



2019
Cleveland
Accounting Show

Embrace change | Enrich skills | Excel

Oct. 29-30, 2019



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THE
OHIO SOCIETY
OF CPAs

ADVANCING THE STATE OF BUSINESS



“

This was the absolute best Accounting Show I have attended. Every tax class was valuable and will help me in my practice.

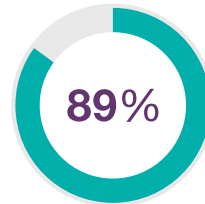
Very good combination of relevant, diverse subjects. Presentations I attended were up-to-date for today's world...not a rehash.

This was by far the best show I attended (this year)... The speakers were professional, the data was relevant and the facilities were accommodating.

”



100% of those surveyed said they received beneficial information and/or actionable ideas from last year's event.



89% of surveyed attendees rated the 2018 Accounting Shows as "good or excellent" as well as the approximate amount of value they took away from what was provided.

..... EMBRACE change | ENRICH skills | EXCEL

The Cleveland Accounting Show is not just a two-day event. This signature conference is packed with the topics and learning you need to enhance your personal and professional success in 2019. The sessions have been strategically designed to help you embrace change, enrich your skill set and excel.

We appreciate the opportunity to help you enhance your skills. Whether you're in corporate or public accounting, you'll find quality learning built in response to the latest industry trends and emerging issues.

There are so many sessions to choose from, but we've highlighted a few to help you get started!

CORPORATE

Hot Topics!

Session 15: BI Deep Dive

Session 38: Strategic Cost Transformation

Session 44: Current Examples, Applications, and Implementation of Blockchain and Cryptocurrency Tools

Session 48: Personal Wealth Creation Planning

PUBLIC ACCOUNTING

Hot Topics!

Session 24: Auditing Standards Update

Session 35: Taking the Risk Out of Risk Assessment

Session 40: Pricing on Purpose: Implementing Value Pricing in Your Firm

Session 53: Future of Audit: Staying Ahead Amid Rapid Changes

KEY TECHNICAL UPDATES

Session 4: Accounting Standards Update: What You Need to Know

Session 11: Mastering the Lease Standard

Session 41: Navigating the Tax and Accounting Implications of Cryptocurrencies

Session 52: State & Local Tax Implications from Federal Tax Reform

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SESSION & SPEAKER Spotlight



Session 34: Individual Tax Strategies

Cynthia Kula, CPA, PFS, CFP, director, tax services, Walthall Rea

With more than 40 years of public accounting experience, Cindy has spent most of her time concentrating in taxation. She regularly assists clients with tax, financial and estate planning. Cindy also oversees quality control for the tax department. She specializes in partnership and corporate tax law. Cindy is a frequent speaker to and writer for industry and community groups, trade associations, the OSCP, and Lorman Educational Services. In addition, Cindy is a member of the American Institute of CPAs, The Ohio Society of CPAs, and the OSCP Scholarship Committee and has served on the strategic planning committee of Parma City Schools.



Session 44: Current Examples, Applications and Implementation of Blockchain and Cryptocurrency Tools

Dr. Sean Stein Smith, CPA, CGMA, assistant professor, Lehman College

Sean is an expert and sought-after speaker focusing on the intersection of financial services, blockchain and cryptocurrencies. He is a regular contributor to IBM's official Blockchain Unleashed website and a regular expert guest on China Global TV Network discussing blockchain and related applications. Sean is a member of the Advisory Board for the Wall Street Blockchain Alliance. His analysis and thought leadership in the blockchain and cryptocurrency area have been featured in dozens of articles.



Session 6: Data Communication

Robert Coppedge, MCITP, MCT, MCTS, MCSE, MCDBA, CEO, Simplex-IT

Bob Coppedge is the founder and CEO of Simplex-IT, an IT organization that essentially is the IT department for small-medium organizations throughout Northeast Ohio. Bob also spent 14 years as Chief Information Officer at Patio Enclosures Inc. in Macedonia, and was IT Manager for the City of Cleveland Heights before that.



Session 48: Personal Wealth Creation Planning and Session 54: Funding Investment with Cash Flow

Perry Jeffries III, CRPC, CPFA, PES, president, Diamond Equity Advisors

Perry brings a unique blend of subject matter expertise in two areas that are important to people's lives: financial adviser and personal trainer. With a combined 35 years of experience in fitness and finance, he speaks to diverse audiences on a variety of topics ranging from financial planning and literacy to corporate leadership and personal development.



Session 9: The Five Pillars of a Future-Ready Firm, Session 12: Let's Get Uncomfortable: A Look at New Management Techniques and Session 19: The Key to Team Productivity - Collaboration

Jon Hubbard, director of business development, Boomer Consulting, Inc.

Jon Hubbard, Director at Boomer Consulting helps accounting firm leaders find success in the areas of leadership, talent and growth. Jon is a facilitator for the Boomer P3 Leadership Academy, Boomer Talent Circle and Boomer Marketing & BD Circle (launching Fall 2019). He also guides firms to grow and be more effective in the areas of client service, marketing and business development.

NETWORKING & BUSINESS

Development Opportunities



The exhibit hall is not just the place to find cutting-edge solutions and ideas for your professional and business needs. It's your chance to enhance your business development skills with professionals who are at the top of their networking game. Bring plenty of business cards to share as you check out the latest technologies, products and services. Discover how you can amplify your own business and stay ahead of the curve in this evolving and competitive business environment.

Why should I walk the exhibit hall?


















- **Get ahead, stay ahead.** The exhibit hall is an easy way to browse options and opportunities that can help you do things faster, smarter, better.
- **Convenient and helpful.** It's rare to get an in-person opportunity to connect with so many experts all in one place. Seize the day and build your network!
- **Connections are powerful.** The essence of networking is to gain connections that can help advance your career or business. Even if the products aren't a fit for you or your company, they might be the perfect fit for someone else you know. Remember, knowledge is power.
- **Great prizes and swag.** From cool gadgets to prizes, you've got to walk it to win it.
- **Visit with vendors such as:** GilsbarPro, CPACharge, Saling Simms, Brunswick Companies, Robert Half, Paychex, The Ahola Corporation, RCG Tax Partners, CRU Solutions, Simplex Solutions and more!

THANK YOU to our Event Supporters



OCT. 29 – Schedule at a glance

7:00 am	Registration and Breakfast			
	Ethics & Governance	Accounting & Finance Leadership	Strategic Management	Niche Learning
7:45-9:00 am	1. How Brand Value Impacts Company Value CM <i>Lisa Morales Cook, Senior VP, Fahlgren Mortine</i> <ul style="list-style-type: none"> Dissect the Brand Value Pyramid and its correlation to and implications for your company. Discover why well-branded companies have a brand value of 60-75% of book value. Assess your company's brand and explore how to grow its value. 		2. Accounting for the Automotive Industry AC <ul style="list-style-type: none"> Understand the accounting updates specific to the automotive industry. Explore how technology can transform current accounting processes for your automotive business. Identify how new audit standards and tax reform affect the automotive industry. 	
9:20-10:35 am	5. Ohio CPA Professional Standards and Responsibilities RE (9:20 am - 12:10 pm) <i>Tiffany Crosby, CPA, MBA, CTP, CGMA, director, learning, The Ohio Society of CPAs</i> <ul style="list-style-type: none"> Walk through practical applications of the Ohio Revised Code (ORC) and the Ohio Administrative Code (OAC) in our modern environment. Examine the concept of ethics, ethical drift and the ethical decision-making process. Engage in an interactive review of the licensing, ethics and independence rules that apply to Ohio CPAs. 	6. Data Communication EM <i>Robert Coppedge, MCITP, MCT, MCCTS, MCSE, MCDBA, CEO, Simplex-IT</i> <ul style="list-style-type: none"> Identify the characteristics of useful data for your organization. Explore the different methods of communicating data to make it more actionable. Learn how to analyze and use the information from your data to drive business performance. 	7. Keeping Relationships Healthy With CRM BM <i>Garrett Wagner, CPA, CITP, CEO, C3 Evolution Group</i> <ul style="list-style-type: none"> Analyze the CRM technology solutions available to capture data about your customers/clients. Identify data points that would be helpful in building stronger relationships. Discuss how relationship building is changing in the profession. 	8. Construction Contractors: Accounting and Financial Reporting Update AC <ul style="list-style-type: none"> Discuss GAAP and recent changes to financial reporting affecting the construction industry. Highlight key items to consider when applying the new revenue recognition standard. Dig into compliance issues unique to the construction industry.
10:55 am-12:10 pm		12. Let's Get Uncomfortable: A Look at New Management Techniques PD <i>Jon Hubbard, director of business development, Boomer Consulting, Inc.</i> <ul style="list-style-type: none"> Understand how technology and demographics are driving change in management techniques. Discover how the breakdown of hierarchy and the building of collaboration and distributed authority can empower leadership in all levels of the organization. Grasp the correlation between leadership and high performance. 	13. Exiting: Maximize Business Valuation BM <i>Craig Hohnberger, owner, Buji ActionCoach</i> <ul style="list-style-type: none"> Tackle the six steps of minimizing risk and maximizing valuation within a business. Identify the two crucial roles an owner must maintain until exit. Find out how your business can create true generational wealth. 	14. Accounting for the Health Care Industry BM <ul style="list-style-type: none"> Understand how to master costing challenges specific to the health care industry. Explore how technology can transform current accounting processes.
12:10-1:15 pm	Lunch			
1:05-2:35 pm	18. A Framework for a Successful Recovery From a Disaster or Cyber Incident IT <i>Mike Moran, president, Affiliated Resource Group</i> <ul style="list-style-type: none"> Break down the definition of a disaster/cybersecurity incident, the potential causes and what your organization needs to do to "protect." Dissect the similarities between disaster recovery and cybersecurity planning and the value each provides to your organization. Develop a framework for outlining roles and responsibilities, prevention protocols and methods for recovering from an incident. 	19. The Key to Team Productivity – Collaboration PD <i>Jon Hubbard, director of business development, Boomer Consulting, Inc.</i> <ul style="list-style-type: none"> Delve into the strategies and tools that will help you formulate a culture based on collaboration. Identify strategic planning, performance management and accountability that will ensure your organization is poised for future growth and profitability. Outline an action plan to get started. 	20. Engage: Workforce, Productivity and Accountability PD <i>Craig Hohnberger, owner, Buji ActionCoach</i> <ul style="list-style-type: none"> Engage in the 21 keys to energize your workforce. Find out ways to evaluate people and establish peer-to-peer accountability. Learn to quickly move the needle of engagement at your organization. 	21. Successful Succession Plans: Puzzle Pieces to Coordinate with Your Estate & Disability Plan TX <i>James Stimler, Esq., attorney and owner, Stimler Law Office</i> <ul style="list-style-type: none"> Examine how to properly coordinate business ownership-operating frameworks, a business owner's Estate & Disability Plan and avoid probate court. Explore issues affecting fiduciaries/agents; leases; chain of command; professional licenses; DPOA, TOD, POD; self-dealing and use. Identify when to use Ohio Legacy (Asset Protection) Trusts and the Ohio Family Trust Company Act framework.
2:55-4:25 pm	25. Emerging Trends in Data Privacy: How to Protect Your Organization's Data EM <i>Jacob Nix, CPA, CISA, president and COO, RISC Point Advisory Group</i> <ul style="list-style-type: none"> Discuss current and planned data privacy regulations and review leading examples of data privacy failure. Explore how data privacy can affect your organization in the current climate. Walk through how to perform a high-level risk profile for your organization to pinpoint data privacy gaps. 	26. Third-Party Risk Management MS <ul style="list-style-type: none"> Pinpoint areas where third parties are essential to your organization's strategic and tactical decisions. Learn how to avoid damages to your bottom line and reputation by creating a process to oversee your third-party relationships. Dive into due diligence procedures pre- and post-contract that will enhance your risk management model. 	27. Inclusive Environment HR <ul style="list-style-type: none"> Highlight characteristics that cause a barrier to an inclusive environment. Understand the true meaning of an inclusive environment. Differentiate diversity from inclusion. 	28. Preparing for the New Credit Loss Model AC <ul style="list-style-type: none"> Understand the implications of the CECL standard and how it impacts financial reporting, including disclosures, and performance. Identify best practices to implement the standard and explore how the new standard will change business processes. Pinpoint additional financial reporting changes on the horizon and their impact to financial institutions.

	Technology Application & Risk Management	Tax Compliance	A&A Compliance
7:55-9:10 am	3. Leveraging Tax Technology  <p><i>Timothy Hatcher, CPA, tax senior manager, BDO USA LLP</i></p> <ul style="list-style-type: none"> Review emerging technologies and gain a deeper understanding of analytics, data inefficiencies and robotic process automation. Discuss how to tackle common tax challenges by leveraging technologies. Evaluate leading practices and lessons learned, along with examples of technologies in action. 		4. Accounting Standards Update: What You Need to Know   <p><i>Chad Kolde, CPA, senior manager, Barnes Dennig & Co.</i></p> <ul style="list-style-type: none"> Unpack recently issued or effective accounting standards, with emphasis on significant issuances like revenue recognition. Delve into major developments important to the profession and review lessons learned from implementation of significant standards. Pinpoint ways to prepare yourself now for future updates, activities and requirements.
9:30-10:45 am	9. The Five Pillars of a Future-Ready Firm  <p><i>Jon Hubbard, director of business development, Boomer Consulting, Inc.</i></p> <ul style="list-style-type: none"> Uncover the five pillars of a future-ready firm: process, talent, leadership, technology and growth. Learn why these areas matter and how to better connect the dots between each of them. Focus on why firm IT transformation is needed, including business case examples. 	10. The Future of Tax Compliance  <p><i>Justin Breidenbach, CPA, CFE, MAcc, professor of accounting, Ohio Wesleyan University</i></p> <ul style="list-style-type: none"> Dissect the ongoing complexities of tariff increases. Assess tax regulation requirements for the legalized marijuana industry. Understand risk exposure as it pertains to your organization in this new tax environment. 	11. Mastering the Lease Standard   <p><i>John Krizansky, CPA, principal, HW&Co</i></p> <ul style="list-style-type: none"> Determine how implementation of the new standard will impact the balance sheet, income statement and cash flow statements. Delve into application of the new standards using examples. Outline tips to tackle now to ensure compliance and a smooth implementation in the effective year.
11:05 am-12:20 pm	15. BI Deep Dive   <p><i>Chris Ortega, MBA, senior finance manager, Emarsys</i></p> <ul style="list-style-type: none"> Explore in depth the strengths, weaknesses and challenges for BI Garter leader technologies. Examine how these technologies can prepare you, your team and organization for digital readiness. Learn to embrace the future of BI and how accounting and finance teams can help lead the charge. 	16. Maximizing Ohio Sales/Use Tax Exemptions  <p><i>Steven Dimengo, CPA, J.D., MT, partner, Buckingham, Doolittle & Burroughs, LLC</i></p> <ul style="list-style-type: none"> Address core exemptions and how they can be maximized, including the Cincinnati Reds' bobbleheads resale exemption for promotional items. Discuss favorable classification as a business fixture when used in an exempt manner. Review hidden exemptions in otherwise taxable services. 	17. Update on Compilation and Review Engagements  <p><i>Victoria Pitkin, CPA, director of quality control, Ostrow Reisin Berk & Abrams, LTD</i></p> <ul style="list-style-type: none"> Probe the latest developments and issues relevant to compilation and review engagements, including peer review. Unpack recent SSARS, accounting and reporting developments. Pinpoint the professional standards and risk factors relevant to the performance of these engagements.
1:15-2:45 pm	22. Finance Evolution - AI & ML  <p><i>Chris Ortega, MBA, senior finance manager, Emarsys</i></p> <ul style="list-style-type: none"> Evaluate AI and ML solutions existing in accounting and finance. Assess how AI and machine learning will impact people, process and performance strategies. Gauge team and organizational readiness for AI and ML. 	23. Legislative and Regulatory Update  <p><i>Barb Benton, CAE, VP, government relations, The Ohio Society of CPAs</i> <i>Gregory Saul, Esq., CAE, director, tax policy, The Ohio Society of CPAs</i></p> <ul style="list-style-type: none"> Gain insights into timely state and federal legislative issues. Analyze regulatory reforms at the Ohio Department of Taxation and Accountancy Board of Ohio. Review state and federal judicial decisions impacting tax developments. 	24. Auditing Standards Update   <p><i>Chad Kolde, CPA, senior manager, Barnes Dennig & Co.</i></p> <ul style="list-style-type: none"> Assess the effect of recently issued auditing standards and guidance as well as challenges in auditing accounting methods for recently effective FASBs, including revenue recognition. Become familiar with exposure drafts and other projects in auditing. Obtain the most up-to-date information you need to conduct successful audits and provide high-quality services to your clients.
3:05-4:35 pm	29. Deep Dive: Internet of Things  <p><i>Andrew Smith, liaison, InnovateOhio</i></p> <ul style="list-style-type: none"> Identify new vulnerabilities exposed by the internet of things. Discover how to leverage IOT to your advantage. Review best practices for safeguarding your organization against data breaches. 	30. Economic Incentives & Tax Credits  <p><i>Stephen Palmer, CPA, senior manager, SALT, Plante Moran PLLC</i> <i>Adam Burgess, VP, transaction management, Plante Moran Cresa</i></p> <ul style="list-style-type: none"> Delve into Ohio tax credits and incentives in four major areas: job creation and retention, capital investment, job training, and innovation. Discuss developments in federal programs and assess impact in Ohio. Explore how to incorporate these credits and incentives into tax planning strategies. 	31. Not-For-Profit Financial Reporting Update  <p><i>Brian Todd, CPA, audit shareholder, Clark Schaefer Hackett & Co.</i></p> <ul style="list-style-type: none"> Dissect expected changes from the implementation of ASU 2014-09, ASU 2016-14 and ASU 2018-08. Review what a financial statement looks like under new FASB standards. Walk through how to transition and comply successfully under these standards.

OCT. 30 – Schedule at a glance

7:00 am	Registration and Breakfast			
	Financial Planning & Analysis	Professional Skills	Technical Finance & Accounting Skills	Niche Learning
7:45-9:00 am	32. Uncovering Efficiency: Project and Time Management EM <i>Timothy Kloppenborg, Ph.D., PMP, Kloppenborg & Associates</i> <ul style="list-style-type: none"> Determine how to identify the right project management technology for your organization. Examine how project and time management can increase team efficiency. Analyze how to structure processes into a timeline with adequate milestone tracking. 		33. Advanced Excel for Finance IT <ul style="list-style-type: none"> Uncover new and improved ways to use pivot tables. Identify techniques to improve the accuracy of spreadsheets. Learn about formulas that can improve the efficiency of time in Excel. 	
9:20-10:35 am	36. Financial Data Analytics: Microsoft Power BI Workshop FI (9:20 am - 12:10 pm) <i>Scott Vess, CPA, CMA, vice president, finance & treasurer, American Modern Insurance Group</i> <ul style="list-style-type: none"> Find out how to build interactive, visually appealing dashboards in Power BI. Discuss how to transform structured and unstructured data from multiple sources and build scalable models in Power Pivot. Learn to deploy multiple dashboards to various devices, including laptops, tablets and mobile phones. 	37. Real Talk: Engaging in Conversations That Matter CM (9:20 am - 12:10 pm) <i>Tiffany Crosby, CPA, MBA, CFP, CGMA, director, learning, The Ohio Society of CPAs</i> <ul style="list-style-type: none"> Uncover the seven steps of conducting powerful conversations. Evaluate frameworks for crafting a shared purpose and consensus. Review techniques to stay in dialogue amid conflict and create a safe space for conversations with differing opinions or heightened emotions. 	38. Strategic Cost Transformation AC <i>Reginald Lee, PhD, professor, Williams College of Business, Xavier University</i> <ul style="list-style-type: none"> Learn how decisions that positively affect profit can negatively affect cash. Discern how to transform cost/profit models into those that highlight cash, capacity and cost. Explore the role multi-dimensional models play in creating alignment between operations and accounting. 	39. Rethinking Performance: Turning Talent Into Performance HR <i>Jennifer Gesing, VP of sales, Ohio, ADP Joe Ashdown, VP Ohio Major Account Service, ADP</i> <ul style="list-style-type: none"> Examine how to transform individual and natural talent into extraordinary performance. Gain insights on how to create a culture that develops better leaders, higher engagement and more performance. Understand how performance and engagement happen or fail to happen on teams.
10:55 am-12:10 pm			42. Evolving Necessity: Strategic Thinking Skills PD <ul style="list-style-type: none"> Identify necessary inputs to make sound decisions. Understand the evolution of critical thinking skills in the profession today. Connect company goals and values in decision making processes. 	43. ERISA Fiduciary Training and Risk Mitigation EM <i>Mario Giganti, CPA, CFP, AIFA, Cornerstone Advisors</i> <ul style="list-style-type: none"> Understand the roles, responsibilities and expectations of retirement plan fiduciaries. Learn the specific fiduciary framework required to demonstrate a prudent investment process for retirement plans. Apply fiduciary best practices to mitigate personal and organizational liability.
12:10-1:10 pm	Lunch			
1:00-2:30 pm	47. Thinking Beyond Patterns: Finding Meaning in Your Data AU <i>Toby Groves, PhD, MS, president, Groves Research and Consulting</i> <ul style="list-style-type: none"> Explore thinking approaches that support deeper insight into the meaning behind information. Find out how to detect unusual patterns through data screening methods and how to deal with contradictory evidence. Develop skills that boost your understanding of meaning behind complex connections. 	48. Personal Wealth Creation Planning FI <i>Perry Jeffries III, CRPC, CPFA, PES, president, Diamond Equity Advisors</i> <ul style="list-style-type: none"> Outline the components of a holistic financial plan. Walk through choosing the right investments for your financial plan. Learn about the types of insurance products that are missing from your plan. 	49. An Executive Primer to Mergers & Acquisitions EM <i>Kenneth Haffey, CPA, CVA, partner, Skoda Minotti, CPAs Dave Mustin, MBA, partner, Skoda Minotti, CPAs</i> <ul style="list-style-type: none"> Provide an overview of the components of the M&A life-cycle. Describe the process of valuing a business and the importance of managing and transforming the business beyond Day 1. Review case studies of successfully bought, sold, transformed and advised businesses. 	50. Inventory Management: Solving Optimization Challenges to Increase Profits EM <ul style="list-style-type: none"> Explore how the global economy and multi-channel buyer environments are challenging the order management and inventory management processes. Identify the key to successful inventory optimization as well as common barriers. Discuss tools and systems to support high performing supply chains.
2:50-4:20 pm	54. Funding Investment With Cash Flow FI <i>Perry Jeffries III, CRPC, CPFA, PES, president, Diamond Equity Advisors</i> <ul style="list-style-type: none"> Examine the concept behind the profit-first bank accounting method. Determine when to invest and stay in cash. Discover how to systematically pay off debt. 	55. Meta Thinking: The New Critical Thinking AU <i>Toby Groves, PhD, MS, president, Groves Research and Consulting</i> <ul style="list-style-type: none"> Delve into new thinking approaches that improve critical thinking and judgment. Understand how to examine the relevance, reliability and validity of evidence. Consider how to assess the quality of your own reasoning, including contextual/situational awareness and implicit bias. 	56. Budgeting and Operating Performance Evaluation FI <i>Jeffery Enyart, CPA, CLU, ChFC, CPCU, CGMA, Avastar CPA & Consulting Inc.</i> <ul style="list-style-type: none"> Explore the various financial and non-financial purposes of budgeting. Find out the differences between correlation and causation. Discuss best practices when operating performance deviates from budgeting, including communicating to stakeholders. 	57. Governmental Auditing Standards: Compliance Update AV <ul style="list-style-type: none"> Get a high-level briefing on the activities of standard-setting bodies and regulators impacting compliance audits. Evaluate the changes to the new yellow book, compliance supplement and data collection form. Discuss common quality issues and tips for avoiding them.

	Trends to Watch	Tax Planning & Risk Management	Accounting & Auditing Risk Management
7:55-9:10 am	34. Individual Tax Strategies  <p><i>Cynthia Kula, CPA, PFS, CFP, director, tax services, Waltham Rea</i></p> <ul style="list-style-type: none"> Assess the impact of tax reform on the 2018 filing season, including highlights from the new Form 1040 and schedules. Highlight individual tax and financial planning opportunities to consider year-round. Evaluate top planning strategies and tips for taking action before year end. 		35. Taking the Risk Out of Risk Assessment   <p><i>Carl Mayes, CPA, associate director, CPA quality & evolution, AICPA</i></p> <ul style="list-style-type: none"> Uncover misconceptions in applying AU-C Sections 315 and 330 that are having a major impact on audit quality. Understand the intent of the Standards and discuss practical application in audits. Discover tips and tools that can be used to enhance risk assessments and how to capture clients increased dependency on technology.
9:30-10:45 am	40. Pricing on Purpose: Implementing Value Pricing in Your Firm   <p><i>Ronald Baker, CPA, founder, VeraSage Institute</i></p> <ul style="list-style-type: none"> Understand the business model behind value pricing vs. hourly billing. Discuss how to value your services and what questions you should be asking. Assess behavioral economics, marketing strategy, and customer psychology, and how these principles should be applied to pricing. 	41. Navigating the Tax and Accounting Implications of Cryptocurrencies    <p><i>Dennis Murphy, CPA, senior manager, Skoda Minotti</i> <i>Nicholas Ward, senior staff accountant, Skoda Minotti</i></p> <ul style="list-style-type: none"> Get an overview of cryptocurrency and the basics of blockchain, including legislation and government activity. Delve into use cases and their impact on tax and accounting departments. Highlight the importance of being prepared for increased usage of digital assets, including internal controls and reporting requirements. 	
11:05 am-12:20 pm	44. Current Examples, Applications and Implementation of Blockchain and Cryptocurrency Tools   <p><i>Dr. Sean Stein Smith, CPA, CGMA, assistant professor, Lehman College</i></p> <ul style="list-style-type: none"> Know where to go to receive current updates and news related to cryptocurrency and blockchain applications in the U.S. Examine and analyze cryptocurrency and blockchain implementation underway in the Ohio business community. Articulate, explain and analyze what current trends and directions mean for blockchain-based cryptocurrency tools. 	45. Impact of Tax Reform on Businesses and Business Owners  <p><i>Don Stanovcak, J.D., manager, national tax office, Plante Moran PLLC</i> <i>Zachary Youseff, CPA, manager, tax, Plante Moran PLLC</i></p> <ul style="list-style-type: none"> Assess the impact tax reform had on the 2018 tax season. Pinpoint key takeaways to better position your business for the next filing season. Review tips for avoiding common pitfalls identified during the most recent filing season. 	46. Emergence of Integrated Reporting  <ul style="list-style-type: none"> Evaluate how current reporting models are being challenged. Discuss the disruption of current reporting models after reviewing value creation concepts. Identify how to implement Integrated Reporting by learning how it links strategy, purpose and value together.
1:10-2:40 pm	51. Economic Update  <p><i>James Saling, CIMA, CPWA, president and principal, Saling Simms Associates</i></p> <ul style="list-style-type: none"> Get an overview of the current state of the economy. Highlight new trends in the economy that will impact Ohio. Understand how recent updates in the economy will affect the profession. 	52. State & Local Tax Implications from Federal Tax Reform   <p><i>Mary Jo Dolson, CPA, partner, Skoda Minotti, CPAs</i></p> <ul style="list-style-type: none"> Assess the varying approaches states are taking toward conformity with the Tax Cuts and Jobs Act. Review key corporate tax issues affecting states. Dive into post-Wayfair compliance challenges and highlight the different economic nexus thresholds and effective dates. 	53. Future of Audit: Staying Ahead Amid Rapid Changes   <ul style="list-style-type: none"> Explore accounting and auditing trends in the areas of technology, methodology, standards, and skills. Assess the impact that continuous monitoring and assurance will have on financial statement audits. Pinpoint a range of in-demand skills like critical thinking and data analysis as they relate to your future.
3:00-4:30 pm	58. Robotic Process Automation Fundamentals and Strategy  <p><i>Hiral Rao, senior manager, advisory, Ernst & Young LLP</i></p> <ul style="list-style-type: none"> Gain an understanding of robotic process automation technology and its risks, opportunities, and organizational impact. Learn how to identify and prioritize the business processes that are most suitable for automation. Discover key considerations needed to build a business case for automation. 	59. Social Security for CPAs: Planning for Today and Tomorrow  <p><i>Brandon Smith, BA, public affairs specialist, Social Security Administration</i></p> <ul style="list-style-type: none"> Discuss changes to the social security program and how it works today. Review implications for planning strategies. Uncover myths and misinformation related to Social Security benefits. 	60. Leading Practices for Third Lines of Defense  <p><i>Protiviti Inc.</i></p> <ul style="list-style-type: none"> Promote a common understanding of the role of each of the three lines of defense in managing an organization's risk. Explore the role of internal audit as the third line of defense, and discuss the forces increasingly calling for internal audit professionals to embrace innovation in its mission to provide assurance services. Share insights, generate discussion and discuss common challenges associated with the three lines of defense risk model.

EVENT Details

Date: Oct. 29-30, 2019

Time: 7:45 am – 4:30 pm (registration begins at 7:00 a.m.)

Credits: up to 16 credits in multiple areas

Location:

I-X Center
6200 Riverside Drive
Cleveland, OH 44135

Complimentary Accounting Show parking
is available at the I-X Center.

Phone: 1.216.676.6000

www.ixcenter.com

Hotel

The Society has secured a block of king/double rooms at a preferred rate of \$119. Please make your reservations by Oct. 18 and indicate you are with The Ohio Society of CPAs to receive the preferred rate. Reservations placed after Oct. 18 are subject to availability.

Sheraton Cleveland Airport Hotel
5300 Riverside Dr.
Cleveland, OH 44135

Phone: 216.267.1500

Community Give Back

We love our members and want to give back to the communities they call home. You can help! We will have pre-cut blankets for children at the OSCP registration desk. All you have to do is tie the ends to make them whole and ready to use. Finish as many as you can and we'll donate them to a local charity.

New This Year - DAY ONE ONLY!



Complimentary professional head shots to be offered during networking breaks and lunch. More details to be provided in your attendee program guide.

Both days

Oct. 29-30, 2019

Product #52689

<input type="checkbox"/> Non-member \$624	<input type="checkbox"/> Member \$469
Save more than 30% when you register before October 1 at the member rate!	
<input type="checkbox"/> Early non-member \$574	<input type="checkbox"/> Early member \$419

Single day

Day one (Oct. 29) only: Product #52690

Day two (Oct. 30) only: Product #52691

<input type="checkbox"/> Non-member \$494	<input type="checkbox"/> Member \$339
Save more than 40% when you register before October 1 at the member rate!	
<input type="checkbox"/> Early non-member \$444	<input type="checkbox"/> Early member \$289

Register today at



ohiocpa.com/OAS2019

Contact information

Society ID # (found on the back cover with address) _____

Full Name _____

Email _____

Firm _____

Business Address _____

City _____ State _____ Zip _____

Phone _____

After Hours Phone _____

Special Needs _____

Payment information



ONLINE

To register and pay online, visit
www.ohiocpa.com/OAS2019

OR



MAIL

Return this form no later than Oct. 1, 2019 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

Day 1

7:45 – 9:00 am

1. How Brand Value Impacts Company Value **CM**

2. Accounting for the Automotive Industry **AC**

7:55 – 9:10 am

3. Leveraging Tax Technology **TX**

4. Accounting Standards Update: What You Need to Know **AC** 🔥

9:20 - 10:35 am

5. Ohio CPA Professional Standards and Responsibilities **RE** (9:20 am - 12:10 pm)

6. Data Communication **EM**

7. Keeping Relationships Healthy With CRM **EM**

8. Construction Contractors: Accounting and Financial Reporting Update **AC**

9:30 – 10:45 am

9. The Five Pillars of a Future-Ready Firm **EM**

10. The Future of Tax Compliance **TX**

11. Mastering the Lease Standard **AC** 🔥

10:55 am - 12:10 pm

12. Let's Get Uncomfortable: A Look at New Management Techniques **PD**

13. Exiting: Maximize Business Valuation **EM**

14. Accounting for the Healthcare Industry **EM**

11:05 am – 12:20 pm

15. BI Deep Dive **IT** 🔥

16. Maximizing Ohio Sales/Use Tax Exemptions **TX**

17. Update on Compilation and Review Engagements **AU**

1:05 – 2:35 pm

18. A Framework for a Successful Recovery From a Disaster or Cyber Incident **IT**

19. The Key to Team Productivity – Collaboration **PD**

20. Engage: Workforce, Productivity and Accountability **PD**

21. Successful Succession Plans: Puzzle Pieces to Coordinate With Your Estate & Disability Plan **TX**

1:15 – 2:45 pm

22. Finance Evolution - AI & ML **IT**

23. Legislative and Regulatory Update **TX**

24. Auditing Standards Update **AU** 🔥

2:55 – 4:25 pm

25. Emerging Trends in Data Privacy: How to Protect Your Organization's Data **EM**

26. An Executive Primer to Mergers & Acquisitions **MS**

27. Inclusive Environment **HR**

28. Preparing for the New Credit Loss Model **AC**

3:05 – 4:35 pm

29. Deep Dive: Internet of Things **IT**

30. Economic Incentives & Tax Credits **TX**

31. Not-For-Profit Financial Reporting Update **AC**

Day 2

7:45 – 9:00 am

32. Uncovering Efficiency: Project and Time Management **EM**

33. Advance Excel for Finance **IT**

7:55 – 9:10 am

34. Individual Tax Strategies **TX**

35. Taking the Risk Out of Risk Assessment **AU** 🔥

9:20 – 10:35 am

36. Financial Data Analytics: Microsoft Power BI Workshop **FI** (9:20 am - 12:10 pm)

37. Real Talk: Engaging in Conversations That Matter **CM** (9:20 am - 12:10 pm)

38. Strategic Cost Transformation **AC** 🔥

39. Rethinking Performance: Turning Talent Into Performance **HR**

9:30 – 10:45 am

40. Pricing on Purpose: Implementing Value Pricing in Your Firm **EM** 🔥

41. Navigating the Tax and Accounting Implications of Cryptocurrencies **TX** **AC** 🔥

10:55 am – 12:10 pm

42. Evolving Necessity: Critical Thinking **PD**

43. ERISA Fiduciary Training and Risk Mitigation **EM**

11:05 am – 12:20 pm

44. Current Examples, Applications and Implementation of Blockchain and Cryptocurrency Tools **IT** 🔥

45. Impact of Tax Reform on Businesses and Business Owners **TX**

46. Emergence of Integrated Reporting **AC**

1:00 – 2:30 pm

47. Thinking Beyond Patterns: Finding Meaning in Your Data **AU**

48. Personal Wealth Creation Planning **FI** 🔥

49. An Executive Primer to Mergers & Acquisitions **EM**

50. Inventory Management: Solving Optimization Challenges to Increase Profits **EM**

1:10 – 2:40 pm

51. Economic Update **EC**

52. State & Local Tax Implications from Federal Tax Reform **TX** 🔥

53. Future of Audit: Staying Ahead Amid Rapid Changes **AU** 🔥

2:50 – 4:20 pm

54. Funding Investment with Cash Flow **FI**

55. Meta Thinking: The New Critical Thinking **AU**

56. Budgeting and Operating Performance Evaluation **FI**

57. Governmental Auditing Standards: Compliance Update **AV**

3:00 – 4:30 pm

58. Robotic Process Automation Fundamentals and Strategy **IT**

59. Social Security for CPAs: Planning for Today and Tomorrow **TX**

60. Leading Practices for Third Lines of Defense **AU**

Register before October 1 and
SAVE MORE THAN \$50



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