

2017

ILLINOIS CPA SOCIETY



Your Company Needs a Superhero.  
**Are you ready?**

# Controllers Conference

March 23, 2017 | Rosemont, IL

**EARLY BIRD DISCOUNT!**

Register by March 2, 2017  
and **SAVE**



ILLINOIS CPA SOCIETY  
[www.icpas.org](http://www.icpas.org)



The Illinois CPA Society's

Center for  
Corporate Financial Leadership

# Controllers Conference

## Transform Your Accounting and Finance Skills Into Superpowers!

Become the champion your organization needs through in-depth sessions with proven strategies for addressing your organization's biggest pain points: cybersecurity, team building, cloud accounting and more!

The 2017 Controllers Conference includes fun, interactive keynote sessions to equip you with the power to break through barriers and become a successful team leader. You will also select from two distinctive learning tracks designed to ensure you stay flying high above the rest:

**Master Class Track** contains in-depth sessions providing proven strategies to help solve your biggest pain points

**Leadership Lab Track** offers engaging sessions which provide you with the tools needed to become the leader everyone wants to work for

Select all sessions within a single track or mix and match to create a customized plan sure to help you save the day.

## agenda at-a-glance

7:30 <sup>AM</sup> - 8:15 <sup>AM</sup>	<b>REGISTRATION &amp; NETWORKING BREAKFAST</b>	
8:15 <sup>AM</sup> - 8:30 <sup>AM</sup>	<b>WELCOME REMARKS &amp; ADMINISTRATIVE DETAILS</b>	
8:30 <sup>AM</sup> - 9:45 <sup>AM</sup>	<b>OPENING KEYNOTE</b> Build Your Future Workforce Today	
9:45 <sup>AM</sup> - 10:00 <sup>AM</sup>	<b>NETWORKING BREAK</b>	
10:00 <sup>AM</sup> - 11:15 <sup>AM</sup>	<b>CONCURRENT SESSION I</b>	
	<b>MASTER CLASS:</b> Think Different! New Strategies for Accessing Capital	<b>LEADERSHIP LAB:</b> CFO, Controller, or Both: How to Wear Multiple Hats and Deliver Exceptional Value
11:20 <sup>AM</sup> - 12:35 <sup>PM</sup>	<b>CONCURRENT SESSION II</b>	
	<b>MASTER CLASS:</b> Cyber Security—An Interactive Session That Will Blow Your Mind	<b>LEADERSHIP LAB:</b> Building Teams: The Skill Set Your CEO Needs You to Have
12:35 <sup>PM</sup> - 1:30 <sup>PM</sup>	<b>NETWORKING LUNCHEON:</b> Washington Update—Where We Stand With Tax Reform and Regulatory Changes	
1:30 <sup>PM</sup> - 2:45 <sup>PM</sup>	<b>CONCURRENT SESSION III</b>	
	<b>MASTER CLASS:</b> Cloud Accounting 2.0—The Business Case for Throwing Legacy Systems Out the Window	<b>LEADERSHIP LAB:</b> Leading Up, Down and Around: How to Use 360-Degree Management to be a Better Leader
2:45 <sup>PM</sup> - 3:00 <sup>PM</sup>	<b>NETWORKING BREAK</b>	
3:00 <sup>PM</sup> - 3:50 <sup>PM</sup>	<b>CONCURRENT SESSION IV</b>	
	<b>MASTER CLASS:</b> Managing the Business to Make the Leap to CFO	<b>LEADERSHIP LAB:</b> Finding Your Inner Extrovert
3:55 <sup>PM</sup> - 4:45 <sup>PM</sup>	<b>KEYNOTE:</b> Enhance Your Leadership Presence: An Outside the Box Keynote Session for Controllers	

## Optional Deep Dive Half-Day Workshop

March 22, 2017 | 1:00PM - 4:30PM | 4 CPE | FOS: 2 Communications, 2 Finance

# How to Present Pertinent Financial Data to the Non-financial Audience

**SPEAKER:** Jon Lokhorst, CPA, Leadership Coach and Consultant, Lokhorst Consulting LLC, Lake Geneva, WI

Many non-accountants are unable to read financial reports and leverage them to enhance performance. Gain ideas and techniques that will enable you to help non-accounting staff, clients, and other constituents better understand their organizations and make more informed decisions. Bring data from your own organization and leave with a jumpstart on making a greater impact with your next financial presentation, allowing you to gain confidence and increase your credibility within your enterprise.

### KEY TAKEAWAYS:

- Identify and report key metrics that drive financial performance by integrating financial and non-financial data for better financial storytelling
- Leverage technology for greater impact on visual learners
- Three questions to ask before every presentation

## Top Reasons to Attend:

- 1** Supercharge your finance and accounting skills with the leadership insights you need to get ahead.
- 2** Thwart enemies with solutions to your cybersecurity and cloud accounting challenges.
- 3** Forge bravely forward into the unknown with an optional deep dive workshop on presenting financials to a non-finance audience.

details

Full-Day Program

### Controllers Conference

March 23, 2017

Donald E. Stephens Convention Center  
5555 N. River Road, Rosemont, IL

8:15AM - 4:45PM | 8.5 CPE Hours

**Course Code:** C24729

**Cost:** \$355 M / \$440 NM

**EARLY BIRD DISCOUNT!**

Register by March 2, 2017  
and **SAVE \$25.**

Optional Deep Dive Half-Day Workshop

### How to Present Pertinent Financial Data to the Non-financial Audience

March 22, 2017

Illinois CPA Society, 550 W. Jackson Blvd.,  
Suite 900,  
Chicago, IL

1:00PM - 4:30PM | 4 CPE Hours

**Course Code:** C24730

**Cost:** \$180 M / \$230 NM

register

### Online:

Visit us 24/7 at the Illinois CPA Society website:

[www.icpas.org](http://www.icpas.org)

### Phone:

Call us 8:00AM - 5:00PM, Monday - Friday:

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### 100% Satisfaction Guarantee

We strive to deliver the highest quality educational experience. If you are not satisfied, call us at 800.993.0407, option 4 and we will make it right.



Program materials will be placed on our website to allow attendees to download or print in advance. Attendees will receive an email with a link to access these materials prior to the conference date.

All program information is subject to change. Please verify upon registration.

# 2017 | Controllers Conference

7:30<sup>AM</sup> - 8:15<sup>AM</sup> | REGISTRATION & CONTINENTAL BREAKFAST

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8:15<sup>AM</sup> - 8:30<sup>AM</sup> | WELCOME & OVERVIEW OF THE DAY

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8:30<sup>AM</sup> - 9:45<sup>AM</sup> | OPENING KEYNOTE SESSION

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## Build Your Future Workforce Today

FOS: 1.5 Business Management & Organization

### MODERATOR:

**Ralph Gaillard, CLD**, Chief Learning Director, ICPAS, Chicago, IL

### PANELIST:

**Connie L. Lindsey**, Executive Vice President and Head of Corporate Social Responsibility and Global Diversity & Inclusion, Northern Trust, Chicago, IL

A recent Forbes-KPMG survey found that 80 percent of CEOs believe nothing is more important than talent management, yet many think their finance leaders could improve their team management skills. The talent management strategies from two years ago no longer apply; so, what does managing talent mean today? Answer this question and more in a provocative, one-on-one Keynote Fireside Chat.

### KEY TAKEAWAYS:

- Gain new strategies all leaders must get a handle on today in order to build a workplace that will thrive in the future
- What CFOs and Controllers need to do to close the skills gap

9:45<sup>AM</sup> - 10:00<sup>AM</sup> | NETWORKING BREAK

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10:00<sup>AM</sup> - 11:15<sup>AM</sup> | CONCURRENT SESSION I

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### MASTER CLASS

## A. Think Different! New Strategies for Accessing Capital

FOS: 1.5 Management Advisory Services

### MODERATOR:

**Ralph Gaillard, CLD**, Chief Learning Director, ICPAS, Chicago, IL

### PANELIST:

**Frank Cesario**, CFO, Nanophase, Romeoville, IL

Access to capital for small and mid-sized businesses can be a difficult road to navigate. Discover the types of capital available as you learn alternative funding strategies. In this session, you'll receive new, fresh perspectives for taking advantage of opportunities that match your business needs.

### KEY TAKEAWAYS:

- Learn alternative funding vehicles that go beyond the traditional methods
- Identify funding and financing strategies that make sense for your business

### LEADERSHIP LAB

## B. CFO, Controller, or Both: How to Wear Multiple Hats and Deliver Exceptional Value

FOS: 1.5 Personal Development

### SPEAKER:

**Jon Lokhorst, CPA**, Leadership Coach and Consultant, Lokhorst Consulting LLC, Lake Geneva, WI

Explore the unique challenges CFOs and Controllers face. Differentiate the two roles in terms of focus, duties, mindset, and skillset. Discover ways you can successfully navigate those challenges while providing exceptional value to your company.

## KEY TAKEAWAYS:

- Develop critical relationships and strategic alliances, internally and externally
- Establish your personal brand and unique value proposition as CFO/Controller

11:20AM - 12:35PM | CONCURRENT SESSION II

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## MASTER CLASS

### A. Cyber Security—An Interactive Session That Will Blow Your Mind

FOS: 1.5 Computer Science

#### SPEAKER:

**Nick Espinosa**, CIO & Chief Security Fanatic, BSSi2 LLC, South Barrington, IL

Observe a live hacking demonstration which will provide a firsthand view into how hackers can expose data. Become better informed on minimizing risks to privacy, data, and business operations in our connected digital world.

#### KEY TAKEAWAYS:

- Immediate lessons for securing your organization's IT infrastructure
- Common methods hackers use to compromise data

## LEADERSHIP LAB

### B. Building Teams: The Skill Set Your CEO Needs You to Have

FOS: 1.5 Personal Development

#### SPEAKER:

**improve it!**, Award-winning improvisation team, Chicago, IL

CEOs value leaders who know how to develop and manage effective teams. However, not enough leaders have this skill-set. Use improvisational tactics under the guidance of the improv team **improve it!** to uncover your full potential as a team leader.

#### KEY TAKEAWAYS:

- Create trust while you foster innovation and creativity
- Use the team structure to solve problems

12:35PM - 1:30PM | NETWORKING LUNCHEON

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### Washington Update—Where We Stand With Tax Reform and Regulatory Changes

FOS: 0.5 Taxation

#### SPEAKER:

**John Baker Welch**, Economist/Portfolio Manager, Vice President, William Blair, Chicago, IL

In this fast-paced session, get latest inside intel on the policy issues being debated in Washington, D.C. that will impact corporate finance leaders, including answers to top burning questions.

#### KEY TAKEAWAYS:

- The current state of corporate tax reform and what to expect down the road
  - The evolving regulatory environment in D.C.
  - What these changes will mean for your business
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1:30PM - 2:45PM | CONCURRENT SESSION III

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## MASTER CLASS

### A. Cloud Accounting 2.0 – The Business Case for Throwing Legacy Systems Out the Window

FOS: 1.5 Computer Science

#### SPEAKER:

**Lindy Antonelli, CITP, CPA**, Partner, Armanino LLP, Naperville, IL

Find out why you need to shut down QuickBooks and other legacy on-premise systems in favor of migrating to a cloud accounting technology. Receive a cogent business case for making this transition that allows you to realize and demonstrate value throughout the organization. Bring your questions and participate in an interactive discussion around this hot topic!

#### KEY TAKEAWAYS:

- Why you should rule out options other than cloud
- The proven value of the cloud for finance leaders

## LEADERSHIP LAB

### B. Leading Up, Down and Around: How to Use 360-Degree Management to be a Better Leader

FOS: 1.5 Personal Development

#### SPEAKER:

**Jennifer H. Elder, CPA, CMA, CIA, CFF, CGMA, MS**, President, The Sustainable CFO, Plymouth, NH

The best leaders seize every opportunity and lead in every direction – up, down, and around. This leadership style is defined by thinking strategically and communicating persuasively. Learn to partner with your supervisors, subordinates, and peers by providing insight, direction, and effort to improve the overall effectiveness of the organization.

#### KEY TAKEAWAYS:

- Conduct a personal SWOT analysis to identify your strengths and weaknesses
- Use a 7-step method to quickly assess the strengths, needs, and synergies of your colleagues

2:45PM - 3:00PM | NETWORKING BREAK

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3:00PM - 3:50PM | CONCURRENT SESSION IV

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## MASTER CLASS

### A. Managing the Business to Make the Leap to CFO

FOS: 1 Personal Development

#### MODERATOR:

**Ralph Gaillard, CLD**, Chief Learning Director, ICPAS, Chicago, IL

#### PANELIST:

**Frank Cesario**, CFO, Nanophase, Romeoville, IL

What aspects of the business are CFOs being asked to manage? Answer this question and many more in this candid, give and take conversation with one of the area's top CFOs.

#### KEY TAKEAWAYS:

- Why you need to dive into your organization's business structure and operations
- Economic trends and regulatory issues that CFOs need to watch to run the business
- What keeps CFOs up at night and how to approach solutions for those challenges

## LEADERSHIP LAB

### B. Finding Your Inner Extrovert

FOS: 1 Communications

#### SPEAKER:

**Jennifer H. Elder, CPA, CMA, CIA, CFF, CGMA, MS**, President, The Sustainable CFO, Plymouth, NH

Ever wonder why doing a great job isn't enough to advance your career? Extroverts tend to excel in the workplace due to their ability to communicate powerfully, motivate others, and forge relationships, increasing their odds of securing promotions and professional success. Introverts can take back the edge by learning the extrovert's secrets of communication.

#### KEY TAKEAWAYS:

- 10 tricks of active listening
- 15 tips for powerful communication

3:55PM - 4:45PM | CLOSING KEYNOTE SESSION

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### Enhance Your Leadership Presence: An Outside the Box Keynote Session for Controllers

FOS: 1 Personal Development

#### SPEAKERS:

**Ken Carlson, PCC**, Executive Coach and Leadership Trainer, Authentic Development, Chicago, IL

**Maureen Glass, CPCC**, Executive Coach and Leadership Development Consultant, Maureen Glass Consulting LLC, Westmont, IL

Today's disruptive business environment demands that Controllers transform their leadership style. That requires thinking quickly on their feet, processing information quickly and adapting effectively in the face of ambiguity. Understand how an effective leadership presence can help you project a sense of calm, confidence and decisiveness.

#### KEY TAKEAWAYS:

- Define your leadership presence by identifying the personality characteristics that strengthen and weaken it
- Effectively manage your inner dialogue to increase leadership effectiveness
- Apply the Sphere of Influence and Control tool to reduce anxiety and increase energy and focus



**2017**

Illinois CPA Society

March 23, 2017 | Rosemont, IL | 8.5 CPE Credit Hours

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**Are you Ready?**

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