

Schedule at a glance

AC Accounting
FI Finance
MS Management Services
RE Regulatory Ethics
SK Specialized Knowledge
TX Taxes

HOT TOPICS

for CPAs Virtual Conference

DETAILS

Date: May 20, 2021
Time: 8:00 a.m. – 4:20 p.m.
Product: #55054



REGISTRATION OPTIONS

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7:30 - 8:00 a.m.	Webcast Open	
8:00 - 8:50 a.m.	1. Developing Liminal Leadership During Disruption MS <i>The Telos Institute</i> <ul style="list-style-type: none"> Develop the strategy and mindset needed to accelerate growth and drive organizational performance during disruption. Evaluate the potential of liminal moments and dissect how the pandemic has brought about positive transformation and how to leverage that as a leader. Learn how to curate liminal learning within teams and organizations and how this can impact culture changes. Discuss how work strategies may look different post-pandemic. 	
8:50 - 9:00 a.m.	Break	
9:00 - 9:50 a.m.	2. Ohio CPA Professional Standards and Responsibilities RE <i>Justin Breidenbach, CPA, CFE, MAcc, Associate Professor of Accounting, Ohio Wesleyan University</i> <ul style="list-style-type: none"> Delve into the principles of conduct and ethics rules applicable to CPAs. Identify conceptual frameworks and tools to aid in application of rules and principles. Analyze cases to apply principles of conduct and ethics rules to real scenarios. 	3. Controllers Update: Planning for Opportunities and Challenges MS <i>Jim Lindell, CPA, CSP, CGMA, President, Thorsten Consulting</i> <ul style="list-style-type: none"> Examine the role of strategic planning and contingency planning to prepare your organization for threats and opportunities. Discuss major trends in technology and how to prepare your organization to stay relevant and find competitive intelligence. Review tools to forecast changes in the economy and their relation to your operation results.
9:50 - 10:00 a.m.	Break	
10:00 - 10:50 a.m.	2. Ohio CPA Professional Standards and Responsibilities <i>(continued)</i>	3. Controllers Update: Planning for Opportunities and Challenges <i>(continued)</i>
10:50 - 11:00 a.m.	Break	
11:00 - 11:50 a.m.	2. Ohio CPA Professional Standards and Responsibilities <i>(continued)</i>	4. Data Driven Accountant: Keep and Grow Existing Customers MS <i>Jim Hall, Cofounder and Head of Customer Development, Tally Street</i> <ul style="list-style-type: none"> Define and understand customer and revenue retention measurements such as customer acquisition cost, customer lifetime value, net revenue retention and advanced customer segmentation. Discover tools and methods to apply to your business and consider ways to share customer analytics results across your company. Discuss impacts to business if managed well versus managed poorly.
11:50 a.m. - 12:30 p.m.	Lunch	
12:30 - 1:20 p.m.	5. Federal Tax Update: Navigating COVID Legislation TX <ul style="list-style-type: none"> Review recent Federal tax law changes and how they will impact taxpayers and businesses. Walk through significant regulatory developments and guidance concerning COVID legislation and business deductions. Identify the top 3 risks and strategies associated with managing tax liabilities. 	6. Fraud Detection and Prevention MS <i>Anthony LaNasa, CPA, CFE, Managing Principal, HW & Co. CPAs & Advisors</i> <i>Mike Shoffner, Senior Manager & Chief Compliance & Security Office, HW & Co. CPAs & Advisors</i> <ul style="list-style-type: none"> Determine the new threat landscape and how it is evolving in this digital world. Understand trends in what organizations are doing to protect themselves from fraudsters, including how they employ various anti-fraud technologies and what controls have the greatest impact. Consider how this affects you and your organization.
1:20 - 1:30 p.m.	Break	
1:30 - 2:20 p.m.	7. Accounting & Auditing Standard Update: What you need to know AC <ul style="list-style-type: none"> Review the current status of recently issued FASB and auditing standards and guidance. Discuss the impact of revenue recognition, going concern, presentation and disclosure, and other financial statement reporting concerns in a COVID-19 environment. Look at ongoing FASB and AICPA projects, potential timing and expected impact. 	8. Forecasting and Maintaining Adequate Cash Flow and Working Capital FI <i>Jim Lindell, CPA, CSP, CGMA, President, Thorsten Consulting</i> <ul style="list-style-type: none"> Identify strategies, models and resources to examine and benchmark cash and determine the quality of working capital. Discuss how a cash and working capital forecast should be utilized within your organization and how best to communicate needs. Recognize how traditional reporting fails to communicate working capital.
2:20 - 2:30 p.m.	Break	
2:30 - 3:20 p.m.	7. Accounting & Auditing Standard Update: What you need to know <i>(continued)</i>	8. Forecasting and Maintaining Adequate Cash Flow and Working Capital <i>(continued)</i>
3:20 - 3:30 pm	Break	
3:30 - 4:20 p.m.	9. Personal Financial Planning in the Age of COVID SK <i>Janice Cackowski, CFP, Partner, Financial Advisor, Centry Financial Advisors</i> <i>Erin Eurenus, Esq., CPA, Owner, Erin C. Eurenus Attorney at Law</i> <ul style="list-style-type: none"> Identify how COVID has affected financial planning projections, insurance planning, estate planning, and how you, the CPA, can identify the need for financial or estate planning for your clients. Review how a family's financial planning can be impacted when medical issues arise and how clients can prepare for a possible medical crisis. Discuss unique considerations associated with financial planning in different life stages. 	