

Schedule at a glance

AC Accounting

AU Auditing

MS Management Services

RE Regulatory Ethics

TX Taxes

EC Economics

7:30 - 8:00 am	Registration		
8:00 - 9:30 am	General Session		
	1. Economics Update – Growth and Longevity in a Pandemic Environment EC <i>Jim Saling, CIMA, CPWA, AIF, president, Saling Simms Associates, Inc.</i> <ul style="list-style-type: none">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.		
9:30 - 9:40 am	Break		
9:40 - 10:55 am	Accounting & Finance	Hot Topics	Tax Compliance & Operations
	2. Remote Auditing AU <i>Carl Mayes, CPA, associate director, CPA quality & evolution, AICPA</i> <ul style="list-style-type: none">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.	3. Ohio Professional Standards and Responsibilities RE <ul style="list-style-type: none">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.	4. Cares Act / PPP Update: Business Tax Implications TX <ul style="list-style-type: none">Understand the current requirements of the CARES Act and PPP loan forgiveness process.Obtain tools to assist with documentation and calculation.Review real case studies demonstrating decisions to be made.Discuss the 2020 tax implications of the CARES Act and PPP Loan Forgiveness as it currently stands.
10:55 - 11:05 am	Break		Break
11:05 am - 12:20 pm	5. Budgeting and Forecasting in Uncertain Times <i>Steve Player, CPA, owner, The Player Group</i> <ul style="list-style-type: none">Discuss how to shift budgeting and forecasting toward outcome orientation.Explore agile budgeting and forecasting techniques.Learn key steps to building confidence in the next budgeting process.		6. Ohio State and Local Tax Developments TX <i>Timothy Adams, State and Local Shareholder, Schneider Downs</i> <ul style="list-style-type: none">Highlight some of the most critical state and local tax developments finance and accounting leaders should be aware of as 2020 draws to a close.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, such as cost segregation, to further enhance cash flows.
12:20 - 1:05 pm	Lunch		
1:05 - 2:35 pm	7. Accounting Standard Update AC <ul style="list-style-type: none">Highlight recently issued or effective accounting standards.Discuss major developments important to 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.	8. The New Shape of Work: Thriving in a Remote Work Environment MS <ul style="list-style-type: none">Explore how to create a successful work environment.Discuss how to navigate the security, privacy, and legal aspects of remote working.Learn strategies for driving organizational culture and team productivity.	9. Individual Tax Strategies TX <i>Scott Eichar, CPA, CFP, tax senior manager, GBQ Partners</i> <i>Jennifer Zimmerman, GBQ Partners LLC, Senior Manager Tax & Business Advisory Services</i> <ul style="list-style-type: none">Assess the impact of evolving tax regulations and guidance on tax planning strategies.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.
2:35 - 2:45 pm	Break		
2:45 - 4:00 pm	10. Business Continuity and Scenario Modeling AU <i>Steve Player, CPA, owner, The Player Group</i> <ul style="list-style-type: none">Explore key considerations for developing environment-responsive business continuity plans.Discuss how to incorporate scenario modeling into the strategic planning process.Evaluate how scenario planning can be used as both a risk mitigation tool and for competitive advantage.	11. Engagement Economics MS <i>Reginald Lee, PhD, professor, Williams College of Business, Xavier University</i> <ul style="list-style-type: none">Consider the economics of projects, separating the accounting impact from the cash and operations impact to improve decision-making in a cash-flow sensitive environment.Review a financial framework that incorporates project costing, resource consumption, calculating profit & cash profit, and pricing.Learn how to better manage project economics.	12. Legislative Update TX <i>Gregory M. Saul, Esq., CAE, director, tax policy, OSCPA</i> <ul style="list-style-type: none">Dissect the tax obligations of trusts and estates and how these obligations affect beneficiaries.Review developments related to the Tax Cuts and Jobs Act.Discuss how to anticipate opportunities and develop long-term strategies.

2020 Fall CPE Virtual Conference



Details

Date: December 10, 2020
Time: 8:00 am – 4:30 pm

Registration

Full Name

Society ID/Email*

Business Name

Business Address

City

State Zip Fax

Phone After Hours Phone

Registration Options

<input type="checkbox"/> Regular \$494	<input type="checkbox"/> Member \$389
*Save \$50 when you register before November 12 at the early member discount rate!	
<input type="checkbox"/> Early discount \$444*	<input type="checkbox"/> Early member discount \$339*

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