2020 **Cleveland** Virtual ACCOUNTING Show

INSPIRE | INNOVATE | IGNITE

October 21–22, 2020

ohiocpa.com/Cleveland

THE OHIO SOCIETY OF CPAs
ADVANCING THE STATE OF BUSINESS

INSPIRE | INNOVATE | IGNITE

The Cleveland Accounting Show is not just a two-day event. This core conference is packed with topics and learning you need to enhance your personal and professional successes in 2020.

We appreciate your continued support and have designed the Cleveland Virtual Accounting Show so that you can have a true show experience. Here's what you can expect:

- **Attend any session of your choice!** You create your own agenda in advance or decide what to attend as the day progresses. You can also switch from one session to another within the first ten minutes of the program.
- Connect with vendors through our virtual exhibit hall.
- Engage with speakers during the session through chat and Q&A features.
- Earn prizes and participate in giveaways.
- Hang-out with your peers and have fun!

We appreciate the opportunity to be a partner in your professional success. 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!

🔥 Hot Topics!

CORPORATE

Session 6: Strategic Planning and Positioning

Session 12: Opportunity Zones and 1031 Exchanges: Unlocking the Opportunity

Session 37: Traction: Get a Grip on Your Business To Generate Faster Results

PUBLIC ACCOUNTING

Session 11: Replacing the Annual Performance Appraisal Ritual: After Action Review

Session 27: Auditing in a Remote Environment

Session 42: Transforming the Digital Office

Key Updates

Session 1: A Culture of Inclusion: Promoting Workplace Diversity and Belonging

Session 16: Economic Update

Session 24: The Next Wave of Cyber Attacks

Session 44: Individual Tax Planning Strategies

Register today at

ohiocpa.com/Cleveland

NETWORKING & BUSINESS
Development Opportunities

We understand the importance of networking and business development opportunities. Here's what you can expect in our new virtual format.

Networking after Day 1
Join us post-show on October 21 for a networking happy hour. Grab your beverage of choice and join your peers and the show's thought leaders for discussion on pressing challenges or work-from-home tips.

30 Day Access to the Virtual Exhibit Hall
The Exhibit Hall has undergone a transformation. Walk the virtual hall at your leisure from the comfort of your home. That's right – you will have access to the Virtual Exhibit Hall for 30 days after the event. Discover how you can enhance your own business and stay ahead of the curve in this evolving and competitive business environment.

Raffles and Swag
Keep your eye on our social media channels, join us for the Networking Happy Hour and tune-in on October 21–22 for your chance to take home some prizes.

Post-Show Virtual Goodie Bag
Who doesn't love surprises? We've got treats heading straight to your inbox thanks to our sponsors Duffy & Duffy.

THANK YOU to our Event Supporters

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Engineering-based Cost Segregation Studies

APS .NET ACCOUNTING PRACTICE SALES
THE GLOBAL LEADER IN PRACTICE SALES

SESSION & SPEAKER Spotlight

Session 39: Emerging Technologies Implications on the Auditing Profession

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 32: Project Profitability to Achieve Maximum ROI

Reginald Lee, PhD, professor, Williams College of Business, Xavier University

Over the past 20+ years professor and author, Reginald Lee, has developed, implemented, and used analytics tools that were designed to model cash flow more effectively than cost accounting tools and create unprecedented alignment between operations and finance/accounting. He has also served as an executive consultant in the areas of supply chain, cost management, corporate alignment, and operational analytics for a number of major national and global companies.

Session 32: Accelerate Into Client Advisory Services

Session 42: Transforming to a Digital Office

Amanda Wilkie, PMP, Consultant, Boomer Consulting Inc.

Amanda Wilkie, Consultant at Boomer Consulting, Inc., has a computer science background, but she's not your average geek. With two decades of technology experience, Amanda has spent 13 years driving change and process improvement through innovative technology solutions working across firms of varying sizes in the public accounting profession. She has held strategic leadership positions in firms ranging from Top 50 to Top 10 including her most recent role as CIO of a Top 30 firm. Amanda is a recognized expert in the profession who regularly speaks and writes on blockchain and cryptocurrency and their impact on the profession.

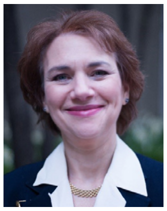
Session 6: Strategic Planning

Session 11: After Action Reviews

Session 20: Value Pricing in Your Firm

Ronald Baker, CPA, founder, VeraSage Institute

Ron started his CPA career in 1984 with KPMG's Private Business Advisory Services in San Francisco. Today, he is the founder of the VeraSage Institute, the leading think tank dedicated to educating professionals around the world. He has been an instructor with the California CPA Education Foundation since 1995 and has authored fifteen courses for them. He has been appointed to the American Institute of Certified Public Accountant's Group of One Hundred, a think tank of leaders to address the future of the profession, named on Accounting Today's 2001, 2002, 2003, 2004, 2005, 2006, 2007, and 2011 Top 100 Most Influential People in the profession, and received the 2003 Award for Instructor Excellence from the California CPA Education Foundation.



Session 13: Update on Compilation and Review Engagements

Session 18: Auditing Standards Update

Ahava Goldman, CPA, CGMA, associate director, audit and attest standards, AICPA

Ahava Goldman is an associate director with the Association of International Certified Professional Accountants Audit and Attest Standards team. Ahava is the staff liaison for the AICPA Auditing Standards Board and supports their standard-setting activities. She is also serving as a Technical Advisor on the International Audit and Assurance Standards Board (IAASB). Previously, Ms. Goldman was a senior manager on the AICPA Examinations Team where she was responsible for the content and development of all sections of the Uniform CPA Examination. Before joining the AICPA, she worked in public accounting at both local and national firms. She graduated magna cum laude from Stern College of Yeshiva University with a Bachelor of Science in Accounting.

Session 36: Traction: Get a Grip on Your Business to Generate Faster Results

Crystal Faulkner, CPA, CExP, MAFF, partner MCM CPAs & Advisors

Crystal is dedicated to promoting local businesses, community leaders, and nonprofit organizations via her role as a co-host for BusinessWise Radio. She is a weekly columnist for Cincinnati.com as well as The Cincinnati Enquirer. She is certified in Business Exit and Transition Planning, and her primary areas of expertise include business and tax advisory, strategic planning, income and estate tax minimization, fraud and forensic analysis, succession planning, wealth enhancement and transfer, and consulting related to business acquisition and disposition.

SESSION 1:
A Culture of Inclusion: Promoting Workplace Diversity and Belonging

Margaret D. Finley

Margaret is the diversity and inclusion strategist for The Ohio Society of CPAs. Ms. Finley brings to her role more than ten years of experience collaborating with clients to help them understand their diversity and inclusion (D+I) business needs and implement strategies to advance their D+I journey. Her background in learning and development, organizational development, and human capital development enables her to establish strong value-added partnerships with clients. Her work primarily focuses on talent optimization strategies that include diversity, inclusion, engagement, and performance management training and consulting.

Crossing Bridges Series

Advancing Diversity and Inclusion

Join OSCPA's Diversity + Inclusion Strategist, Margaret D. Finley, as she engages fellow thought leaders in the D+I realm in learning designed to make your workplace more inclusive for all.

September 14	Recognizing and Neutralizing Bias - WEBCAST
October 12	Inclusive and Non-Inclusive HR Practices AND Inclusive Collaboration & Team Building – ON-DEMAND programs
November 17	Socializing Inclusiveness Throughout Your Organization - WEBCAST
December 8	Sustaining an Inclusiveness Culture During Growth & Succession - WEBCAST
February 10	Stories of Belonging: Equity & Inclusion in the Workplace – WEBCAST
March 10	Inclusiveness Metrics & Measures: Where Are We Going? - WEBCAST

Learn more at:

ohiocpa.com/crossingbridges

Diversity + Inclusion

OCTOBER 21 | Schedule at a glance

AC Accounting RE Regulatory Ethics

7:45-8:00 am

Conference Kickoff
Welcome message from OSCPA and information to help you navigate your day in this virtual learning platform.

	Ethics & Governance	Professional and Organizational Strategy

8:00-9:15 am

1. A Culture of Inclusion: Promoting Workplace Diversity and Belonging PD
Margaret Finley, Diversity & Inclusion Strategist & Consultant, The Ohio Society of CPAs
- Identify and hone the behaviors and competencies associated with an inclusive culture.
- Deepen your understanding of an inclusive culture.
- Strengthen your own cultural competencies to increase team engagement and performance.

9:15-9:30 pm Conference break

9:30-10:45 am

Ethics & Governance

5. Ohio CPA Professional Standards and Responsibilities RE
Tiffany Crosby, CPA, MBA, CTP, CGMA, Director of Learning, The Ohio Society of CPAs
- Explore 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.

Professional and Organizational Strategy

6. Strategic Planning and Positioning MS
Ronald Baker, CPA, Founder, VeraSage Institute
- Discuss the four keys to an effective positioning strategy: business case, intellectual capital, client/customer portfolio and core competencies.
- Engage in the most important questions for any organization.
- Understand how positioning involves tradeoffs.

10:45-11:00 pm Conference break

11:00 am-12:15 pm

10. Return on Energy: Secret Ingredient for Greater ROI PD
Rhonda Peterson, Executive Coach & Workshop Facilitator, Rhonda Peterson
- Understand the APPLLE Framework components: assess assets, prioritize, plan, launch, lean in and evaluate; and how to apply in your role and organization.
- Discuss outcomes from this framework such as clear vision, team alignment, efficient operations, optimum customer experience and new ideas.
- Engage in an interactive assessment and peer discussions to help apply and implement the concepts.

12:15-1:15 pm Lunch | Virtual exhibit hall

1:15-2:45 pm

14. Hacked: A History on Data Privacy, Security and Compliance MS
Jacob Nix, CPA, CISA, President, RISC Point Advisory Group
- Discover how cybersecurity and data privacy are two separate, yet related concepts.
- Explore how data breaches have contributed to the acceleration of privacy law and actions to take to adhere to the new laws.
- Discuss resources available to educate the general public and how government is responding globally and locally.

15. Business Development Workshop PD
Craig Hohnberger, Co-Founder/CVO, Buji ActionCoach

During this interactive workshop including coaching, practice and role playing, you will learn;
- The DICE method to connect with people at networking events, meetings, on the phone and in casual interactions.
- How to gauge the needs and immediate challenges facing potential clients and when to move from a prospect to an actual sales opportunity.
- Transition from a sales mindset to an invite mindset to dramatically improve effectiveness as a way to differentiate from the pack.

2:45-3:00 pm Conference break

3:00-4:30 pm

19. Using Data Analytics to Detect Fraud AC AU
Adam Pajakowski, Senior Manager, Crowe LLP
- Explore the uses of data analytics tools and software to detect fraud.
- Distinguish between the different types of data that can be analyzed, both structured and unstructured.
- Pinpoint red flags of fraud that can appear in the data via trends, patterns, anomalies and exceptions.

4:30-5:30 pm Virtual networking event | Virtual speaker meet and greet | Virtual exhibit hall

AU Auditing | TX Taxes | MS Management Services | BM Business Management & Organization | HR Personnel/Human Resources | PD Personal Development | EC Economics | 🔥 Hot Topic

	Trends to Watch	Tax Strategy	A&A Compliance
8:00-9:15 am	**2. Accounting Standards and Developments Update: Public Company** AC • Highlight recently issued or effective accounting standards. • Discuss major developments in the profession with an emphasis on lessons learned during implementation of significant standards. • Identify what you can do now to prepare for future updates, activities and requirements.	**3. Ohio Sales/ Use Tax: Recent Trends, Developments and Planning Opportunities** TX *Steven Dimengo, CPA, J.D., MT, Partner, Buckingham, Doolittle & Burroughs, LLC* • Review recent developments in Ohio sales/use tax, including how to maximize exemptions and planning opportunities. • Participate in an in-depth discussion of recent Supreme Court and BTA cases interpreting the resale exemption and scope of taxable employment services, which can provide taxpayers with significant tax savings. • Address Department of Taxation audit initiatives and best practices to navigate a sales / use tax audit.	**4. Accounting Standards and Developments Update: Private Company** AC *Julie Peters, CPA, Director, Technical Accounting Consultant, RSM US LLP* *Kristin McLaughlin, CPA, Partner, Technical Accounting Consulting, RSM US LLP* • Highlight recently issued or effective accounting standards. • Discuss major developments in the profession with an emphasis on lessons learned during implementation of significant standards. • Identify what you can do now to prepare for future updates, activities and requirements.
9:15-9:30 pm	Conference break		
9:30-10:45 am	**7. Integrated Reporting: The New Big Picture** AC *Mary Adams, Founder and Chief Catalyst, Smarter-Companies* *Marcy Twete, Founder and CEO, Marcy Twete Consulting* • 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.	**8. Legislative Update:** TX *Gregory M. Saul, Esq., CAE, Director of Tax Policy, Government Relations* *Barbara Benton, CAE, Vice President, Government Relations* • Gain insights into timely state and federal legislative issues. • Unpack regulatory reforms at the Ohio Department of Taxation and Accountancy Board of Ohio. • Review state and federal judicial decisions impacting tax developments.	**9. The Lease Accounting Standard: A Guide to Implementation** AC *John Krizansky, CPA, Principal, HW&Co* • Analyze the standards impact on balance sheet, income statement and cash flow statements. • Walk through application of the new standard using detailed examples. • Discuss best practices from public entity implementation and tips to tackle now to ensure compliance.
10:45-11:00 pm	Conference break		
11:00 am-12:15 pm	**11. Replacing the Annual Performance Appraisal Ritual: After-Action Review** MS HR 🔥 *Ronald Baker, CPA, Founder, VeraSage Institute* • Evaluate annual performance review programs and identify shortcomings. • Explore how after-action reviews capture "sticky," tactical knowledge and can transform cultures. • Walk through questions to ask during an AAR, an example agenda and how to best implement this process.	**12. Opportunity Zones and 1031 Exchanges: Unlocking the Opportunity** TX 🔥 *Greg Smith, Esq., Vice President, Investment Property Exchange Services, Inc.* • Highlight some of the most important factors a potential investor should consider when weighing options. • Compare the benefits and drawbacks of the opportunity zone program and the long-standing Section 1031 exchange in deferring or avoiding capital gains tax. • Discuss ways to couple with other tax strategies like cost segregation to further enhance cash flows.	**13. Update on Compilation and Review Engagements** AU *Ahava Goldman, CPA, CGMA, Associate Director, Audit and Attest Standards, AICPA* • Probe the latest developments and issues relevant to compilation and review engagement, 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	**16. Economic Update** EC 🔥 *James Saling, CIMA, CPWA, President and Principal, Saling Simms Associates* • Highlight new trends in the economy that will impact the state of Ohio. • Understand how recent updates in the economy will affect the profession. • Learn and discuss current news in the economy today.	**17. Retirement Strategies: A Guide to Medicare and Medicaid** TX *Erin Eurenius, CPA, Esq., Attorney, West Side Elder Law* • Identify the differences between Medicaid and Medicare. • Define the rules of Medicaid and the asset and income requirements. • Understand how to leverage asset protection to ensure Medicaid recipients receive proper care.	**18. Auditing Standards Update** AU *Ahava Goldman, CPA, CGMA, Associate Director, Audit and Attest Standards, AICPA* • Assess the effect of recently issued auditing standards and guidance as well as challenges in auditing accounting methods for recently effective FASBs. • 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.
2:45-3:00 pm	Conference break		
3:00-4:30 pm	**20. Pricing on Purpose: Implementing Value Pricing in Your Firm** BM *Ronald Baker, CPA, Founder, VeraSage Institute* • Dive into behavioral economics, marketing strategy and customer psychology, and how these principles should be applied to pricing. • Pinpoint concepts of how consumers are influenced in order to be better equipped to price successfully and increase your profitability. • Understand the business model behind value pricing versus hourly billing.	**21. Business Tax Implications: Rebounding from COVID-19** TX 🔥 *Luke Lucas, CPA, Senior Manager, Rea & Associates, Inc.* *Melissa Dunkle, Senior Manager, Rea & Associates, Inc.* • Evaluate the effects of the CARES Act, including accounting for tax credits related to retaining employees, qualified wages, business closures and decline in gross receipts. • Review business relief provisions that were expanded in the areas of employer payroll taxes, net operating losses and interest expense limitation. • Dissect the broader implications of business decisions and reassess 2020 tax planning based on the impact of this disruption on operations.	**22. Governmental Accounting and Auditing Update** AC AU *Melisa Galasso, CPA, CGMA, Owner, Galasso Learning Solutions LLC* • Understand the latest on governmental accounting and auditing, including how to analyze recent GASB, OMB and Yellow Book requirements. • Discuss major developments, including new technical bulletins, common citations and internal control comments. • Identify what you can do now to prepare for future updates, activities and requirements.
4:30-5:30 pm	Virtual networking event | Virtual speaker meet and greet | Virtual exhibit hall		

OCTOBER 22 | Schedule at a glance

SK Specialized Knowledge · HR Personnel/Human Resources · BM Business Management & Organization

Time	Financial Planning and Analysis	Business Management
7:45-8:00 am	**Conference Kickoff** Welcome message from OSCPA and information to help you navigate your day in this virtual learning platform.	
8:00-9:15 am	**23. Evolution of Accounting & Finance: Accelerate Your Performance** BM *Chris Ortega, MBA, Sr. Finance Manager, Emarsys* • Evaluate artificial intelligence and machine learning solutions existing in accounting and finance. • Assess how AI and ML will impact people, process and performance strategies, including team and organizational readiness. • Gain a deep understanding and application of real-life use cases on how AI and ML tools drive bottom-line results.	**24. The Next Wave of Cyber Attacks** IT 🔥 *Michael Moran, President, Affiliated Resource Group* • Understand what the new threat landscape looks like and how it is evolving. • Consider how this affects you and your organization. • Learn what you need to do to address the threats and mitigate the risks today and into the future.
9:15-9:30 pm	Conference break	
9:30-10:45 am	**28. Managing Organizational Change and Project Flow** BM *Ilona Daw-Krizman, CPA, CITP, CGMA, PMP, President, Krizman and Associates, LLC* • Explore a structured approach to organizational change and project management that will help identify and minimize issues and risks assocaited with implementations. • Uncover the typical phases of reactions when change is occurring in the workplace and the proper tone at the top. • Pinpoint activities and tools to support organizational change and project management processes, including assessing the success of the implementation.	**29. Blind Spots Holding Your Business Back from Excellence** PD *Jared Lockwood, Associate, Sandler Training- Roger Wentworth Grp* • Identify common blind spots and understand how they can adversely affect you or any leader within your organization, regardless of your industry or the size of your company. • Explore how to approach blind spots, so your company can move beyond its comfort zone to adjust to changing market conditions and technologies. • Learn stimulating business insights that enable you and your company to enhance the value and expertise you are bringing to the market.
10:45-11:00 pm	Conference break	
11:00 am-12:15 pm	**33. Project Profitability to Achieve Maximum ROI** MS *Reginald Lee, PhD, Professor, Williams College of Business, Xavier University* • Analyze the project selection process, including value proposition and quantifying the benefits. • Discuss tools to support project selection such as, identifying processes as identity, priority, mandated and background. • Breakdown three steps to improve project ROI: strategic alignment, documenting benefit and managing benefit realization through metrics, measuring and projections.	
12:15-1:15 pm	Lunch | Virtual exhibit hall	
1:15-2:45 pm	**36. Elevating Finance to Trusted Advisor and Value-Adding Business Partner** FI *Chris Ortega, MBA, Sr. Finance Manager, Emarsys* • Understand what stakeholders are looking for in a value-adding buisiness partner. • Identify ways to remove barriers and instill collaboration and a value-add mindset within your finance team and throughout the organization. • Assess how leaders enable innovation within their teams and how to position the finance team to go above and beyond in partnering and influencing decision making.	**37. Traction: Get a Grip on Your Business to Generate Faster Results** BM 🔥 *Crystal Faulkner, CPA, MAFF, CExP, Partner, MCM CPAs & Advisors* • Learn the secrets of strengthening the Six Key Components of your business. • Discover simple yet powerful ways to run your company that will give you and your leadership team more focus, growth and enjoyment. • Walk through tools to help your team better understand their role and be better equipped to help your company succeed.
2:45-3:00 pm	Conference break	
3:00-4:30 pm	**41. Essentials of Personal Financial Planning** SK *Perry Jeffries III, CRPC, CPFA, PES, President, Diamond Equity Advisors* • Learn components of a holistic financial plan and how the current environment is affecting strategies. • Gain insight into how to choose the right investments for your financial plan, including risk management and maximizing retirement income. • Identify different tactics to cash flow budgeting and how to pay off debt systematically.	**42. Transforming to a Digital Office** IT 🔥 *Amanda Wilkie, PMP, Consultant, Boomer Consulting, Inc.* • Get an in-depth look at how leaders are approaching digital transformation, including an investment in technologies, people and processes. • Explore critical initiatives that support a digital enterprise, such as, cloud, cybersecurity, governance, employee training and customer experience. • Examine priorities, challenges and strategies supporting digital transformation.

TX Taxes | AU Auditing | FI Finance | PD Personal Development | IT Information Technology | MS Management Services | AC Accounting | 🔥 Hot Topic

Tracks: Not-for-Profit | Tax Compliance | A&A Risk Management

8:00-9:15 am

Not-for-Profit

25. Not-for-Profit Industry Outlook: Navigating Through the Uncertainty BM

- Dive into the top trends in the nonprofit industry from mergers and strategic partnerships to technology and changes in charitable giving in a COVID-19 world.
- Brainstorm how best to navigate these changes and how to improve employee, donor and board member engagement in this process.
- Discuss the importance of sustainability not starvation and how to evolve with changes in demands and resources.

Tax Compliance

26. Best Practices to Successfully Implementing Technology Tools and Solutions in Corporate Tax Departments TX

Mark Silvaggio, CPA, J.D., Director, PricewaterhouseCoopers LLP
Thomas Fagan, J.D., Director, PricewaterhouseCoopers LLP

- Get an overview of evolution and adoption of automation, including the stages of automation and criteria for scoping.
- Review automation tools in the areas of extract, transform, load (ETL) tools, data analytics and visualization and robotic process automation (RPA).
- Walk through best practices when identifying technology, establishing goals, determining potential value and buy-in, and developing a detailed automation plan.

A&A Risk Management

27. Auditing in a Remote Environment AU 🔥

Bob Dohrer, CPA, CGMA, Chief Auditor, AICPA

- Review what the audit standards say about remote auditing.
- Learn best practices to address higher risk audit and accounting areas, especially as they relate to fraud interviews, internal control and risk assessment, and documentation.
- Brainstorm effective ways to run a remote audit.

9:15-9:30 pm

Conference break

9:30-10:45 am

Not-for-Profit

30. Best Practices in Financial Reporting, Presentation and Disclosures AC

- Walk through financial reporting framework best practices and developments for NFP organizations.
- Illustrate the most important, immediate and challenging disclosures that follow the latest FASB accounting standards and how COVID-19 plays an impact.
- Highlight key trends in financial reporting such as, illustrative reports and increase visibility in telling your story.

Tax Compliance

31. Federal and State Tax Developments TX

Richard Fry, J.D., MT, Partner, Buckingham, Doolittle & Burroughs, LLC

- Unpack new regulations and guidance that have been issued at the federal and state levels.
- Refine your knowledge of the tax law changes and identify additional planning opportunities.
- Emphasize implementation and compliance challenges and opportunities discovered during the 2019/2020 filing season.

A&A Risk Management

32. Accelerate Into Client Advisory Services AU

Amanda Wilkie, PMP, Consultant, Boomer Consulting, Inc.

- Gain insight into key planning considerations (goals, services and technology) that will help you and your firm develop a successful client advisory practice.
- Discuss tips for achieving and sustaining scale, including successful client onboarding, workflow design and performing impactful client assessments.
- Identify key competencies and ways to develop staff with the skills they need to deliver high-quality services to clients.

10:45-11:00 pm

Conference break

11:00 am-12:15 pm

Not-for-Profit

34. Not-for-Profit Leadership: Inspire, Engage and Develop PD

- Understand the skills and competencies an organization needs to guide its talent strategy, from hiring decisions to leadership development to effectively assess success in a given role.
- Dive into leadership frameworks, competency models and key attributes required to succeed in your role.
- Discuss how to embody the values and beliefs of the organization and align with the values of the people you lead during times of uncertainty and distress.

Tax Compliance / A&A Risk Management

35. Cryptocurrency and Digital Assets: Considerations for Accounting Professionals TX AC

Dennis Murphy, CPA, Director, Marcum LLP
Nicholas Ward, CBP, Supervisor, Marcum LLP

- Overview of the blockchain history including cryptocurrency vs. digital assets.
- Dive into current use cases and future expectations for digital assets.
- Walk through the latest regulatory updates and what accounting professionals should know, for example, GAAP valuation and tax compliance.

1:15-2:45 pm

Not-for-Profit

38. Ethical Dilemmas Facing Not-for-Profits BM

- Breakdown the importance of being able to continuously earn the public's trust through commitment to ethical principles, transparency, and accountability.
- Review best practices for conflict of interest, financial transparency and governance policies.
- Discuss top ethical dilemmas facing the NFP industry.

Tax Compliance

39. Social Security Update: Planning for Today and Tomorrow TX

Brandon Smith, Public Affairs Specialist, Social Security Administration

- 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.

A&A Risk Management

40. Emerging Technologies Implications on the Auditing Profession AU

Sean Smith, Assistant Professor, Lehman College

- Articulate and explain trends underway in the artificial intelligence space and blockchain landscape from a technical and implementation perspective.
- Understand and explain how ethics can, and should, be integrated into the emerging technology conversation alongside accounting-specific control developments.
- Examine and critically analyze how trends in technology and regulations will shape the attest and accounting service lines moving forward.

2:45-3:00 pm

Conference break

3:00-4:30 pm

Not-for-Profit

43. Data Analytics for Not-for-Profits: What You Need to Know & Why IT

- Highlight the benefits of a data-driven culture and how data analytics can help your mission grow.
- Walk through key processes to being strategic with your data; how you collect, store, share and involve into the day-to-day practice of your organization.
- Share analytical tools that can support sharper insights in an increasing data-transparent environment.

Tax Compliance

44. Individual Tax Planning Strategies TX 🔥

Scott Eichar, CPA, CFP, Senior Manager, Tax & Business Advisory Services, GBQ Partners, LLC
Jennifer Zimmerman, CPA, Senior Manager, Tax & Advisory Services, GBQ Partners, LLC

- Assess the impact of evolving tax regulations and guidance, including CARES Act and SECURE Act on individuals.
- Highlight individual tax and financial planning opportunities to consider year-round when it comes to investments and credits.
- Evaluate top planning strategies and tips for taking action before year end.

A&A Risk Management

45. How to Identify, Explain and Present Pertinent Financial Information: KPI Dashboards FI

- Learn how to identify key financial metrics, determine the drivers that impact the metrics, and present the metrics and drivers to non-accountants in understandable patterns.
- Review applications that connect multiple data sources and provide visibility by presenting information in a timely and actionable format.
- Focus on how to communicate insights, not just data.

EVENT Details

Date: October 21–22, 2020
Time: 7:45 am – 4:30 pm
Credits: up to 16 credits in multiple areas

OSCPA is excited to welcome you to our brand-new virtual conference platform. We're bringing the same great thought leaders to the virtual stage. Join us online to ask your questions and forge new and meaningful connections! We've amped up the virtual experience, so commute to your living room, connect to WiFi and earn the CPE you need to satisfy your professional standards.

Please contact Member Services at **614.764.2727** should you need any assistance.

2020 Not-for-Profit Track

at the Cleveland Virtual Accounting Show

Bringing the pieces of your mission together...
with actionable insights from NFP thought leaders.

Get strategies to advance your mission

Sharpen your skill set and improve your understanding in the following areas:

Industry Outlook – top trends in demands and resources

Financial Reporting – framework and disclosure opportunities and challenges

Talent Strategy – leadership blueprints, competency models and key attributes to success

Ethics and Accountability – best practices for conflict of interest, financial transparency and governance policies

Data Driven Culture – strategies for operationalizing data analytics to fuel growth

2020 Cleveland Virtual ACCOUNTING Show

Both days	October 21–22, 2020
☐ ~~Non-member **$624**~~	☐ ~~Member **$469**~~
☐ Early non-member **$574**	☐ Early member **$419**

Register by September 24 to save $50.

Single day	
☐ ~~Non-member **$494**~~	☐ ~~Member **$339**~~
☐ Early non-member **$444**	☐ Early member **$289**

Register by September 24 to save $50.

Register today at

ohiocpa.com/Cleveland

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Register by September 24 and save
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2020 **Cleveland Virtual Accounting Show**