

FUTURE FOCUSED

THE SHOW

MIDWEST ACCOUNTING
& FINANCE SHOWCASE

 #TheSHOW

KNOWLEDGE
STRATEGIES
SOLUTIONS
CONNECTIONS

16 CPE
Hours

for only \$325*

*members



ILLINOIS CPA SOCIETY
www.icpas.org

Tuesday-Wednesday

August 29-30, 2017

Donald E. Stephens Convention Center
Rosemont, IL

Register today at
www.icpas.org/show

FUTUREFOCUSED

This year's SHOW will be an unparalleled experience designed to help you face the uncertain future ahead!



The Evolving CPA Profession

Lisa Hartkopf, CPA

Chairperson, Illinois CPA Society



The Evolving CPA Profession

Todd Shapiro

President & CEO, Illinois CPA Society

Gain Insight

from

Nationally
Recognized
Keynotes



Technology Forecast

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

Technology Futurist



The 2017-2018 Economic Outlook

Terry Savage

Nationally Syndicated
Financial Columnist



What the Chicago Cubs Can Teach Us About Creating a Great Place to Work

Simon T. Bailey

International Leadership Guru





100+

EXHIBITORS

Check out state-of-the-art innovations in technology and software solutions.

www.icpas.org/show
(for full list)

Expand your vision of the future

11 targeted education tracks:

- Taxation
- Accounting & Auditing
- Corporate Strategy
- Technology
- Healthcare
- Financial Planning
- Leadership Development
- Talent Management
- Emerging Professionals
- QuickBooks
- CPE Walking Tours

A unique, unforgettable experience

Come for the learning, but stay for the fun!

Alumni Luncheons (Tuesday)

Join fellow alumni from *Northern Illinois University, Illinois State University and Loyola University*

Passport to Prizes

Visit participating exhibitors for your chance to win fabulous prizes including a \$2,000 travel voucher

Social Media School

Career Coaching (private sessions)

Coffee Café

Game Lounge

Candyland (FREE sweets)

Show Details




Tuesday, August 29, 2017

Registration	7:00AM - 4:00PM
CPE Sessions	8:00AM - 5:55PM
Connections Hall	9:15AM - 4:15PM







Wednesday, August 30, 2017

Registration	7:00AM - 3:00PM
CPE Sessions	8:00AM - 5:15PM
Connections Hall	9:40AM - 3:35PM

All keynote presentation and session materials will be available on www.icpas.org approximately one week prior to the SHOW in lieu of printed handouts. Please call us at 800.993.0407, option 4 if you have any questions about accessing SHOW information online.

8:29.17	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
Taxation 	The Evolving CPA Profession Lisa Hartkopf Todd Shapiro Code: 100		State and Local Tax Update Code: 101 CLE: 1.5 CFP: 2		 What the Chicago Cubs Can Teach Us About Creating a Great Place to Work Simon T. Bailey Code: 109		The Future of Estate Planning Code: 110 CLE: 1.5 CFP: 2 EA: 2		Technology Forecast Dana R. "Rick" Richardson Code: 119
			 Design Your Dream Practice Code: 102				Increase Your Profitability with Schedule C Clients Code: 111		

SOUTH BALLROOMS

8:29.17	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
Healthcare 	Technology 		Healthcare for Small Businesses Code: 103				Enforcement of the Affordable Care Act Under the New Administration Code: 112 CLE: 1.5 CFP: 2 EA: 2		Artificial Intelligence Isn't Just Coming - It's Already Here! Are You Ready?  Code: 113
	Accounting & Auditing 		 Anatomy of a Cyberattack: See it Happen and How to Mitigate the Damage Code: 104 peters & associates <small>simply your accountant</small>				Revenue Recognition - Are You Ready? Code: 114		
Corporate Strategy 	Financial Planning 		 Move from Backroom Accountant to Strategic Advisor Using Better Data Code: 106				 Assess Risk in Today's Chaotic/Disruptive?@%! Business Environment (Yes, it Can Be Done) Code: 115		 The Overachiever's Guide to Getting Unstuck Code: 117
	Leadership Development 		 Boost Future Revenue: Position Yourself as a Trusted Business Advisor Code: 108				Irrational Clients - Are They Crazy, or Just Misunderstood? Code: 116 CFP: 2		

NORTH BALLROOMS

8:29.17	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
CPE Walking Tour									

G HALL

 **Technology Walking Tour**
Code: 118

8:30-17		8:00AM - 9:40AM		9:40AM - 10:40AM		10:40AM - 11:30AM		11:30AM - 12:30PM		12:30PM - 2:10PM		2:10PM - 3:35PM		3:35PM - 5:15PM	
TRACKS		SESSIONS		BREAK		KEYNOTE		BREAK		SESSIONS		BREAK		SESSIONS	
SOUTH BALLROOMS	Taxation	Individual Income Tax Reform Code: 200 CLE: 1.5 CFP: 2 EA: 2				The 2017-18 Economic Outlook Terry Savage Code: 206 CFP: 1				Business Income Tax Reform Code: 207 CLE: 1.5 CFP: 2 EA: 2				Not-for-Profit Tax Reform Code: 214 CLE: 1.5 EA: 2	
	QuickBooks* intuit qib QuickBooks,	Manage and Scale Your Firm Code: 201				Robert Half®				QuickBooks App Lab Code: 208					
NORTH BALLROOMS		Emerging Professionals		Big Data and Data Analytics: What You Need to Know Code: 202				VISIT CONNECTIONS HALL (G Hall/Exhibit Floor)		From Hello to Cha-Ching: Converting Contacts into Clients Code: 209				A No-Nonsense Guide to Becoming a CFO or Firm Partner Code: 215	
		Technology		How to Slay Those Nasty, Revenue-Killing Technology Challenges Code: 203		Walters Kluwer				Grow Your Audit Business Today with Tomorrow's Technology Code: 210		THOMSON REUTERS		Got \$15 Million? How to Dodge the High Costs of a Cyberattack Code: 216	
		Talent Management		Hire Smart Now to Avoid the Crazy Expensive Turnover Costs Later Code: 204						Do the Math: Companies with Great Technology = Attracting Top Talent Code: 211		xero		Is Your Current Workplace Culture Causing Your Top Hires to Flee? Code: 217	
		Corporate Strategy fei Financial executives TECHNOSTRAT design strategy		The New Numbers Cruncher is a Robot: What's Next in Finance Automation Code: 205						Keep Your Bottom Line and Top Talent Happy with Great, Cost-Effective Employee Perks Code: 212				Top Ten 401(k) Mistakes Code: 218	
G HALL		CPE Walking Tour								Technology Walking Tour Code: 213					

Monday | 8.28.17

Optional Pre-Conference **WORKSHOPS**

Register today! These workshops sell out quickly.

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

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

Basic Trusts Boot Camp: Taxation of Trusts and Preparing Form 1041*

Learn the ins and outs of trusts by attending this highly interactive workshop where you'll review everything you need-to-know on the rationale for creating trusts. Plus, get line-by-line advice on how to expertly prepare Form 1041.

- ❖ Define basic concepts such as distributable net income and trust accounting income.
- ❖ Examine the tax return filing requirements for trusts and estates.
- ❖ Use sample trust language for classifying trusts and preparing a basic Form 1041.

Presenters:

Karen Fleming, CPA
Manager, BKD, LLP

Paige Goepfert, CPA, MST, CSEP
Senior Manager, RSM US LLP

Zealously Protecting Your Clients from the IRS*

We all know that the IRS can cause several types of headaches for your clients – including outright errors! However, it's harder than ever to know where to go for reliable answers. Not anymore! This highly interactive workshop will (literally) walk you through a game plan to shield your clients from IRS problems.

- ❖ Participate in hands-on drafting of correspondence, including Reasonable Cause Abatement requests, Installment Agreements, and Offers in Compromise.
- ❖ Discover how to preserve your client's Appeal Rights.
- ❖ Learn insider moves to change IRS human errors into positive outcomes for your clients.
- ❖ Discuss how to ethically advise your clients regarding difficult choices in dealing with the IRS.

Presenters:

John Domke, EA, MSIR
Principal, Jacobs Tax & Consulting LLC

Mark S. Heroux, CPA
Partner, Baker Tilly Virchow Krause, LLP

Harriet Jacobs, CPA, MST
Principal, Jacobs Tax & Consulting LLC

Phillip A. Levisky, CPA
Senior Manager, FG MK

Jonathan E. Strouse, JD, CPA
Partner, Harrison & Held, LLP

*Limited Attendance

Tuesday | 8.29.17

8:00 AM - 9:15 AM | KEYNOTE

The Evolving CPA Profession

The accounting profession is in the midst of a technology revolution of epic proportion, and you haven't seen anything yet! Hear directly from the leaders of your Illinois CPA Society on how technology advances, such as automation and artificial intelligence, will impact each and every one of us, and what we need to do now to prepare for this evolution.

Lisa Hartkopf, CPA - Chairperson, Illinois CPA Society and Partner, Ernst & Young LLP

Todd Shapiro - President & CEO, Illinois CPA Society

9:45 AM - 11:25 AM | CONCURRENT SESSIONS

State and Local Tax Update

- ❖ Need-to-know updates on rule changes and court decisions affecting Illinois, Cook County, and Chicago tax laws.
- ❖ Assess and prepare for the impact of state income and sales tax nexus.

David Kupiec, CPA, JD - Managing Partner, Kupiec & Martin, LLC

Natalie Martin, JD - Partner, Kupiec & Martin, LLC

Design Your Dream Practice

- ❖ Using a guided case study, identify what you're really good at and discover creative ways to package those services to add customer value.
- ❖ Discover niche growth areas and how to carve out a unique position for yourself within the marketplace.

Michelle L. Long, CPA, MBA - Owner, Long for Success, LLC

Healthcare for Small Businesses

- ❖ Will it stay or will it go? Gaze into the healthcare "crystal ball" to gauge the future of the ACA "repeal and replace" efforts and what the possible impacts may be.
- ❖ Breakdown healthcare cost trends for small and mid-sized businesses.

Marcus B. Newman, RHU - Senior Vice President, Group Sales, GCG Financial, an ALERA Group Company

Anatomy of a Cyberattack: See it Happen and How to Mitigate the Damage

- ❖ See a Real Hack - How does my network appear to a hacker? How do hackers infiltrate networks?
- ❖ Protect Your Network - What is cyber insurance, and what are the typical coverage issues? What is a security breach incident response plan?
- ❖ Use the Law to Your Advantage - What are the cybersecurity laws and regulations? What are the emerging lawsuit damages for privacy breaches?

Keatron Evans - Managing Partner, KM Cyber Security Solutions

Mike Richmond, JD - Risk Advisor, Horton Group Risk Advisory Solutions

Todd Rowe, JD - Partner, Tressler LLP

Bruce Ward - VP, Business Strategy, Peters and Associates

Educational Sessions



Accounting & Auditing Update

- ❖ The new lease standard WILL impact your balance sheet – understand how!
- ❖ Hear about the recent changes in accounting for financial instruments, including the Current Expected Credit Loss Model.
- ❖ SSARS 22 and 23, the final pieces of the ASRC Clarification Project, are now complete. Discuss what they will mean to you.

Kurt G. Oestricher, CPA - Partner, Oestricher & Company, CPAs

Move from Backroom Accountant to Strategic Advisor Using Better Data

- ❖ Select the relevant financial and operational data that will truly lead to better business decisions.
- ❖ Translate the data into actionable recommendations for your top management and colleagues.

Speaker TBA

Increase Your Practice Value with Business Retirement Services

- ❖ Learn key features of business-sponsored retirement plans and which ones may be most suitable for a particular business.
- ❖ Identify key fiduciary concerns.

Patrick W. McNally, MBA - Regional Planning Specialist – Upper Midwest Region, Cetera Financial Specialists

Boost Future Revenue: Position Yourself as a Trusted Business Advisor

- ❖ Augment and refine your skills to move from an expert to an advisor.
- ❖ Hear surefire questions that'll get your client to expound on issues beyond traditional accounting problems.
- ❖ Learn how to thrive in a new role as your client's general contractor.

Bill Reeb, CPA, CITP, CGMA - CEO, The Succession Institute

12:20 PM - 1:35 PM | KEYNOTE

What the Chicago Cubs Can Teach Us About Creating a Great Place to Work

Former Disney executive and best-selling author Simon Bailey breaks down the winning leadership formula that propelled the Cubs to their historic World Series win. Through humor and insightful commentary, Simon will show why the Cubs' leadership approach is spot-on for creating a happy workplace in today's disruptive business environment.

Simon T. Bailey - Leadership Author, Speaker, and CEO, Simon T. Bailey International

Moderator: Trent Clark - World Series winning coach, California Angels

2:15 PM - 3:55 PM | CONCURRENT SESSIONS

The Future of Estate Planning

- ❖ Leverage practical examples for applying new estate laws, including portability and the Illinois estate tax.
- ❖ Prepare for potential changes, including Section 2704 proposed regulations impacting valuation discounts for intra-family transfers.

Paige Goepfert, CPA, MST, CSEP - Senior Manager, RSM US LLP

Tina Milligan, CPA - Managing Director, CTC | myCFO

Increase Your Profitability with Schedule C Clients

- ❖ Discover technology tools to enable you to work virtually while successfully supporting your Schedule C tax clients.
- ❖ Experience in-product demos of QuickBooks Self-Employed (QBSE), QuickBooks Online Accountant (QBOA), ProConnect Tax Online (PTO) and Intuit Link designed to help reduce data entry errors, save time and increase profitability.

Michelle L. Long, CPA, MBA - Owner, Long for Success, LLC

Enforcement of the Affordable Care Act Under the New Administration

- ❖ Understand changes to the employer and individual mandate penalties, premium tax credits and subsidies, the Cadillac tax, information reporting requirements (Forms 1094-B, 1094-C, 1095-B and 1095-C), and other ACA provisions.
- ❖ Be ready to respond to HHS marketplace subsidy notices, IRS assessable payment letters, IRS Letter 5699 requesting missing ACA information returns, as well as how to prepare for 2018.

Kelly Haab-Tallitsch, JD - Attorney, SmithAmundsen LLC

Artificial Intelligence Isn't Just Coming - It's Already Here! Are You Ready?

- ❖ Recognize how you already use machine learning every day and how AI will fundamentally change how you interact with your clients.
- ❖ Examine what block chains might mean for the way we store and share sensitive data.
- ❖ Understand why today's multi-tenanted relational databases and the availability of platform services put advanced AI within reach of everyone.

Amy Vetter, CPA, CITP, CGMA - Global VP, Education and Head of Accounting USA, Xero

Revenue Recognition – Are You Ready?

- ❖ Walk through the five steps in determining revenue recognition and review the disclosure requirements of the new standard.
- ❖ Compare current GAAP with the new standard for various industries including construction.

Kurt G. Oestricher, CPA - Partner, Oestricher & Company, CPAs

Assess Risk in Today's Chaotic/Disruptive/@\$%! Business Environment (Yes, it Can Be Done)

- ❖ Where do I start? Outline the major risk centers that should be on your radar in 2018.
- ❖ Maximize the latest financial modeling approaches to improve future business decisions.

Speaker TBA

Irrational Clients – Are They Crazy or Just Misunderstood?

- ❖ Tap into strategies to set the tone with “difficult” clients.
- ❖ Reveal unspoken client assumptions in order to better understand their needs.
- ❖ Transform contentious discussions to collaborative conversations.

Moderator: Elizabeth Buffardi, CPA, CFP® - Crescendo Financial Planners, Inc.

Panelist: Lisa Dieter, CFP® - Founder, Wealth Advisor, EmberHouse

The Overachiever's Guide to Getting Unstuck

- ❖ Utilize a guided model to help you determine where you're stuck and why.
- ❖ Examine how to work "better" instead of "harder".
- ❖ Discover techniques that will help you get unstuck.

Bill Reeb, CPA, CITP, CGMA - CEO, The Succession Institute

Technology Walking Tour

- ❖ Experience first-hand the exciting developments occurring in the accounting technology arena.
- ❖ Learn how to best approach an exhibitor so you can come away with the answers to your questions.

Gail Perry, CPA - Editor-in-Chief, CPA Practice Advisor

4:15 PM - 5:55 PM | KEYNOTE

Technology Forecast

You read it here first: Edge Computing could soon replace Cloud Computing. What's Edge Computing? Find out, along with other mind-blowing technologies that you've never heard of during Rick's standing room only keynote. It's packed with the latest technology trends and tools that will improve your future IT purchasing decisions and, in the process, allow you to deliver better customer service. You'll get a first-hand look at Hybrid Cloud Technology, the Industrial Internet of Things, new Nano Technology, and other technology trends that will position your organization for the future.

Dana R. "Rick" Richardson, CPA, CITP, CGMA - Technology Futurist and Managing Partner, Richardson Media & Technologies, LLC

Wednesday | 8.30.17

8:00 AM - 9:40 AM | CONCURRENT SESSIONS

Individual Income Tax Reform

- ❖ Discuss the latest tax proposals from Washington, DC and how they might affect your practice.
- ❖ Review new tax laws, court cases, and IRS rulings and procedures, including the Matured Savings Bond Interest issue and the Domestic Production Tax Deduction as it applies to the 1040.

Christopher Bird, EA, CFP - President, Chris Bird Seminars, Inc.

Manage and Scale Your Firm

- ❖ Identify which clients are the right fit for QuickBooks Online Accountant (QBOA) and how to transition them.
- ❖ Explore QBOA tools for viewing and modifying transactions in real time.
- ❖ Learn to employ the Intuit Link application to improve client communication and secure their tax documentation.

Michelle L. Long, CPA, MBA - Owner, Long for Success, LLC

Big Data and Data Analytics: What You Need to Know

- ❖ Define "Big Data" and identify its business implications.
- ❖ Recognize the types of business analytics and decision models used to analyze data.
- ❖ Recognize the risks associated with collection and use of Big Data and data analytics.

Ann Dzurain, PhD - Assistant Professor, Northern Illinois University

How to Slay Those Nasty, Revenue-Killing Technology Challenges

- ❖ Identify the top technology issues that are depleting employee productivity and revenue.
- ❖ Learn how your accounting & finance peers are adding value to their technology infrastructure.
- ❖ Hear about the technology tools that your peers are using to arm their employees for success.

Brian Siet, CPA - Senior Manager, Strategic Relationships, Wolters Kluwer Tax & Accounting US

Hire Smart Now to Avoid the Crazy Expensive Turnover Costs Later

- ❖ Apply behavioral interviewing techniques to uncover strengths and weaknesses before hiring.
- ❖ Audit your hiring process to avoid interviewing errors.
- ❖ Learn how to handle candidates that receive multiple offers and counteroffers.

Krista Caprini, CPA - Senior Manager, Baker Tilly Search & Staffing

Stacy Kelly - Chicago Search Practice Leader/Senior Manager, Baker Tilly Search & Staffing

The New Numbers Cruncher is a Robot: What's Next in Finance Automation

- ❖ Identify opportunities within the finance department that are ripe for automation.
- ❖ Learn how automation can lead to cost savings and position finance as a strategic advisor.
- ❖ Discuss where finance automation is heading in the next few years.

Speaker TBA

10:40 AM - 11:30 AM | KEYNOTE

The 2017-18 Economic Outlook

Economic policy, taxes, and regulation are all changing rapidly. How will these changes impact your business, your clients, and your personal finances? Best-selling author Terry Savage, one of the country's most sought-after economic speakers, will share her perspectives in this "can't-miss" session. Terry will offer her forecasts for the economy, the markets, interest rates, and regulatory changes that are likely to impact the advice given to your clients as well as your business decisions.

Terry Savage - Nationally Syndicated Financial Columnist

Educational Sessions



12:30 PM - 2:10 PM | CONCURRENT SESSIONS

Business Income Tax Reform

- ❖ Discuss the latest tax proposals from Washington, DC and how they might affect small businesses and corporations.
- ❖ Review new tax laws, court cases, and IRS rulings and procedures, including Domestic Production Tax Deduction (including specific examples) and the 21st Century Cures Act as it applies to health insurance reimbursement arrangements.

Christopher Bird, EA, CFP - President, Chris Bird Seminars, Inc.

QuickBooks App Lab

- ❖ Receive a live demo of the various QuickBooks Apps.
- ❖ Learn how to maximize this new technology for increased productivity and profitability.

Stacy Kildal - Owner, Kildal Services LLC

From Hello to Cha-Ching: Converting Contacts into Clients

- ❖ Receive proven tactics to help introverts make networking work for them.
- ❖ Get immediate, actionable strategies for converting business cards into valued clients.

Vickie Austin - Founder, CHOICES Worldwide

Grow Your Audit Business Today with Tomorrow's Technology

- ❖ Examine trends that are shifting the audit world toward greater use of technology.
- ❖ Discover the latest technological opportunities that exist for growing your audit business.
- ❖ Identify the auditing areas that will position your firm to deliver exceptional value to customers.

Matt Towers - Product Manager, Audit and Engagement, Thomson Reuters

Do the Math: Companies with Great Technology = Attracting Top Talent

- ❖ Identify tools to meet the technology needs of the next generation of workers.
- ❖ Parlay your technology into a recruitment magnet.
- ❖ Hear how your technology can project your organization values to potential hires.

Amy Vetter, CPA, CITP, CGMA - Global VP, Education & Head of Accounting USA, Xero

Keep Your Bottom Line and Top Talent Happy with Great, Cost-Effective Employee Perks

- ❖ Examine the top trends in employee perks and benefits in 2018 and beyond.
- ❖ Discover the untraditional employee perks you've probably never heard of.

Speaker TBA

Technology Walking Tour

- ❖ Experience first-hand the exciting developments occurring in the accounting technology arena.
- ❖ Learn how to best approach an exhibitor so you can come away with the answers to your questions.

Gail Perry, CPA - Editor-in-Chief, CPA Practice Advisor

3:35 PM - 5:15 PM | CONCURRENT SESSIONS

Not-for-Profit Tax Reform

- ❖ Explore how the Washington, DC tax reform proposals will affect not-for-profit taxes.
- ❖ Hear the latest IRS issues, cases, and rulings.
- ❖ Discuss audit traps for not-for-profits and receive practical tips for staying out of tax trouble.

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

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

A No-Nonsense Guide to Becoming a CFO or Firm Partner

- ❖ Find out what projects to take on now that will position you for future career glory.
- ❖ Identify and sidestep the pitfalls that could hinder your rise to the top.
- ❖ Obtain the necessary CFO and firm partner skills they don't teach you in school.

Moderator: Ralph Gaillard, M.Ed. - Chief Learning Director, Illinois CPA Society

Thomas B. Murtagh, CPA, JD - Partner, BKD, LLP

Ash Noah, CPA, CGMA - Vice President, CGMA External Relations, Management Accounting, Association of International Certified Professional Accountants

Got \$15 Million? How to Dodge the High Costs of a Cyberattack

- ❖ Increase your cybersecurity without breaking the bank and wasting precious resources.
- ❖ Obtain the best advice on bleeding vs. leading cybersecurity tools—those that deliver ROI.
- ❖ Discover how to maximize your organization's current IT infrastructure as part of your cybersecurity plan.

Jerry N. Irvine - CIO, Prescient Solutions

Is Your Current Workplace Culture Causing Your Top Hires to Flee?

- ❖ Examine whether your existing culture provides or limits opportunities for employee retention.
- ❖ Apply concepts of buy-in to increase employee engagement and participation.
- ❖ Use theories of motivation to positively impact team member actions.

Julius E. Rhodes, SPHR - Founder and Principal, mpr group

Top Ten 401(k) Mistakes

- ❖ Learn about problems that arise under ERISA's Fiduciary Rules.
- ❖ See issues arising from Prohibited Transaction rules.
- ❖ Stay in DOL compliance with changes that need to be adapted before the end of 2017.

John Baker Welch - Economist, William Blair & Company

REGISTRATION OPTIONS

✓	Code:	Date:	Title:	ICPAS M/NM:	Total:
<input type="checkbox"/>	PC1	8/28	Pre-Conference Workshops - select session on next page (Registration for the SHOW Session Pass or Connections Hall is required)	\$180	\$ _____
<input type="checkbox"/>	RB1	8/29-30	2-Day Session Pass & Access to Connections Hall	\$325/\$350	\$ _____
<input type="checkbox"/>	RD1	8/29	1-Day Session Pass & Access to Connections Hall (Tuesday)	\$280/\$305	\$ _____
<input type="checkbox"/>	RD2	8/30	1-Day Session Pass & Access to Connections Hall (Wednesday)	\$280/\$305	\$ _____
<input type="checkbox"/>	EXH	8/29-30	Connections Hall Only (\$25 Value)	FREE	\$0

UNIVERSITY ALUMNI LUNCHEONS

✓	Code:	Date:	Title:	ICPAS M/NM:	Total:
<input type="checkbox"/>	007	8/29	Northern Illinois University	FREE	\$0
<input type="checkbox"/>	008	8/29	Illinois State University	FREE	\$0
<input type="checkbox"/>	009	8/29	Loyola University	FREE	\$0

TOTAL AMOUNT ENCLOSED: \$ _____

☐ **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?

Russell Flagg - Exhibit Sales Manager
FLAGG MANAGEMENT, INC.
212.286.0333 | flaggmgmt@msn.com
www.flaggmgmt.com

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 Foundation) ☐ Visa ☐ MasterCard ☐ Discover Card ☐ Amex

Card Number: _____ Exp. Date: _____

Cardholder Name: _____

Signature: _____

REGISTER INFORMATION (AVOID THE LINES. PRE-REGISTER TODAY!)

Pre-Registration Deadlines:

- **BEFORE August 18, 2017** and your confirmation and admittance badge will be **MAILED** to you.
- **BETWEEN August 19-25, 2017** and you may **PICK UP** your admittance badge at the advance registration desk at the Showcase.
- **AFTER August 25, 2017** you may **BRING** the completed form to register on-site at the Showcase.

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 SHOW, please notify us on the registration form. We will contact you for more details.

WEBSITE

www.icpas.org/show

FAX (Both Pages)

This form with credit card information to: **312.993.9432**

MAIL (Both Pages)

With check or credit card information to
Illinois CPA Foundation, Attention Member Services
550 W. Jackson Blvd., Suite 900, Chicago, IL 60661-5742

QUESTIONS

or for more information, call **800.993.0407**

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:	FOS:	CPE/CLE/CFP/EA:
MONDAY, AUGUST 28, 2017				
<input type="checkbox"/> 005	1:00 ^{AM} - 4:30 ^{PM}	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 ^{AM} - 4:30 ^{PM}	Zealously Protecting Your Clients from the IRS	3 Taxation, 1 Behavioral Ethics	4 CPE/3.25 CLE/4 CFP/4 EA
TUESDAY, AUGUST 29, 2017				
<input type="checkbox"/> 100	8:00^{AM} - 9:15^{AM}	Keynote: The Evolving CPA Profession	1.5 Accounting	1.5 CPE
<input type="checkbox"/> 101	9:45 ^{AM} - 11:25 ^{AM}	State and Local Tax Update	2 Taxation	2 CPE/1.5 CLE/2 CFP
<input type="checkbox"/> 102	9:45 ^{AM} - 11:25 ^{AM}	Design Your Dream Practice	2 Management Advisory Services	2 CPE
<input type="checkbox"/> 103	9:45 ^{AM} - 11:25 ^{AM}	Healthcare for Small Businesses	2 Specialized Knowledge & Applications	2 CPE
<input type="checkbox"/> 104	9:45 ^{AM} - 11:25 ^{AM}	Anatomy of a Cyberattack: See it Happen and How to Mitigate the Damage	2 Computer Science	2 CPE
<input type="checkbox"/> 105	9:45 ^{AM} - 11:25 ^{AM}	Accounting & Auditing Update	1 Accounting, 1 Auditing	2 CPE
<input type="checkbox"/> 106	9:45 ^{AM} - 11:25 ^{AM}	Move from Backroom Accountant to Strategic Advisor Using Better Data	2 Specialized Knowledge & Applications	2 CPE
<input type="checkbox"/> 107	9:45 ^{AM} - 11:25 ^{AM}	Increase Your Practice Value with Business Retirement Services	2 Business Management & Organization	2 CPE/2 CFP
<input type="checkbox"/> 108	9:45 ^{AM} - 11:25 ^{AM}	Boost Future Revenue: Position Yourself as a Trusted Business Advisor	2 Business Management & Organization	2 CPE
<input type="checkbox"/> 109	12:20^{PM} - 1:35^{PM}	Keynote: What the Chicago Cubs Can Teach Us About Creating a Great Place to Work	1.5 Personnel/HR	1.5 CPE
<input type="checkbox"/> 110	2:15 ^{PM} - 3:55 ^{PM}	The Future of Estate Planning	2 Taxation	2 CPE/1.5 CLE/2 CFP/2 EA
<input type="checkbox"/> 111	2:15 ^{PM} - 3:55 ^{PM}	Increase Your Profitability with Schedule C Clients	2 Computer Science	2 CPE
<input type="checkbox"/> 112	2:15 ^{PM} - 3:55 ^{PM}	Enforcement of the Affordable Care Act Under the New Administration	2 Taxation	2 CPE/1.5 CLE/2 CFP/2 EA
<input type="checkbox"/> 113	2:15 ^{PM} - 3:55 ^{PM}	Artificial Intelligence Isn't Just Coming - It's Already Here! Are You Ready?	2 Computer Science	2 CPE
<input type="checkbox"/> 114	2:15 ^{PM} - 3:55 ^{PM}	Revenue Recognition - Are You Ready?	2 Accounting	2 CPE
<input type="checkbox"/> 115	2:15 ^{PM} - 3:55 ^{PM}	Assess Risk in Today's Chaotic/Disruptive/?@\$%! Business Environment (Yes, it Can Be Done)	2 Specialized Knowledge & Applications	2 CPE
<input type="checkbox"/> 116	2:15 ^{PM} - 3:55 ^{PM}	Irrational Clients - Are They Crazy, or Just Misunderstood?	2 Personal Development	2 CPE/2 CFP
<input type="checkbox"/> 117	2:15 ^{PM} - 3:55 ^{PM}	The Overachiever's Guide to Getting Unstuck	2 Personal Development	2 CPE
<input type="checkbox"/> 118	2:15 ^{PM} - 3:55 ^{PM}	Technology Walking Tour	2 Computer Science	2 CPE
<input type="checkbox"/> 119	4:15^{PM} - 5:55^{PM}	Keynote: Technology Forecast	2 Computer Science	2 CPE
WEDNESDAY, AUGUST 30, 2017				
<input type="checkbox"/> 200	8:00 ^{AM} - 9:40 ^{AM}	Individual Income Tax Reform	2 Taxation	2 CPE/1.5 CLE/2 CFP/2 EA
<input type="checkbox"/> 201	8:00 ^{AM} - 9:40 ^{AM}	Manage and Scale Your Firm	2 Computer Science	2 CPE
<input type="checkbox"/> 202	8:00 ^{AM} - 9:40 ^{AM}	Big Data and Data Analytics: What You Need to Know	2 Specialized Knowledge & Applications	2 CPE
<input type="checkbox"/> 203	8:00 ^{AM} - 9:40 ^{AM}	How to Slay Those Nasty, Revenue-Killing Technology Challenges	2 Computer Science	2 CPE
<input type="checkbox"/> 204	8:00 ^{AM} - 9:40 ^{AM}	Hire Smart Now to Avoid the Crazy Expensive Turnover Costs Later	2 Personnel/HR	2 CPE
<input type="checkbox"/> 205	8:00 ^{AM} - 9:40 ^{AM}	The New Numbers Cruncher is a Robot: What's Next in Finance Automation	2 Computer Science	2 CPE
<input type="checkbox"/> 206	10:40^{AM} - 11:30^{AM}	Keynote: The 2017-18 Economic Outlook	1 Economics	1 CPE/1 CFP
<input type="checkbox"/> 207	12:30 ^{PM} - 2:10 ^{PM}	Business Income Tax Reform	2 Taxation	2 CPE/1.5 CLE/2 CFP/2 EA
<input type="checkbox"/> 208	12:30 ^{PM} - 2:10 ^{PM}	QuickBooks App Lab	2 Computer Science	2 CPE
<input type="checkbox"/> 209	12:30 ^{PM} - 2:10 ^{PM}	From Hello to Cha-Ching: Converting Contacts into Clients	2 Personal Development	2 CPE
<input type="checkbox"/> 210	12:30 ^{PM} - 2:10 ^{PM}	Grow Your Audit Business Today with Tomorrow's Technology	2 Computer Science	2 CPE
<input type="checkbox"/> 211	12:30 ^{PM} - 2:10 ^{PM}	Do the Math: Companies with Great Technology = Attracting Top Talent	2 Personnel/HR	2 CPE
<input type="checkbox"/> 212	12:30 ^{PM} - 2:10 ^{PM}	Keep Your Bottom Line and Top Talent Happy with Great, Cost-Effective Employee Perks	2 Personnel/HR	2 CPE
<input type="checkbox"/> 213	12:30 ^{PM} - 2:10 ^{PM}	Technology Walking Tour	2 Computer Science	2 CPE
<input type="checkbox"/> 214	3:35 ^{PM} - 5:15 ^{PM}	Not-for-Profit Tax Reform	2 Taxation	2 CPE/1.5 CLE/2 EA
<input type="checkbox"/> 215	3:35 ^{PM} - 5:15 ^{PM}	A No-Nonsense Guide to Becoming a CFO or Firm Partner	2 Personal Development	2 CPE
<input type="checkbox"/> 216	3:35 ^{PM} - 5:15 ^{PM}	Got \$15 Million? How to Dodge the High Costs of a Cyberattack	2 Computer Science	2 CPE
<input type="checkbox"/> 217	3:35 ^{PM} - 5:15 ^{PM}	Is Your Current Workplace Culture Causing Your Top Hires to Flee?	2 Personnel/HR	2 CPE
<input type="checkbox"/> 218	3:35 ^{PM} - 5:15 ^{PM}	Top Ten 401(k) Mistakes	2 Personnel/HR	2 CPE



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