

DAY 1 | Schedule at a glance

Accounting Regulatory Ethics

Information Technology Auditing Taxes Management Services Personnel/Human Resources Personal Development Computer Software & Applications

	Ethics & Talent MGMT / Essential Skills & Prof. Dev.	Technology Strategy & Productivity
8:25-9:20 a.m.	1. Thrive In 2025 PD <i>Dustin Dale, B.B.A., SHRM</i> Keynote Speaker and Founder, Beyond the Horizon Consulting	
9:20-9:30 a.m.	Conference break	
9:30-10:45 a.m.	2. Ohio Professional Standards and Responsibilities RE <i>Tiffany Crosby, MBA, CTP, CGMA, CPA</i> Chief Learning Officer, The Ohio Society of CPAs Laura Hay, CPA, CAE Executive Vice President, The Ohio Society of CPAs	3. Are Cybersecurity and Compliance a Waste of Time (and Money)? CA <i>Mike Moran</i> Affiliated
10:45-11:00 a.m.	Conference break	
11:00 a.m.-12:15 p.m.	2. Cont.	6. The Evolution of CPA Careers in the Age of Digital and AI Transformation PD <i>Karina Kasztelnick, Ph.D., MBA, BS, CPA, CTP, Post Doc</i> Assistant Professor of Accounting & Data Analytics, Tennessee State University
12:15-1:00 p.m.	Lunch	
1:00-2:15 p.m.	9. Increasing Morale and Workforce Longevity PD <i>Andrea Applegate</i> President, Applegate Talent Strategies, LLC	10. Copilot - New Uses and Strategies PD
2:15-2:25 p.m.	Conference break	
2:25-3:15 p.m.	13. Become and Ethical Leader to Drive Crucial Business PD	14. Best Practices For Implementing Crypto Payments and AI PD
3:15-3:30 p.m.	Conference break	
3:30-4:45 p.m.	17. Ethically Leveraging Generative AI PD IT	

Tax Strategy	Accounting & Auditing Compliance
1. Cont.	
4. Federal Tax - What's Coming In 2025 TX	5. Accounting Standard Update AC <i>John Krizansky, CPA</i> HW&Co.
7. Maximizing Tax Breaks for Small Businesses TX	8. Update on Standards for Reviews, Compilations, and Financial Statement Preparation Engagements AU <i>Mike Glynn, CPA, CGMA</i> AICPA
11. An IRS Update TX <i>Nichelle Gray</i> Senior Tax Specialist & Stakeholder Liaison, IRS	12. From Standards to Strategies: Practical Approaches for Achieving Accounting and Auditing Compliance Excellence AU <i>Jon Shoop, Office Managing Partner</i> Marcum
15. Elder Planning TX <i>Erin Eurenus</i> Westside Elder	16. Governmental and Not-for-Profit A&A Update AU
18. Social Security: Retirement Update TX <i>Theresa Busher</i> Public Affairs Specialist, Social Security Administration Kelly Draggoo Public Affairs Specialist, Social Security Administration	19. Update on Standards for Audit and Attestation Engagements AU <i>Ahava Goldman, CPA, Associate Director</i> AICPA

DAY 2 | Schedule at a glance

Accounting

Economics

Personnel/Human Resources

Finance

Specialized Knowledge

Information Technology

Auditing

Taxes

Management Services

Business Management & Organization

	Financial Accounting, Reporting & Analysis	Business Management & Strategy	Risk Management & Fraud
8:25-9:20 a.m.	20. The Future of Automation in Accounting <i>Lindsay Stevenson, CPA, CGMA</i> <i>Chief Transformation Officer, BPM</i>		
9:20-9:30 a.m.	Conference break		
9:30-10:45 a.m.	21. Educating Clients on Financial Data Interpretation <i>Sam Mansour</i> <i>Stauffer & Associates PLLC</i>	22. Financial Components of a Law Enforcement Investigation <i>Melissa Rodriguez, CFE, CLEI, CM, CCFI</i> <i>Senior Forensic Auditor, U.S. Department of Justice</i>	
10:45-11:00 a.m.	Conference break		
11:00 a.m.-12:15 p.m.	25. Exit Planning - The Strategy Going Forward <i>Mike Trabert, CPA, CVA, CMAP, CEPA, CMAA, CBEC, Partner</i> <i>Marcum</i>	26. Fraud Risk in the Age of AI: Challenges and Opportunities	
12:15-1:00 p.m.	Lunch		
1:00-2:15 p.m.	29. Economic and Development Update <i>Ian Wyatt, Director of Economics and Commercial Market Strategist</i> <i>Huntington National Bank</i>	30. AI, Fraud and Automation - What You Need to Know	
2:15-2:25 p.m.	Conference break		
2:25-3:15 p.m.	33. An Update on Beneficial Ownership Interest	34. Succession Planning As Fraud Prevention <i>Tammy Lohr</i> <i>Moss Adams</i> <i>Chelsea Ritchie</i> <i>Moss Adams</i>	
3:15-3:30 p.m.	Conference break		
3:30-4:45 p.m.	37. Data Analytics – Data Collection, Integration and Storage for Analytics	38. Collusion in Fraud: Detection Approaches	

Tax Compliance	Accounting & Auditing Risk Management
20. Cont.	
23. OSCP Legislative Update <i>Barbara Benton, CAE</i> <i>Vice President, Government Relations,</i> <i>The Ohio Society of CPAs</i> Gregory Saul, Esq., CAE <i>Director of Tax Policy, The Ohio Society of CPAs</i>	24. An Update on Financial Reporting
27. Individual Tax Strategy Update	28. Cyber Fraud
31. Inside the Cost Segregation Power Play <i>Craig Miller, CPA, CCSP, CGFM, MBA</i> <i>President, Duffy & Duffy – Cost Segregation Experts</i>	32. Mastering COSO and Sharing the Power of Internal Control
35. Ohio Sales Tax: 3 Lessons Your Treadmill Can Teach You to Negotiate with Auditors Steve Dimengo, B.A., M.A., CPA, J.D. <i>Managing Partner, Buckingham, Doolittle & Burroughs, LLC</i>	36. Digital Assets: Where We Are and Where We Are Going
39. Cannabis Industry Update <i>Justin Breidenbach, CPA</i>	40. Reimagining Risk Assessment - Center for Plain English Accounting Training <i>Tom Groskopf</i> <i>Barnes Dennig</i> Matt Rosen <i>Barnes Dennig</i>