



ICPAS SUMMITTM 18

The Premier Event for Accounting and Finance ProfessionalsTM

FORMERLY
THE MIDWEST
ACCOUNTING
& FINANCE
SHOWCASE

It's a CPE and Yellow Book REPORTING YEAR!

An incredible value to get up to 16 CPE hours for only \$335 for members.



ILLINOIS CPA SOCIETY®
www.icpas.org

 #ICPASSUMMIT

Register today at 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^{AM} - 4:00^{PM}
CPE Sessions 8:00^{AM} - 5:55^{PM}
Exhibit Center 9:15^{AM} - 4:15^{PM}

Wednesday, August 29, 2018

Registration 7:00^{AM} - 3:00^{PM}
CPE Sessions 8:00^{AM} - 4:40^{PM}
Exhibit Center 9:40^{AM} - 3:00^{PM}

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.

8.28.18	8:00AM - 9:15AM	9:15AM - 9:45AM	9:45AM - 11:25AM	11:25AM - 12:20PM	12:20PM - 1:35PM	1:35PM - 2:15PM	2:15PM - 3:55PM	3:55PM - 4:15PM	4:15PM - 5:55PM
TRACKS	KEYNOTE	BREAK	SESSIONS	BREAK	KEYNOTE	BREAK	SESSIONS	BREAK	KEYNOTE
Tax Reform			State and Local Tax Reform Update Code: 101 CLE: 1.5 CFP: 2				International Tax Reform Update Code: 109 CLE: 1.5 CFP: 2 EA: 2		
SOUTH BALLROOM			ROOM A				ROOM A		
XERO Theater* Exclusive Premier Sponsor of ICPAS SUMMIT18	The Future of the CPA Profession is Now Rose Cammarata Todd Shapiro Code: 100 ROOM A	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)			Future Proofing Your Business: Critical Trends and Technologies Howard Tullman Code: 108 ROOM A	VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)			2018 Technology Forecast Dana R. "Pick" Richardson Code: 116 ROOM A 
Technology			XERO Hour Live Code: 102 ROOM B				A.I. Adoption Trail: Where Does Your Firm Sit? Code: 110 ROOM B		
			Building a Virtual CPA Firm from the Ground Up Code: 103 ROOM C				The Threat in the Toaster Code: 111 ROOM C		
Accounting & Auditing			The Best Accounting & Auditing Update Code: 104 ROOM D				Revenue Recognition - Are you Prepared? Code: 112 ROOM D		
Corporate Strategy  fei financial executives international change chapter			Data Analytics is the New Must-Have Skill Code: 105 ROOM E				M&As: Trends and Opportunities Code: 113 ROOM E		
Healthcare			Healthcare - What Do We Do Now? Code: 106 ROOM F				3 Must-Have Strategies for Reducing Your Benefit Costs Code: 114 CLE: 1.5 CFP: 2 EA: 2  ROOM F		
QuickBooks Theater* 			QuickBooks App Lab 2018 Code: 107 ROOM G				QuickBooks App Lab 2018 Code: 115 ROOM G		
NORTH BALLROOM									

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		Tax Reform		Individual Income Tax Reform Update Code: 200 CLE: 1.5 CFP: 2 EA: 2		ROOM A		ROOM A		Business Income Tax Reform Update Code: 208 CLE: 1.5 CFP: 2 EA: 2		ROOM A		Not-for-Profit Tax Reform Update Code: 215 CLE: 1.5 CFP: 2 EA: 2	
XERO Theater*		Cybersecurity: A Strength, Not a Threat Code: 201		ROOM B		The 2018 U.S. Economic Outlook Ilyse R. Glink Lindsey Plegza Moderator: Patti Caldwell Code: 207		ROOM A		A.I. Mastery: The Technology that Lies Ahead Code: 209		ROOM B		Running a Remote Workforce: Should Shoes Be Optional? Code: 216	
Technology		Accelerate Growth with Technology Built for the Real World Code: 202		ROOM C		Wolters Kluwer		ROOM C		Why Progressive Firms Will Rule the Current Market Landscape Code: 210		ROOM B		The Blockchain Files: The Truth is Revealed! Code: 217	
Government		The Best GASB Financial Reporting Update Code: 203		ROOM D				ROOM D		The Big Impact of Small Fraud in Government Code: 211		ROOM C		NO SESSION	
Corporate Strategy		Leading Up: The Superpower Every Finance Professional Needs Code: 204		ROOM E				ROOM E		Innovation Starts with You: Regulatory Compliance Using Emerging Tech Code: 212		ROOM D		401(k) Update Code: 218	
Emerging Professionals		Create Your Own Business Development Plan Code: 205		ROOM F				ROOM F		Three Steps to Avoid Becoming the "Lone Wolf" Leader Code: 213		ROOM E		How to be an Emboldened Ethical Leader and Decisive Communicator Code: 219 Ethics: 2	
QuickBooks Theater*		QuickBooks App Lab 2018 Code: 206		ROOM G				ROOM F		QuickBooks App Lab 2018 Code: 214		ROOM F		NO SESSION	
qb inturf quickbooks.															
NORTH BALLROOM															
VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)															
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VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)															
VISIT SUMMIT EXHIBIT CENTER (North Ballroom, 1st Floor)															

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. Oestrieher, CPA
Partner, Oestrieher & 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, LL.M.
Partner, BKD LLP

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

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

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

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

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

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

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

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

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

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,
Accountingprose

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.

REGISTRATION OPTIONS

<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

<input checked="" type="checkbox"/>	Code:	Date:	Title:	ICPAS M/NM:	Total:
<input type="checkbox"/>	007	8/28	Northern Illinois University	FREE	\$0
<input type="checkbox"/>	008	8/28	Illinois State University	FREE	\$0
<input type="checkbox"/>	009	8/28	Loyola University Chicago	FREE	\$0

TOTAL AMOUNT ENCLOSED: \$ _____

PERSONAL INFORMATION AND PAYMENT

☐ YES, please contact me about auxiliary aids.

First Name: _____ MI: _____

Last Name: _____

Company: _____

Title: _____

Address: _____

City: _____ State: _____ Zip: _____ - _____

Phone: _____ Fax: _____

Email: _____

☐ I am interested in becoming a member of the Illinois CPA Society.
Please send me membership information.

Interested in Exhibiting?

Mike Walker

mike@rwwcompany.com | 925.648.3101

Interested in Sponsorship?

Wendy Sech

Director of Business Development
and Education Operations, Illinois CPA Society
312.517.7655 | sechw@icpas.org
www.icpas.org

METHOD OF PAYMENT:

☐ Check (Payable to Illinois CPA Society) ☐ Visa ☐ MasterCard ☐ Discover ☐ Amex

Card Number: _____ Exp. Date: _____

Cardholder Name: _____

Signature: _____

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

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
Illinois CPA Society, Attention Member Services
550 W. Jackson Blvd., Suite 900, Chicago, IL 60661-5742

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	1:00AM - 4:30PM	Basic Trusts: Taxation of Trusts and Preparing Form 1041	4 Taxation	4 CPE/3.25 CLE/4 CFP/4 EA
<input type="checkbox"/>	006	1:00AM - 4:30PM	Navigate the Complexities of Global Tax Compliance Reporting	4 Taxation	4 CPE/3.25 CLE/4 CFP/4 EA
<input type="checkbox"/>	007	1:00AM - 4:30PM	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	8:00AM - 9:15AM	Keynote: The Future of the CPA Profession is Now	1.5 Accounting	1.5 CPE
<input type="checkbox"/>	101	9:45AM - 11:25AM	State and Local Tax Reform Update	2 Taxation	2 CPE/1.5 CLE/2 CFP
<input type="checkbox"/>	102	9:45AM - 11:25AM	Xero Theater: Xero Hour Live	2 Computer Science	2 CPE
<input type="checkbox"/>	103	9:45AM - 11:25AM	Building a Virtual CPA Firm from the Ground Up	2 Computer Science	2 CPE
<input type="checkbox"/>	104	9:45AM - 11:25AM	The Best Accounting & Auditing Update	1 Accounting, 1 Auditing	2 CPE
<input type="checkbox"/>	105	9:45AM - 11:25AM	Data Analytics is the New Must-Have Skill	2 Computer Science	2 CPE
<input type="checkbox"/>	106	9:45AM - 11:25AM	Healthcare - What Do We Do Now?	2 Specialized Knowledge & Applications	2 CPE
<input type="checkbox"/>	107	9:45AM - 11:25AM	QuickBooks App Lab 2018	2 Computer Science	2 CPE
<input type="checkbox"/>	108	12:20PM - 1:35PM	Keynote: Future Proofing Your Business: Critical Trends and Technologies	1.5 Specialized Knowledge & Applications	1.5 CPE
<input type="checkbox"/>	109	2:15PM - 3:55PM	International Tax Reform Update	2 Taxation	2 CPE/1.5 CLE/2 CFP/2 EA
<input type="checkbox"/>	110	2:15PM - 3:55PM	Xero Theater: A.I. Adoption Trail: Where Does Your Firm Sit?	2 Computer Science	2 CPE
<input type="checkbox"/>	111	2:15PM - 3:55PM	The Threat in the Toaster	2 Computer Science	2 CPE
<input type="checkbox"/>	112	2:15PM - 3:55PM	Revenue Recognition - Are You Prepared?	2 Accounting	2 CPE
<input type="checkbox"/>	113	2:15PM - 3:55PM	M&As: Trends and Opportunities	2 Finance	2 CPE
<input type="checkbox"/>	114	2:15PM - 3:55PM	3 Must-Have Strategies for Reducing Your Benefit Costs	2 Taxation	2 CPE/1.5 CLE/2 CFP/2 EA
<input type="checkbox"/>	115	2:15PM - 3:55PM	QuickBooks App Lab 2018	2 Computer Science	2 CPE
<input type="checkbox"/>	116	4:15PM - 5:55PM	Keynote: Rick Richardson's 2018 Technology Forecast	2 Computer Science	2 CPE

WEDNESDAY, AUGUST 29, 2018

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



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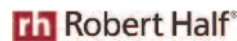
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