



# ICPAS SUMMIT<sup>TM</sup> 18

The Premier Event for Accounting and Finance Professionals<sup>TM</sup>

FORMERLY  
THE MIDWEST  
ACCOUNTING  
& FINANCE  
SHOWCASE

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#ICPASSUMMIT

Register today at [www.icpas.org/summit](http://www.icpas.org/summit)

Tuesday-Wednesday

**August 28-29, 2018**

Donald E. Stephens Convention Center  
Rosemont, Illinois

# THE SHOW IS CHANGING.

New name. New experience. New level of...

# AWESOME!

Experience THE NEXT LEVEL OF LEARNING  
to help prepare you for the future:

Tax Reform

Artificial Intelligence

Blockchain

Government

Cybersecurity

Accounting & Auditing

Data Analytics

Virtual Reality

Corporate Strategy

#### Tuesday, August 28, 2018

Registration 7:00<sup>AM</sup> - 4:00<sup>PM</sup>  
CPE Sessions 8:00<sup>AM</sup> - 5:55<sup>PM</sup>  
Exhibit Center 9:15<sup>AM</sup> - 4:15<sup>PM</sup>

#### Wednesday, August 29, 2018

Registration 7:00<sup>AM</sup> - 3:00<sup>PM</sup>  
CPE Sessions 8:00<sup>AM</sup> - 4:40<sup>PM</sup>  
Exhibit Center 9:40<sup>AM</sup> - 3:00<sup>PM</sup>

# Experts Break Down Today's Disruptive Trends!

## The Future of the CPA Profession is Now



### Rose Cammarata, CPA, CGMA

Chairperson, Illinois CPA Society and Vice President & Controller, Mattersight Corporation



### Todd Shapiro

President & CEO, Illinois CPA Society

## The 2018 U.S. Economic Outlook



### Ilyce R. Glink

CEO, Best Money Moves and Think Glink Media



### Lindsey Piegza, Ph.D.

Chief Economist, Managing Director, Stifel Investment Services

## 2018 Technology Forecast



### Dana R. "Rick" Richardson, CPA, CITP, CGMA

Managing Partner, Richardson Media & Technologies, LLC



### Howard Tullman

Executive Director of the Ed Kaplan Family Institute for Innovation and Tech Entrepreneurship at IIT, and former CEO of 1871

## Hands-on Adventures in New Tech!

# XERO Theater

- > Featuring five unique sessions that use case studies and interactive exercises to help you map out your organization's journey to the future.
- > Space is limited to the first 200 registrants per session!

xero

Exclusive Premier Sponsor of  
ICPAS SUMMIT18

## Supercharged Connections!

- > 65+ top-tier exhibitors showcasing the products you need most.
- > New Exhibit Center location to enhance your interactions.
- > Passport to Prizes including a chance to win a \$2,000 travel voucher.
- > "Amp it Up" charging station (Sponsored by SALO).
- > Candyland, music and themed food stations.
- > Alumni luncheons featuring Northern Illinois University, Illinois State University and Loyola University Chicago.

# ICPAS SUMMIT 18

# DAY ONE AT-A-GLANCE

Tuesday, August 28, 2018

8:28.18		8:00 AM - 9:15 AM	9:15 AM - 9:45 AM	9:45 AM - 11:25 AM	11:25 AM - 12:20 PM	12:20 PM - 1:35 PM	1:35 PM - 2:15 PM	2:15 PM - 3:55 PM	3:55 PM - 4:15 PM	4:15 PM - 5:55 PM
TRACKS	KEYNOTE	BREAK	SESSIONS	BREAK	KEYNOTE	BREAK	SESSIONS	BREAK	KEYNOTE	
SOUTH BALLROOM	<b>Tax Reform</b>	8:00 AM - 9:15 AM	9:45 AM - 11:25 AM	11:25 AM - 12:20 PM	12:20 PM - 1:35 PM	1:35 PM - 2:15 PM	2:15 PM - 3:55 PM	3:55 PM - 4:15 PM	4:15 PM - 5:55 PM	
	<b>Keynote:</b> The Future of the CPA Profession is Now Rose Cammarata, Todd Shapiro <b>Code: 100</b> <b>ROOM A</b>	<b>BREAK</b>	<b>SESSIONS:</b> State and Local Tax Reform Update <b>Code: 101 CLE: 1.5 CFP: 2</b> <b>ROOM A</b>	<b>BREAK</b>	<b>Keynote:</b> Future Proofing Your Business: Critical Trends and Technologies Howard Tullman <b>Code: 108</b> <b>ROOM A</b>	<b>BREAK</b>	<b>SESSIONS:</b> International Tax Reform Update <b>Code: 109 CLE: 1.5 CFP: 2 EA: 2</b> <b>ROOM A</b>	<b>BREAK</b>	<b>Keynote:</b> 2018 Technology Forecast Dana R. "Plick" Richardson <b>Code: 116</b> <b>ROOM A</b>	
NORTH BALLROOM	<b>XERO Theater*</b> Exclusive Premier Sponsor of ICPAS SUMMIT18	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)								
	<b>Technology</b>	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)								
	<b>Accounting &amp; Auditing</b>	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)								
	<b>Corporate Strategy</b>	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)								
	<b>Healthcare</b>	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)								
	<b>QuickBooks Theater*</b>	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)								
	<b>QuickBooks Theater*:</b> The Future of the CPA Profession is Now Rose Cammarata, Todd Shapiro <b>Code: 100</b> <b>ROOM A</b>	<b>BREAK</b>	<b>SESSIONS:</b> XERO Hour Live <b>Code: 102</b> <b>ROOM B</b>	<b>BREAK</b>	<b>Keynote:</b> Future Proofing Your Business: Critical Trends and Technologies Howard Tullman <b>Code: 108</b> <b>ROOM A</b>	<b>BREAK</b>	<b>SESSIONS:</b> A.I. Adoption Trail: Where Does Your Firm Sit? <b>Code: 110</b> <b>ROOM B</b>	<b>BREAK</b>	<b>Keynote:</b> 2018 Technology Forecast Dana R. "Plick" Richardson <b>Code: 116</b> <b>ROOM A</b>	
	<b>Building a Virtual CPA Firm from the Ground Up</b> <b>Code: 103</b> <b>ROOM C</b>	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)								
	<b>The Best Accounting &amp; Auditing Update</b> <b>Code: 104</b> <b>ROOM D</b>	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)								
	<b>Data Analytics is the New Must-Have Skill</b> <b>Code: 105</b> <b>ROOM E</b>	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)								
	<b>Healthcare - What Do We Do Now?</b> <b>Code: 106</b> <b>ROOM F</b>	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)								
	<b>QuickBooks App Lab 2018</b> <b>Code: 107</b> <b>ROOM G</b>	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)								
	<b>Revenue Recognition - Are you Prepared?</b> <b>Code: 112</b> <b>ROOM D</b>	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)								
	<b>M&amp;As: Trends and Opportunities</b> <b>Code: 113</b> <b>ROOM E</b>	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)								
	<b>3 Must-Have Strategies for Reducing Your Benefit Costs</b> <b>Code: 114 CLE: 1.5 CFP: 2 EA: 2</b> <b>ROOM F</b>	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)								
	<b>QuickBooks App Lab 2018</b> <b>Code: 115</b> <b>ROOM G</b>	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)								

\*XERO Theater and QuickBooks Theater are limited attendance.



= Engage Session

8:29.18		8:00AM - 9:40AM	9:40AM - 10:40AM	10:40AM - 11:30AM	11:30AM - 12:30PM	12:30PM - 2:10PM	2:10PM - 3:00PM	3:00PM - 4:40PM	
TRACKS		SESSIONS	BREAK	KEYNOTE	BREAK	SESSIONS	BREAK	SESSIONS	
SOUTH BALLROOM		<b>Tax Reform</b> Individual Income Tax Reform Update Code: 200 CLE: 1.5 CFP: 2 EA: 2	ROOM A	<b>Keynote:</b> The 2018 U.S. Economic Outlook Ilyse R. Glink Lindsey Piegza Moderator: Patti Caldwell Code: 207 ROOM A		<b>Business Income Tax Reform Update</b> Code: 208 CLE: 1.5 CFP: 2 EA: 2	ROOM A	<b>Not-for-Profit Tax Reform Update</b> Code: 215 CLE: 1.5 CFP: 2 EA: 2	ROOM A
NORTH BALLROOM		<b>XERO Theater*</b> Exclusive Premier Sponsor of ICPAS SUMMIT18 <b>xero</b>	ROOM B	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)		<b>A.I. Mastery: The Technology that Lies Ahead</b> Code: 209	ROOM B	<b>Running a Remote Workforce: Should Shoes Be Optional?</b> Code: 216	ROOM B
		<b>Technology</b> Accelerate Growth with Technology Built for the Real World Code: 202  Wolters Kluwer	ROOM C	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)		<b>Why Progressive Firms Will Rule the Current Market Landscape</b> Code: 210 	ROOM C	<b>The Blockchain Files: The Truth is Revealed!</b> Code: 217	ROOM C
		<b>Government</b> The Best GASB Financial Reporting Update Code: 203	ROOM D	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)		<b>The Big Impact of Small Fraud in Government</b> Code: 211	ROOM D	NO SESSION	ROOM D
		<b>Corporate Strategy</b>  fei financial executives international Chicago Chapter	ROOM E	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)		<b>Innovation Starts with You: Regulatory Compliance Using Emerging Tech</b> Code: 212	ROOM E	<b>401(K) Update</b> Code: 218	ROOM E
		<b>Emerging Professionals</b>  Cetera FINANCIAL SPECIALISTS Member of Cetera	ROOM F	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)		<b>Three Steps to Avoid Becoming the "Lone Wolf" Leader</b> Code: 213	ROOM F	 <b>How to be an Emboldened Ethical Leader and Decisive Communicator</b> Code: 219 Ethics: 2	ROOM F
		<b>QuickBooks Theater*</b>  quickbooks	ROOM G	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)		<b>QuickBooks App Lab 2018</b> Code: 214	ROOM G	NO SESSION	ROOM G

\*XERO Theater and QuickBooks Theater are limited attendance.  = Engage Session

Optional Pre-SUMMIT

# Workshops

Monday

8.27.18

1:00 pm - 4:30 pm | CONCURRENT WORKSHOPS

**Register today! These workshops will sell out quickly.**

Please note: These workshops are optional and require a separate registration.

## Basic Trusts: Taxation of Trusts and Preparing Form 1041

Roll up your sleeves and participate in a hands-on preparation of Form 1041. Plus, hear why trusts are created and understand the tax return filing requirements for trusts and estates. Bonus: Walk away with sample trust language for trust classification you can use in your practice.

**Lee Arbus, CPA, JD, LLM** | Partner, Levun, Goodman & Cohen, LLP  
**Renee Andrews-Tushinski, CPA** | Director, ORBA

## Navigate the Complexities of Global Tax Compliance Reporting

It's the workshop you've been waiting for... Part 1 covers Foreign Tax Credits Basics: Hear recent legislative and regulatory developments around the foreign tax credit. Learn how to apply key foreign tax credit concepts and how to prepare Form 1116/1118. Part 2 preps you for Taxation of US Expatriates Abroad and Third Country Nationals in the US: Learn concepts that assist with tax planning and compliance with US citizens or resident aliens working outside the U.S. and those from other countries who work in the U.S. Know the specific requirements of the §911 Foreign Earned Income Exclusion and Foreign Housing Exclusion, its interaction between Form 2555 and Form 1116 - and more!

**Edward Weaver, CPA, JD, LLM** | International Tax Senior Manager, Grant Thornton LLP  
**Roger J. Yule, CPA, MST, MA** | Tax Manager, Wipfli LLP

## The Small Practitioner: How to Minimize the Risks You Take Every Day

Every day you encounter risks. Your client tells you that they have proof of the expenses reported on their financial statements, but now your client is under IRS exam...will the agent accept your client's oral testimony? What will the agent accept? What about if your client decides to go to Appeals? There's a lot of confusion out there. Learn how you might protect against or avoid the many risks you face on a daily basis.

**Mark S. Heroux, CPA** | Partner, Baker Tilly Virchow Krause, LLP  
**Deborah Rood, CPA, MST** | Risk Control Consulting Director, CNA

# Concurrent Educational Sessions

Tuesday  
8.28.18

8:00 AM - 9:15 AM

KEYNOTE

## The Future of the CPA Profession is Now

Changing demographics, expanding regulations and new technologies are impacting the CPA profession like never before. What will the audit in the future look like? How will tax preparation and planning change? What services will clients and companies look to CPAs to provide? We'll explore that future state, which is happening as we speak.

**Rose Cammarata, CPA, CGMA** | Chairperson, Illinois CPA Society and Vice President & Controller, Mattersight Corporation

**Todd Shapiro** | President & CEO, Illinois CPA Society

9:45 AM - 11:25 AM

## State & Local Tax Reform Update

Besides the federal tax law changes, the state of Illinois has enacted tax changes of its own. Discover the effects of these changes and hear significant state legislative updates and proposals that impact individual and business taxpayers. Focus on the compliance issues facing Illinois business owners and individuals generating revenue outside Illinois.

**Chris Beaulieu, CPA, MST**  
FSB&W LLC

9:45 AM - 11:25 AM

## XERO Theater: XERO Hour Live

Kick off the day with a sneak peek of the XERO Theater sessions – and get ready to look at technology, privacy and staffing in a whole new way. Join the XERO Hour team for a candid discussion on the merits of competitors working together – with results that raise the bar for everyone. You'll weigh in on topics, so make sure to charge your smartphone.

**A. Lottafolks**  
(AKA a panel of experts!)

9:45 AM - 11:25 AM

## Building a Virtual CPA Firm from the Ground Up

The model of a virtual CPA practice is within your reach, and - surprise! - there's a very low barrier to entry. See and touch the tech gadgets you need to fit your virtual office into a backpack, including laptop "play stations." The only lease you'll be signing is the one for your newfound freedom.

**Daniel Moshe**  
CEO, Tech Guru



## Engage Sessions

Online polling, group discussions, case studies, role playing, simulations, and games to enhance your learning experience.

# Concurrent Educational Sessions

9:45 AM - 11:25 AM

## The Best Accounting & Auditing Update

Hear about the key GAAP, Audit, and Compilation and Review Standards that could affect your practice or position. Understand the impact of the Lease Standard and what this means to your balance sheet. Bonus: Changes to financial instruments are coming – learn how to prepare yourself!

**Kurt G. Oestriecher, CPA**  
Partner, Oestriecher & Company, CPAs

9:45 AM - 11:25 AM

## Data Analytics is the New Must-Have Skill

Analyzing data is no longer a nice to have skill; it is a necessary one. Corporate finance leaders are realizing that demonstrating value internally and externally goes through one lane—data analytics. Learn how this new skill set is changing how you do your job and evaluate your business.

**Chris Mosier**  
Senior Manager, Analytics Center of Excellence, Plante Moran

**John Head**  
Vice President, Host Analytics

**Joe Kayser**  
Founder, Koan Analytic Resource, LLC

**Josh Skelly**  
Manager, Risk & Accounting Advisory Services, Plante Moran

9:45 AM - 11:25 AM

## Healthcare – What Do We Do Now?

Illinois state regulations, federal regulations, Presidential Executive Orders, and insurance company business practices create a web of healthcare confusion. Untangle this web by understanding what is changing, why, and how you will be impacted. Plus, uncover the methods to employ to take better control of rising costs and falling quality.

**Marcus B. Newman, RHU**  
Vice President, Benefits Consulting, GCG Financial, an ALERA Group Company

9:45 AM - 11:25 AM

## QuickBooks App Lab 2018

This popular session is back with live demos of QuickBooks' latest and greatest Apps! Plus, see firsthand how to make this technology work for you through increased productivity and profitability.

**The QuickBooks Team**

12:20 PM - 1:35 PM

KEYNOTE

## Future Proofing Your Business: Critical Trends and Technologies

Come prepared for a fast-paced analysis of the emerging trends and the newest technologies which are changing the face and the future of the financial industry and beyond. Receive concrete examples, behavioral changes, and actionable take-aways to immediately apply and incorporate into your operation. Howard's talk will leave you slightly breathless and totally inspired to get out there and get busy helping to invent the future.

**Howard Tullman** | Executive Director of the Ed Kaplan Family Institute for Innovation and Tech Entrepreneurship at IIT, and former CEO of 1871



# Concurrent Educational Sessions

2:15 PM - 3:55 PM

## International Tax Reform Update

Understand how the international provisions of the Tax Cuts and Jobs Act fit into the larger world of international taxation. Discuss planning opportunities related to S Corps versus C Corps and learn about changes to the repatriation tax and application of the territorial participation exemption. Plus, look at new export incentives and key concepts regarding basis erosion rules.

**Thomas Murtagh, CPA, JD, LLM**  
Partner, BKD LLP

2:15 PM - 3:55 PM

## XERO Theater: A.I. Adoption Trail: Where Does Your Firm Sit?

Think you know where your firm is going? Perhaps, it's best to first ask where your clients are going and then consider their needs. It starts with embracing the cloud and building a platform that easily implements new technology as needed – including groundbreaking A.I. tools. Learn where you sit on the A.I. adoption trail and the steps required to stay ahead of the curve.

**Shelly Lingor**  
Director of Technology & Accounting, GunnChamberlain P.L.

**Will Lopez**  
Founder & CEO, Advisorfi

2:15 PM - 3:55 PM

## The Threat in the Toaster

The world is experiencing an Internet-of-Things (IoT) explosion – and with billions of new devices being turned on annually comes billions of new security threats. Learn about these new IoT threats and how to protect your gadgets from the hackers that would love to illegally use your business devices.

**Nick Espinosa**  
Chief Security Fanatic & CIO,  
Forbes Technology Council  
Member, Security Fanatics  
& BSSi2 LLC

2:15 PM - 3:55 PM

## Revenue Recognition – Are You Prepared?

Get trusted advice for addressing the various challenges companies have encountered as they implement the standard. Discover the optimal transition choice for your company, and focus on developing an implementation plan, so it is an efficient process.

**Kurt G. Oestrieher, CPA**  
Partner, Oestrieher & Company, CPAs

2:15 PM - 3:55 PM

## M&As: Trends and Opportunities

In this panel discussion, you'll discover the direction of the M&A market, its opportunities and pitfalls to avoid. Discuss all phases of the transaction from investment banking, private equity, due diligence and the purchasing company side, along with alternative capital options for financing the purchase.

**Speakers TBD**

2:15 PM - 3:55 PM

## 3 Must-Have Strategies for Reducing Your Benefit Costs

Achieving sustainable reductions in benefits costs involves smart tax, financial and plan strategies. Learn to help your clients evaluate and implement these strategies, either as a value-added or as a billable service. Review the relevant regulations and learn how to assess the cost-effectiveness of these strategies for any given client.

**Kent Utsey**  
President, American Health Resources

# Concurrent Educational Sessions

2:15 PM - 3:55 PM

## QuickBooks App Lab 2018

This popular session is back with live demos of QuickBooks' latest and greatest Apps! Plus, see firsthand how to make this technology work for you through increased productivity and profitability.

**The QuickBooks Team**

4:15 PM - 5:55 PM

KEYNOTE

## 2018 Technology Forecast

Rick will provide attendees with his vision of both the short and longer-term future for technology, including technologies important to the accounting professional. Review prior-year predictions, what major-market companies are doing and how their actions will affect all of us, current trends in emerging technologies and Rick's personal forecasts on our technology future. Bonus: Look for Rick to bring some of the latest technologies with him to share with participants.

**Dana R. (Rick) Richardson, CPA, CITP, CGMA** | Managing Partner, Richardson Media & Technologies, LLC

Wednesday  
**8.29.18**

8:00 AM - 9:40 AM

## Individual Income Tax Reform Update

Cut through the commentary on the Tax Cuts and Jobs Act and understand how these new changes will affect individuals and families. Learn planning opportunities and strategies for you to begin discussions with your clients and continue throughout the year, including reduced tax rates, new alimony rules, child tax credit, and deduction of home mortgage interest.

**Mark Mirsky, CPA, MST, CGMA**  
Managing Director, ROI CPE LLC

8:00 AM - 9:40 AM

## XERO Theater: Cybersecurity: A Strength, Not a Threat

Polish your sales pitch with valuable mentions of your cybersecurity and data protection services. Join us for an informative session that outlines and clarifies current industry practices and learn to strike the balance of easy implementation with awareness and safety. Review decision scenarios to help you better understand your current cybersecurity engagement and its influence on you and your clients.

**Adam Lovingood**  
Associate General Counsel, XERO

8:00 AM - 9:40 AM

## Accelerate Growth with Technology Built for the Real World

Technology can help firms of all sizes do more with less - but it must be the right technology. Cut through the complexity by looking at global trends impacting the accounting profession, critical insights to help professionals increase revenue and expand offerings and ways to move toward value creation and away from commoditization with technology built for the real world.

**Brian Siet, CPA**  
Senior Manager, Strategic Relationships, Wolters Kluwer Tax and Accounting North America

# Concurrent Educational Sessions

8:00 AM - 9:40 AM

## The Best GASB Financial Reporting Update

Got GASB pronouncements overload? Gain a clear understanding of each new standard on the horizon and the impact on your organization. Discuss implementation preparation and how to avoid the pitfalls. Hear what's on GASB's radar by looking at ongoing projects and impending changes.

**Michael Malatt, CPA**  
Senior Manager, Baker Tilly  
Virchow Krause, LLP

8:00 AM - 9:40 AM

## Create Your Own Business Development Plan

Learn the secrets of revenue growth that only a few firms have unlocked. Discover the four powerful strategies in personal business development and learn how to craft a powerful business development plan that produces tangible results. Bonus: Walk away with a meaningful sample plan that you can adapt for your firm.

**Art Kuesel**  
President, Kuesel Consulting, Inc.

8:00 AM - 9:40 AM

## QuickBooks App Lab 2018

This popular session is back with live demos of QuickBooks' latest and greatest Apps! Plus, see firsthand how to make this technology work for you through increased productivity and profitability.

**The QuickBooks Team**

8:00 AM - 9:40 AM

## Leading Up: The Superpower Every Finance Professional Needs

Learn the skills needed to build unwavering trust from your boss, how to flip the script in becoming a better leader by inviting upward leadership and many more skills that will help you develop an effective working relationship with your boss and other superiors.

**Jon Lokhorst, CPA, ACC**  
Leadership Coach & Consultant,  
Lokhorst Consulting LLC

10:40 AM - 11:30 AM

KEYNOTE

## The 2018 U.S. Economic Outlook

The recent federal tax changes, possible shifts in U.S. trade policy, and the volatile markets are just some of the issues that will be tackled. Our expert panel will share their perspectives on these economic factors and others, while providing their forecasts for the economy in 2018 and beyond. This session is sure to shape the advice given to your clients as well as your business decisions.

**Panel Moderator: Patti Caldwell** | Managing Member, Caldwell Finance & Management Consulting

**Ilyce R. Glink** | CEO, Best Money Moves and Think Glink Media

**Lindsey Piegza, Ph.D.** | Chief Economist, Managing Director, Stifel Investment Services

# Concurrent Educational Sessions

12:30 PM - 2:10 PM

## Business Income Tax Reform Update

The Tax Cuts and Jobs Act has a broad impact on U.S. businesses and their owners. Understand how these significant changes affect corporations and pass-through entities. Learn planning opportunities and strategies for you to begin discussions with your clients, including reduced tax rates, new Section 199 deduction, repeal of corporate AMT and modification of NOL rules.

**Mark Mirsky, CPA, MST, CGMA**  
Managing Director, ROI CPE LLC

12:30 PM - 2:10 PM

## XERO Theater: A.I. Mastery: The Technology that Lies Ahead

Get a behind-the-scenes look at artificial intelligence for the accounting industry. Learn the three stages of A.I. development and how to predict which parts of your practice are candidates for disruption and how to prepare for the change. Discover the best ways to glean new insights from the ever-growing quantity of data.

**Herman Man**  
VP Product and Partnerships,  
XERO

**Wendy Spies**  
Director of Engineering Strategy  
and Business Development,  
Microsoft

12:30 PM - 2:10 PM

## Why Progressive Firms Will Rule the Current Market Landscape

Discover the secret that will allow CPA firms to thrive in the current and near-future market. Hint: It involves using new and emerging technology to its best advantage and offering forward looking, value-added services that extend beyond the traditional services.

**Corey Greene**  
Product Manager, Tax Workflow,  
Thomson Reuters

12:30 PM - 2:10 PM

## The Big Impact of Small Fraud in Government

Smaller, commonplace fraud schemes don't always make the headlines, but they can have a detrimental effect on government entities. Uncover the most common types of fraud and how they occurred. Learn how to detect existing fraud and gain an understanding of internal controls and other considerations that can mitigate the risks of fraud in the future.

**Michael Malatt, CPA**  
Senior Manager, Baker Tilly  
Virchow Krause, LLP

12:30 PM - 2:10 PM

## Innovation Starts with You: Regulatory Compliance Using Emerging Tech

Discuss Compliance, Rev Rec, Leasing and Inventory Automation through emerging technologies such as Geolocation, the Internet of Things (IoT) and Virtual Reality. Experience the power of tracking and visualizing an asset in real time for compliance while also viewing a warehouse in Virtual Reality with real-time data.

**Frank Cesario**  
CFO, CTI Industries

**CJ Kuehl**  
Vice President, DMI

**David Proctor**  
COO, DMI

12:30 PM - 2:10 PM

## Three Steps to Avoid Becoming a "Lone Wolf" Leader

Anyone can oversee a team, but effectively leading a team means letting go of the idea that you must do it all. Through game simulation, explore and apply the three simple steps to avoiding the "Lone Wolf Mentality." Walk away with an immediate action plan to improve your decision-making process and set you apart as a successful leader that utilizes the talents of the team.

**Ron Rael, CPA, CGMA**  
Leadership Expert & Founder,  
The High Road® Institute

# Concurrent Educational Sessions

12:30 PM - 2:10 PM

## QuickBooks App Lab 2018

This popular session is back with live demos of QuickBooks' latest and greatest Apps! Plus, see firsthand how to make this technology work for you through increased productivity and profitability.

**The QuickBooks Team**

3:00 PM - 4:40 PM

## Not-for-Profit Tax Reform Update

Hear how not-for-profits are impacted by The Tax Cuts and Jobs Act. Look at recent IRS audit issues, new cases and rulings affecting not-for-profits. Plus, analyze audit traps for not-for-profits and practical tips for staying out of tax trouble.

**Paula Cozzi Goedert, JD**  
Partner, Barnes & Thornberg LLP

**Zack Fortsch, CPA, MST**  
Partner, RSM US LLP

3:00 PM - 4:40 PM

## XERO Theater: Running a Remote Workforce: Should Shoes be Optional?

Discover the right way to build a remote workforce. Learn to identify good remote employee candidates, create an environment conducive to remote work and develop a process for managing remote workers. Needless to say, the dynamics differ from traditional physical office spaces. Hear about one firm's true-life adventure – and participate in colorful scenarios to help prepare you for the unexpected.

**Tina Garza**  
Chief Number Cruncher,  
Accountingrose

3:00 PM - 4:40 PM

## The Blockchain Files: The Truth is Revealed!

What is Blockchain? More importantly, why should you care? Take the mystery out of one of the most misunderstood new technologies and receive a common-sense overview of what Blockchain is and how it works. Plus, learn how Blockchain can impact accounting and auditing functions.

**Paul A. Tatro**  
Founder, Blockchain U Online

3:00 PM - 4:40 PM

## 401(k) Update

401(k)s, still the most popular retirement plan, present corporate finance leaders with many challenges from an operations and compliance standpoint. A panel of experts share their proven best practices for addressing these never-ending issues.

**Speakers TBD**

3:00 PM - 4:40 PM

## How to be an Emboldened Ethical Leader and Decisive Communicator

Biases can cloud our vision when it comes to understanding ethical behavior. Through interactive exercises, learn how to overcome bias while developing a self-awareness of your ethics and values. Elevate your ethical leadership style by understanding what actionable steps you can take to become a better communicator and decision-maker.

**Elizabeth Pittelkow Kittner, CPA, CGMA, CITP, DTM**  
Controller, Litera Microsystems





**SIMULCAST OPTION!**  
 Access to the Keynote Sessions and Tax Reform Track Sessions both days from the convenience of your computer, tablet or mobile device.

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<input checked="" type="checkbox"/>	Code:	Date:	Title:	ICPAS M/NM:	Total:
<input type="checkbox"/>	PC1	8/27	Pre-SUMMIT Workshops - select session on next page (Registration for the SUMMIT Session Pass or Exhibit Center is required)	\$190	\$ _____
<input type="checkbox"/>	RB1	8/28-29	2-Day Session Pass & Access to Exhibit Center	\$335/\$360	\$ _____
<input type="checkbox"/>	RD1	8/28	1-Day Session Pass & Access to Exhibit Center (Tuesday)	\$290/\$315	\$ _____
<input type="checkbox"/>	RD2	8/29	1-Day Session Pass & Access to Exhibit Center (Wednesday)	\$290/\$315	\$ _____
<input type="checkbox"/>	SIM	8/28-29	Simulcast Option (Keynotes and Tax Reform Track only)	\$335/\$360	\$ _____
<input type="checkbox"/>	EXH	8/28-29	Exhibit Center Only (\$25 Value)	FREE	\$0

### UNIVERSITY ALUMNI LUNCHEONS

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<input type="checkbox"/>	009	8/28	Northern Illinois University	FREE	\$0
<input type="checkbox"/>	010	8/28	Illinois State University	FREE	\$0
<input type="checkbox"/>	011	8/28	Loyola University Chicago	FREE	\$0
<input type="checkbox"/>	012	8/28	Bradley University	FREE	\$0

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YES, please contact me about auxiliary aids.

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 Last Name: \_\_\_\_\_  
 Company: \_\_\_\_\_  
 Title: \_\_\_\_\_  
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### REGISTER INFORMATION (AVOID THE LINES. PRE-REGISTER TODAY!)

#### Pre-Registration Deadlines:

- **BEFORE August 17, 2018** and your confirmation and admittance badge will be **MAILED** to you.
- **BETWEEN August 18-24, 2018** and you may **PICK UP** your admittance badge at the advance registration center at the SUMMIT.
- **AFTER August 24, 2018** you may **BRING** the completed form to register on-site at the SUMMIT.

A confirmation and badge will be mailed to educational session attendees within 10 days after receiving your registration. Exhibit-only attendees will pick up badges on-site. If you have any changes to your schedule, please call Member Services at 800.993.0407, option 4. No refunds will be given. Substitutions are permitted.

If auxiliary aids are required in order for you to participate in the ICPAS SUMMIT, please notify us on the registration form. We will contact you for more details.

#### WEBSITE

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

#### FAX (Both Pages)

This form with credit card information to: 312.993.9432

#### MAIL (Both Pages)

This form with check or credit card information to  
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#### QUESTIONS

or for more information, call 800.993.0407

# REGISTRATION

## REGISTRATION CONTINUED

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_ Member ID#: \_\_\_\_\_ (if applicable)

**You must select your preferred sessions in order for your registration to be processed.**

**Code: Time: Title: Field of Study: CPE/CLE/CFP/EA:**

### MONDAY, AUGUST 27, 2018

<input type="checkbox"/>	005	1:00 <sup>AM</sup> - 4:30 <sup>PM</sup>	Basic Trusts: Taxation of Trusts and Preparing Form 1041	4 Taxation	4 CPE/3.25 CLE/4 CFP/4 EA
<input type="checkbox"/>	006	1:00 <sup>AM</sup> - 4:30 <sup>PM</sup>	Navigate the Complexities of Global Tax Compliance Reporting	4 Taxation	4 CPE/3.25 CLE/4 CFP/4 EA
<input type="checkbox"/>	007	1:00 <sup>AM</sup> - 4:30 <sup>PM</sup>	The Small Practitioner: How to Minimize the Risks You Take Every Day	3 Taxation, 1 Behavioral Ethics	4 CPE/3.25 CLE/4 CFP/4 EA

### TUESDAY, AUGUST 28, 2018

<input type="checkbox"/>	100	8:00 <sup>AM</sup> - 9:15 <sup>AM</sup>	<b>Keynote: The Future of the CPA Profession is Now</b>	<b>1.5 Accounting</b>	<b>1.5 CPE</b>
<input type="checkbox"/>	101	9:45 <sup>AM</sup> - 11:25 <sup>AM</sup>	State and Local Tax Reform Update	2 Taxation	2 CPE/1.5 CLE/2 CFP
<input type="checkbox"/>	102	9:45 <sup>AM</sup> - 11:25 <sup>AM</sup>	Xero Theater: Xero Hour Live	2 Computer Science	2 CPE
<input type="checkbox"/>	103	9:45 <sup>AM</sup> - 11:25 <sup>AM</sup>	Building a Virtual CPA Firm from the Ground Up	2 Computer Science	2 CPE
<input type="checkbox"/>	104	9:45 <sup>AM</sup> - 11:25 <sup>AM</sup>	The Best Accounting & Auditing Update	1 Accounting, 1 Auditing	2 CPE
<input type="checkbox"/>	105	9:45 <sup>AM</sup> - 11:25 <sup>AM</sup>	Data Analytics is the New Must-Have Skill	2 Computer Science	2 CPE
<input type="checkbox"/>	106	9:45 <sup>AM</sup> - 11:25 <sup>AM</sup>	Healthcare - What Do We Do Now?	2 Specialized Knowledge & Applications	2 CPE
<input type="checkbox"/>	107	9:45 <sup>AM</sup> - 11:25 <sup>AM</sup>	QuickBooks App Lab 2018	2 Computer Science	2 CPE
<input type="checkbox"/>	108	12:20 <sup>PM</sup> - 1:35 <sup>PM</sup>	<b>Keynote: Future Proofing Your Business: Critical Trends and Technologies</b>	<b>1.5 Specialized Knowledge &amp; Applications</b>	<b>1.5 CPE</b>
<input type="checkbox"/>	109	2:15 <sup>PM</sup> - 3:55 <sup>PM</sup>	International Tax Reform Update	2 Taxation	2 CPE/1.5 CLE/2 CFP/2 EA
<input type="checkbox"/>	110	2:15 <sup>PM</sup> - 3:55 <sup>PM</sup>	Xero Theater: A.I. Adoption Trail: Where Does Your Firm Sit?	2 Computer Science	2 CPE
<input type="checkbox"/>	111	2:15 <sup>PM</sup> - 3:55 <sup>PM</sup>	The Threat in the Toaster	2 Computer Science	2 CPE
<input type="checkbox"/>	112	2:15 <sup>PM</sup> - 3:55 <sup>PM</sup>	Revenue Recognition - Are You Prepared?	2 Accounting	2 CPE
<input type="checkbox"/>	113	2:15 <sup>PM</sup> - 3:55 <sup>PM</sup>	M&As: Trends and Opportunities	2 Finance	2 CPE
<input type="checkbox"/>	114	2:15 <sup>PM</sup> - 3:55 <sup>PM</sup>	3 Must-Have Strategies for Reducing Your Benefit Costs	2 Taxation	2 CPE/1.5 CLE/2 CFP/2 EA
<input type="checkbox"/>	115	2:15 <sup>PM</sup> - 3:55 <sup>PM</sup>	QuickBooks App Lab 2018	2 Computer Science	2 CPE
<input type="checkbox"/>	116	4:15 <sup>PM</sup> - 5:55 <sup>PM</sup>	<b>Keynote: Rick Richardson's 2018 Technology Forecast</b>	<b>2 Computer Science</b>	<b>2 CPE</b>

### WEDNESDAY, AUGUST 29, 2018

<input type="checkbox"/>	200	8:00 <sup>AM</sup> - 9:40 <sup>AM</sup>	Individual Income Tax Reform Update	2 Taxation	2 CPE/1.5 CLE/2 CFP/2 EA
<input type="checkbox"/>	201	8:00 <sup>AM</sup> - 9:40 <sup>AM</sup>	Xero Theater: Cybersecurity: A Strength, Not a Threat	2 Computer Science	2 CPE
<input type="checkbox"/>	202	8:00 <sup>AM</sup> - 9:40 <sup>AM</sup>	Accelerate Growth with Technology Built for the Real World	2 Computer Science	2 CPE
<input type="checkbox"/>	203	8:00 <sup>AM</sup> - 9:40 <sup>AM</sup>	The Best GASB Financial Reporting Update	2 Accounting (Government/Yellow Book)	2 CPE
<input type="checkbox"/>	204	8:00 <sup>AM</sup> - 9:40 <sup>AM</sup>	Leading Up: The Superpower Every Finance Professional Needs	2 Personal Development	2 CPE
<input type="checkbox"/>	205	8:00 <sup>AM</sup> - 9:40 <sup>AM</sup>	Create Your Own Business Development Plan	2 Personal Development	2 CPE
<input type="checkbox"/>	206	8:00 <sup>AM</sup> - 9:40 <sup>AM</sup>	QuickBooks App Lab 2018	2 Computer Science	2 CPE
<input type="checkbox"/>	207	10:40 <sup>AM</sup> - 11:30 <sup>AM</sup>	<b>Keynote: The 2018 U.S. Economic Outlook</b>	<b>1 Economics</b>	<b>1 CPE/1 CFP</b>
<input type="checkbox"/>	208	12:30 <sup>PM</sup> - 2:10 <sup>PM</sup>	Business Income Tax Reform Update	2 Taxation	2 CPE/1.5 CLE/2 CFP/2 EA
<input type="checkbox"/>	209	12:30 <sup>PM</sup> - 2:10 <sup>PM</sup>	Xero Theater: A.I. Mastery: The Technology that Lies Ahead	2 Computer Science	2 CPE
<input type="checkbox"/>	210	12:30 <sup>PM</sup> - 2:10 <sup>PM</sup>	Why Progressive Firms Will Rule the Current Market Landscape	2 Business Management/Operations	2 CPE
<input type="checkbox"/>	211	12:30 <sup>PM</sup> - 2:10 <sup>PM</sup>	The Big Impact of Small Fraud in Government	2 Auditing (Government/Yellow Book)	2 CPE
<input type="checkbox"/>	212	12:30 <sup>PM</sup> - 2:10 <sup>PM</sup>	Innovation Starts with You: Regulatory Compliance Using Emerging Tech	2 Computer Science	2 CPE
<input type="checkbox"/>	213	12:30 <sup>PM</sup> - 2:10 <sup>PM</sup>	Three Steps to Avoid Becoming a "Lone Wolf" Leader	2 Personal Development	2 CPE
<input type="checkbox"/>	214	12:30 <sup>PM</sup> - 2:10 <sup>PM</sup>	QuickBooks App Lab 2018	2 Computer Science	2 CPE
<input type="checkbox"/>	215	3:00 <sup>PM</sup> - 4:40 <sup>PM</sup>	Not-for-Profit Tax Reform Update	2 Taxation	2 CPE/1.5 CLE/2 CFP/2 EA
<input type="checkbox"/>	216	3:00 <sup>PM</sup> - 4:40 <sup>PM</sup>	Xero Theater: Running a Remote Workforce: Should Shoes be Optional?	2 Computer Science	2 CPE
<input type="checkbox"/>	217	3:00 <sup>PM</sup> - 4:40 <sup>PM</sup>	The Blockchain Files: The Truth is Revealed!	2 Computer Science	2 CPE
<input type="checkbox"/>	218	3:00 <sup>PM</sup> - 4:40 <sup>PM</sup>	401(k) Update	2 Auditing	2 CPE
<input type="checkbox"/>	219	3:00 <sup>PM</sup> - 4:40 <sup>PM</sup>	How to be an Emboldened Ethical Leader and Decisive Communicator	2 Behavioral Ethics	2 CPE/2 Ethics



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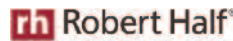
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