> <div>Michelle Buckley, CPA, AIFA, Vice President, Meaden & Moore</div> <div><ul style="list-style-type: none">Review newly issued ASUs and ASUs effective for 2019 audits.Gain an understanding of the new EBPA reporting framework by reviewing the standard, guidance and next steps for successful implementation.Identify compliance “hot spots” auditors should look for as they navigate audits.</div>	
10:40 - 10:50 am	Networking break	
10:50 - 11:40 am	<div>3. Taking the Risk out of Risk Assessment AU </div> <div>Dana Howell, CPA, director, Sikich LLP</div> <div>Bradley Eberhard, CPA, principal, Clark Schaefer Hackett & Co.</div> <div><ul style="list-style-type: none">Identify key steps to perform when assessing and responding to risk of material misstatements (RMMs).Review common areas of nonconformity and misconceptions in performing risk assessments.Walk through steps to take to help your firm evaluate whether the risk assessment standards have been met, including peer review guidance.</div>	
11:40 am - 12:25 pm	Lunch	
12:25 - 1:15 pm	<div>Plan Compliance</div> <div>4. The Tax Side of EBP Compliance AU </div> <div>David Reyes, CPA, Maloney + Novotny, LLC</div> <div><ul style="list-style-type: none">Highlight the purpose of the Form 5500, including recent developments and what retirement plan professionals need to know about them.Discuss current developments within employee benefit plans including the SECURE Act and IRS updates.Examine common employee benefit plan compliance and tax nuances.</div>	<div>Bootcamp (12:25 - 3:15 pm)</div> <div>5. Auditing Employee Benefit Plans Bootcamp AU </div> <div>Marilee Lau, CPA, Marilee Lau CPA</div> <div>Lynne McMennamin, supervisory reporting and compliance specialist, U.S. Department of Labor, EBSA</div> <div><ul style="list-style-type: none">Distinguish the differences between employee benefit plan types.Identify audit areas unique to employee benefit plans and review procedures for the specialized audit areas. This will include example testing in audit areas, such as participant data, contributions, benefit payments and subsequent events to help you gain an understanding of key audit deficiencies.</div>
	1:15 - 1:25 pm	
1:25 - 2:15 pm	<div>6. Working With the Service Providers: Build Your Rapport AU </div> <div>Suzy Walch, CPA, audit associate, Plante Moran, PLLC</div> <div>Brian Hanna, AIF, partner, EVP-Retirement Plans, Everhart Advisors</div> <div><ul style="list-style-type: none">Identify ways to mitigate common deficiencies discovered during an audit.Discuss the responsibilities of a plan sponsor and administrator, including tips and best practices.Gain an understanding of the communication required by the auditors.</div>	
	2:15 - 2:25 pm	
2:25 - 3:15 pm	<div>7. Cybersecurity and Fraud: Where Are We Now AU </div> <div>Paul Hugenberg III, CPA, CISSP, CRISC, CISA, principal, cyber services team, Rea & Associates</div> <div>Shawn Richardson, principal, cyber services team, Rea & Associates</div> <div><ul style="list-style-type: none">Dive into cybersecurity protocols for reducing the risk of cyber-attacks on an organization’s benefit plan.Discuss the importance of plan sponsors to establish a plan for how to respond when a breach does occur.Examine employee benefit plan fraud case studies.</div>	
3:15 - 3:25 pm	Networking break	
3:25 - 4:15 pm	<div>8. Evolving Technology’s Impact on the Audit AU </div> <div><ul style="list-style-type: none">Explore developments in technology that are being used in audits today and what’s on the horizon.Assess the impact of technologies on benefit plans and their audits, including both advantages and challenges.Pinpoint a range of in-demand skills, including critical thinking and data analysis as they relate to the future of EBP audit procedures.</div>	

Employee Benefit Plan Audit Conference

Details

Date: April 24, 2020

Time: 8:00 am – 4:15 pm
(registration begins at 7:30 am)

Credits: 8

Webcast: #54002

Registration

Full Name

Society ID/Email*

Business Name

Business Address

City

State Zip Fax

Phone After Hours Phone

Special Needs

Course confirmations will be sent via email. In the event the Society does not have an email address for you on file, confirmation will be mailed USPS.


Registration Options

<input type="checkbox"/> Regular \$554	<input type="checkbox"/> Member \$399
Save \$50 when you register before April 1 at the early member discount rate!	
<input type="checkbox"/> Early discount \$504*	<input type="checkbox"/> Early member discount \$349*


Select Sessions

8:00 – 9:15 am	<input type="checkbox"/> 1	12:45 – 3:15 pm	<input type="checkbox"/> 5
9:25 – 10:40 am	<input type="checkbox"/> 2	1:25 – 2:15 pm	<input type="checkbox"/> 6
10:50 – 11:40 am	<input type="checkbox"/> 3	2:25 – 3:15 pm	<input type="checkbox"/> 7
12:25 – 1:15 pm	<input type="checkbox"/> 4	3:25 – 4:15 pm	<input type="checkbox"/> 8

Payment Information

 **ONLINE**
To register and pay online, visit www.ohiocpa.com/EBPA

OR

 **MAIL**
Return this form no later than April 1, 2020 with a check made payable to The Ohio Society of CPAs to:

The Ohio Society of CPAs
4249 Easton Way
Suite 150
Columbus, OH 43219

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