

# 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.	<b>1. Learn To Discover Your Future</b> <span>PD</span> <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.	<b>2. Ohio Professional Standards and Responsibilities</b> <span>RE</span> <i>Tiffany Crosby, MBA, CTP, CGMA, CPA</i> Chief Learning Officer, The Ohio Society of CPAs <i>Laura Hay, CPA, CAE</i> Executive Vice President, The Ohio Society of CPAs	<b>3. Essential Steps in Cyber Security</b> <span>CA</span> <i>Mike Moran</i> Affiliated
10:45-11:00 a.m.	Conference break	
11:00 a.m.-12:15 p.m.	<b>2. Cont.</b>	<b>6. Next Steps in Automation for Accounting</b> <span>PD</span> <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.	<b>9. Increasing Morale and Workforce Longevity</b> <span>PD</span> <i>Andrea Applegate</i> President, Applegate Talent Strategies, LLC	<b>10. I Can See It Now - Data Visualization</b> <span>PD</span>
2:15-2:25 p.m.	Conference break	
2:25-3:15 p.m.	<b>13. Creating Professional Growth Opportunities</b> <span>PD</span>	<b>14. Technology Session</b> <span>PD</span>
3:15-3:30 p.m.	Conference break	
3:30-4:45 p.m.	<b>17. Ethically Leveraging Generative AI</b> <span>PD IT</span>	

Tax Strategy	Accounting & Auditing Compliance
<b>1. Cont.</b>	
<b>4. Federal Tax Crystal Ball</b> <span>TX</span>	<b>5. Accounting Standard Update</b> <span>AC</span> <i>John Krizansky, CPA</i> HW&Co.
<b>7. Maximizing Tax Breaks for Small Businesses</b> <span>TX</span>	<b>8. Update on Standards for Audit and Attestation Engagements</b> <span>AU</span> <i>Mike Glynn, CPA, CGMA</i> AICPA
<b>11. An IRS Update</b> <span>TX</span> <i>Nichelle Gray</i> Senior Tax Specialist & Stakeholder Liaison, IRS	<b>12. From Standards to Strategies: Practical Approaches for Achieving Accounting and Auditing Compliance Excellence</b> <span>AU</span> <i>Jon Shoop, Office Managing Partner</i> Marcum
<b>15. Elder Planning</b> <span>TX</span> <i>Erin Eurenus</i> Westside Elder	<b>16. Governmental and Not-for-Profit A&amp;A Update</b> <span>AU</span>
<b>18. Social Security: Retirement Update</b> <span>TX</span> <i>Theresa Busher</i> Public Affairs Specialist, Social Security Administration <i>Kelly Draggoo</i> Public Affairs Specialist, Social Security Administration	<b>19. Update on Standards for Audit and Attestation Engagements</b> <span>AU</span> <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.	<b>20. The Future of The Profession</b> <span>SK</span> <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.	<b>21. Educating Clients on Financial Data Interpretation</b> <span>FI</span> <i>Sam Mansour</i> <i>Stauffer &amp; Associates PLLC</i>	<b>22. Financial Components of a Law Enforcement Investigation</b> <span>IT</span> <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.	<b>25. Mergers and Acquisitions - The Strategy Going Forward</b> <span>EC</span> <i>Mike Trabert, CPA, CVA, CMAP, CEPA, CMAA, CBEC, Partner</i> <i>Marcum</i>	<b>26. Strengthening Financial Integrity through Advanced Risk Management and Fraud Prevention</b> <span>SK</span>	
12:15-1:00 p.m.	Lunch		
1:00-2:15 p.m.	<b>29. Economic and Development Update</b> <span>BM</span> <i>Ian Wyatt, Director of Economics and Commercial Market Strategist</i> <i>Huntington National Bank</i>	<b>30. The Blind Spots in Every Accounting Department</b> <span>MS IT</span>	
2:15-2:25 p.m.	Conference break		
2:25-3:15 p.m.	<b>33. Interpreting Financial Statements</b> <span>AC FI</span>	<b>34. Succession Planning As Fraud Prevention</b> <span>MS HR</span> <i>Tammy Lohr</i> <i>Moss Adams</i> <b>Chelsea Ritchie</b> <i>Moss Adams</i>	
3:15-3:30 p.m.	Conference break		
3:30-4:45 p.m.	<b>37. Emerging Trends in Financial Reporting</b> <span>FI IT</span>	<b>38. Money Laundering and Embezzlement</b> <span>MS AU</span>	

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