ICPAS SUMMIT™ 22
The Premier Event for Accounting and Finance Professionals™

In-Person and Virtual Options Available
Register today at www.icpas.org/summit

Incredible Value!
16 CPE Hours for ONLY $365*
*members

THE NEXT FRONTIER

Tuesday-Wednesday
August 23-24, 2022
Donald E. Stephens Convention Center
Rosemont, Illinois
Expert Keynote Speakers:

The State of the CPA Profession: Being Relevant in the Next Frontier

Mary Fuller, CPA
Chairperson, Illinois CPA Society, and
Managing Partner-Chicago Office, Citrin Cooperman

Todd Shapiro
President and CEO, Illinois CPA Society

Leveraging Technology for Success

Roman Kepczyk, CPA, CITP,
CGMA, LSS BB
Director of Firm Technology Strategy,
Right Networks

The Future of Work

Moderator: Todd Shapiro
President and CEO, Illinois CPA Society

The Economy in Unprecedented Times

Derek Sasveld, CFA
Former Senior Investment Strategist,
BMO Global Asset Management

Jim Boomer
CEO, Boomer Consulting, Inc.

Steve Latreille
Vice President of Finance, North America,
Ingredion Incorporated

Kate Ward, CPA
Partner, Kerber, Eck & Braeckel LLP
Innovative Learning Tracks:
Personalize your learning with five topic tracks to choose from:
Accounting and Auditing/Government
Corporate Strategy/Human Capital
Ethics/Personal Development
Tax
Technology Solutions/Advisory Services

CPE Credits and More:
Earn while you learn! 16 CPE hours, plus:
2 Ethics | 1 Sexual Harassment Prevention Training
7.5 CLE* | 11.5 CFP* | 8 EA* | 2 Yellow Book
*Specialty Credits Pending Approval

Engaging Exhibitor Experiences:
Get hands on with the latest products and services from exhibitors such as:
ABGi | Mango
BKR | Mariner Wealth Advisors
blue J | Millennium Trust Company
Canopy Tax | Pavestep
CPA Charge | planguru
Drake Software | Robert Half
GigTel | Safe Send
goVirtualOffice | Saling Simms Associates
IRS Trouble Solvers | Tipalti
KBKG | Zoho
LeaseQuery

(All exhibitors will be available in-person and virtually.)

What’s The Word?
“I look forward to the SUMMIT every year.”
“Great information and learning for a great value!”
“Excellent presentations and knowledgeable speakers.”
“Thank you for making the in-person option available — it was so good to be here with people!”
“The virtual platform is great and easy to navigate.”
“All-around top-notch speakers.”

PLEASE NOTE:
All program information is subject to change. Please verify upon registration.
The Illinois CPA Society reserves the right to modify the delivery of SUMMIT22 sessions in response to ongoing changes in COVID-19 restrictions.
# DAY ONE AT-A-GLANCE

**Tuesday, August 23, 2022**

<table>
<thead>
<tr>
<th>Time</th>
<th>Tracks</th>
<th>Keynote</th>
<th>Break</th>
<th>Sessions</th>
<th>Keynote</th>
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<tbody>
<tr>
<td>10:45 AM</td>
<td>SESSIONS: Ethics/Personal Development</td>
<td>Introducing Clients to PFP Services Code: 103 CLE: 0.75* CFP: 1*</td>
<td>11:30 AM</td>
<td>Professional Ethics Code: 108 CLE: 0.75* ETHICS: 1</td>
<td>Auditing Update: Part 2 Code: 122</td>
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<tr>
<td>3:45 PM</td>
<td>SESSIONS: Technology Solutions/Advisory Services</td>
<td>Creating Scalable Advisory Services That Sell Code: 125</td>
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</table>
Register today! These workshops will sell out quickly.
Please note: These workshops are optional and require a separate registration.
The pre-conference workshops will only be offered virtually. No in-person option is available.

1:00 PM - 4:30 PM | CONCURRENT WORKSHOP I

Basic Trusts: Taxation of Trusts and Preparing Form 1041

Roll up your sleeves and participate in a hands-on preparation of Form 1041. Hear why trusts and estates are created and understand the latest legal developments and fiduciary income tax return filing requirements. Plus, identify potential planning and consulting opportunities.

Lee Arbus, CPA, JD, LLM | Partner, Levun, Goodman & Cohen, LLP
Jonathan Beer, JD, LLM | Attorney, Levun, Goodman & Cohen, LLP

1:00 PM - 4:30 PM | CONCURRENT WORKSHOP II

Who’s the Boss: Tax Practitioners Panel

Interested in starting your own tax practice? Learn from seasoned panelists as they discuss lessons learned and challenges encountered in starting and sustaining a practice.

Jeff Badu, CPA | Founder and CEO, Badu Tax Services, LLC
Norris Harstad, CPA | Owner, ONH Ltd.
Mark Heroux, JD | Partner, Baker Tilly US LLP
Luis Plascencia, CPA, MST | Principal, Luis V Plascencia, CPA
Andrew VanSingel, Esq. | Local Taxpayer Advocate, Taxpayer Advocate Service
Jessica Velazquez | Executive Assistant, Indiva Advisors, LLP
Cari Weston, MST, CPA, CGMA | Executive Director, Center for Accounting Transformation
Jennifer Williams, CPA | Principal/Owner, Pillar Financial Services
Tuesday
8.23.22

8:00 AM - 9:15 AM
The State of the CPA Profession: Being Relevant in the Next Frontier
The business environment continues to rapidly change, making relevance the top issue facing the CPA profession. CPAs must move beyond being “the most trusted business advisors” to being “the most trusted and strategic business advisors.” Hear about current professional issues and the skill sets, tool sets, and mindsets needed to ensure our relevance as we go boldly into the future.

Mary Fuller, CPA
Chairperson, Illinois CPA Society, and Managing Partner-Chicago Office, Citrin Cooperman

Todd Shapiro
President and CEO, Illinois CPA Society

9:40 AM - 10:30 AM
Individual Tax Update: Part 1
Receive an inside look at recent developments impacting individual taxpayers and discuss other initiatives on the legislative horizon. Plus, walk away with various tax planning ideas and opportunities to help navigate today’s evolving environment.

Damien Martin, CPA
Partner, FORVIS

9:40 AM - 10:30 AM
SSARS 25: Review Engagements
Review the key provisions of SSARS 25 and learn best practices for implementation in review engagements. Understand the impacts to materiality and the necessary changes to the review report.

Kelli Cloutier, CPA
Shareholder, Mayer Hoffman McCann, P.C.

9:40 AM - 10:30 AM
Introducing Clients to PFP Services
Discover best practices for introducing personal financial planning (PFP) services to your clients through personalized conversations that focus on their goals, values, and needs.

Kelley Long, CPA/PFS, CFP
Owner, Kelley C. Long Consulting LLC
## Concurrent Educational Sessions
### 8.23.22

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Description</th>
<th>Presenter(s)</th>
</tr>
</thead>
</table>
| 9:40 AM - 10:30 AM | Strengthening Finance and Accounting’s Role in Corporate Strategy       | Hear how finance and accounting professionals can claim a seat at the strategy development table. Understand how to analyze strategic decisions from a financial perspective and how to use data to validate assumptions and assess opportunities. | Claire Burke, MBA, CPA  
Vice President, CFO & Treasurer, Dearborn Group                              |
| 9:40 AM - 10:30 AM | Digital Transformation and Frictionless Finance                          | Analyze the technological advancements propelling the evolution of the finance function and learn how to lead, rather than react, to these innovations. Examine how digital transformation speeds up the “data to decision” process and how to leverage it for greater value creation. | Ash Noah, CPA, CGMA, FCMA  
VP and Managing Director, Management Accounting, AICPA and CIMA              |
| 10:40 AM - 11:30 AM | Individual Tax Update: Part 2                                           | But wait, there’s more! Learn how the recent developments discussed in the “Individual Tax Update: Part 1” session will impact overall tax planning strategies for individuals and their families. | Damien Martin, CPA  
Partner, FORVIS                                                               |
| 10:40 AM - 11:30 AM | ESG and Financial Reporting                                             | Explore how to integrate environmental, social and governance (ESG) concepts into your daily management and external reporting. Leave with a roadmap to launch your ESG plan or take your existing efforts to the next level to help drive value creation. | Mary Adams  
Founder, Smarter-Companies  
Marcy Twete, MBA  
CEO, Marcy Twete Consulting                                                   |
| 10:40 AM - 11:30 AM | Professional Ethics                                                    | Learn how to implement the conceptional framework of the AICPA’s Code of Professional Conduct in your daily practice and use it to resolve ethical conflicts. | Kurt Oestriecher, CPA  
Partner, Oestriecher & Company, CPAs                                         |
| 10:40 AM - 11:30 AM | Decoding Worker Classification Challenges                                | With the influx of remote and hybrid workplaces, worker classification has become even more challenging. Understand the rules governing W-2 employees, 1099 contractors, overtime exempt status, and more. Plus, receive practical tips for navigating real-life situations to avoid audits and legal claims. | Lori Goldstein, JD  
Employment Attorney, Law Office of Lori A. Goldstein LLC                      |
<table>
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<td>10:40 AM - 11:30 AM</td>
<td>Becoming an Entrepreneurial Accountant</td>
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<tr>
<td>For many accountants, there are two typical career paths: work in a public accounting firm or work in corporate finance. However, an overlooked third path is where entrepreneurship and accounting intersect. Explore how this path can lead you to starting a business, running your own accounting firm, or finding an entrepreneurial niche in a traditional setting.</td>
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<tr>
<td>Joshua Lance, CPA, CGMA Managing Director, Lance CPA Group</td>
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| 12:25 PM - 1:15 PM | Accounting for Contested Trusts and Estates |
| Learn how to prepare documents for a contested trust or estate that will stand up to legal scrutiny and avoid liability. Plus, hear tips for reviewing documents prepared by others to ensure beneficiary clients and their lawyers can protect their gifts and inheritances. |
| Ray Prather, JD, CPA, CFF Partner, Prather Ebner LLP |

| 12:25 PM - 1:15 PM | Developing and Retaining Diverse Talent |
| Discover innovative ways to support diverse new hires at your organization in order to increase retention and ensure every person on the team has the potential to succeed and grow. |
| Kari Natale, CAE Senior Director, CPA Endowment Fund of Illinois, Illinois CPA Society |

| 12:25 PM - 1:15 PM | Building Flexible Models With Microsoft Excel’s New Dynamic Arrays |
| Working with actual company data and models, discover Excel’s new dynamic arrays functions, which allows models to self-update with minimal human involvement. Discover which dynamic functions are the most appropriate and advantageous in various situations. |
| Carl Seidman, CPA/CFF, CSP CIRA, CFE, CGMA, AM Principal, Seidman Financial |

| 12:25 PM - 1:15 PM | Business Tax Update: Part 1 |
| It’s been another busy and turbulent year in the business world. Dig into the latest tax developments impacting businesses and receive a preview of what potentially lies ahead. |
| Damien Martin, CPA Partner, FORVIS |

| 12:25 PM - 1:15 PM | Advanced Financial Planning Strategies to Help Clients Retire With Confidence |
| Review four key aspects to address with clients as they prepare for retirement, including calculating retirement readiness, investment changes, estate planning documents review, and shifting to a non-work mindset. |
| Kelley Long, CPA/PFS, CFP Owner, Kelley C. Long Consulting LLC |
Concurrent Educational Sessions
8.23.22

1:25 PM - 2:15 PM
Business Tax Update: Part 2
Continue the discussion from the “Business Tax Update: Part 1” session and hear how recent developments will impact long-term planning. Walk away with strategies for navigating the current landscape.
Damien Martin, CPA
Partner, FORVIS

1:25 PM - 2:15 PM
Auditing Update: Part 1
The Auditing Standards Board has issued new guidance that impacts the auditor’s report, ERISA audits, auditing estimates, and audit planning issues. Understand the key changes to the audit report, learn how to determine the applicability of key audit matters, and receive implementation guidance for ERISA audits.
Kurt Oestriecher, CPA
Partner, Oestriecher & Company, CPAs

1:25 PM - 2:15 PM
Making Feedback Work
Feedback is a complex two-way process. Dive into how to deliver feedback successfully and accept feedback constructively to increase your effectiveness, grow the skills of your team, and enhance the culture of your organization – even in virtual and hybrid environments.
Matt Booth, CPA, MBA
Retired Partner, PwC
John Philbin, Ph.D.
Founder, Spectacular at Work

1:25 PM - 2:15 PM
Change Management: Practical Solutions
Receive practical suggestions for overcoming resistance to change by listening to your stakeholders’ concerns and using open communication that explains the “why, who, what, how, and when.” Learn how to apply the Collaboration Effect to effectively manage change.
Michael Gregory, MS, MBA
Founder, Michael Gregory Consulting LLC

1:25 PM - 2:15 PM
Automating Your Accounting and Financial Reporting Processes
Discuss the latest automation trends and hear how these transformations will impact the future of work and the workforce. Review specific applications in the controllership function, internal audit, and more. Plus, learn about opportunities and challenges for scaling.
Kirti Parakh, CPA
Senior Manager, Deloitte

2:40 PM - 3:30 PM
Cryptocurrency: Top 10 Tax Mistakes
Uncover the top 10 mistakes commonly made in cryptocurrency tax reporting and walk away with an action plan to avoid them.
Guinevere Moore, JD
Managing Member, Moore Tax Law Group LLC
2:40 PM - 3:30 PM

Auditing Update: Part 2

Continue the deep dive into newly issued Accounting Standards Board guidance, including tips for implementing auditing accounting estimates. Learn how to modify audit planning for disclosure issues and how to determine the most effective and efficient audit evidence.

Kurt Oestriecher, CPA
Partner, Oestriecher & Company, CPAs

2:40 PM - 3:30 PM

Corporate Strategy and FP&A

Discuss the impact of corporate strategy on financial planning and analysis (FP&A) and identify the drivers of organizational growth. Learn to forecast in real time the financial impact of key strategic and operational initiatives.

Carl Seidman, CPA/CFF, CSP
CIRA, CFE, CGMA, AM
Principal, Seidman Financial

2:40 PM - 3:30 PM

Creating Scalable Advisory Services That Sell

Uncover the value of delivering advisory services for both your clients and for your firm. Discuss the key elements and best practices to include in every advisory proposal and learn how to create opportunities to sell this service to your clients.

Joshua Lance, CPA, CGMA
Managing Director, Lance CPA Group

2:40 PM - 3:30 PM

Creative Thinking and Problem Solving

Learn to make better business decisions through creative thinking and problem solving. Work through a process to develop your own creativity using current methodology thinking and apply it to practical business applications.

Michael Gregory, MS, MBA
Founder, Michael Gregory Consulting, LLC

3:45 PM - 5:00 PM

KEYNOTE

Leveraging Technology for Success

Rapid innovation is reshaping the accounting profession like never before. Unravel potential disruptors, such as Blockchain, AI, RPA, and ML, as well as the importance of building a modern business technology stack incorporating the latest accounting tools and technologies. Learn how to optimize IT infrastructure, particularly around today’s hybrid/remote work models, and discuss the impact recent changes are having on IT staffing. Hear the latest recommendations on cybersecurity and discuss how to transform production processes by taking a “LEAN” approach.

Roman Kepczyk, CPA, CITP, CGMA, LSS BB
Director of Firm Technology Strategy, Right Networks
Wednesday
8.24.22

8:00 AM - 9:15 AM  
**The Economy in Unprecedented Times**

Unprecedented fiscal and monetary policy support in 2020 and 2021 helped the economy recover from the initial COVID-19 recession, but also planted seeds for the highest inflation rate in two generations. We’ll discuss inflation drivers, describe strategies to reduce it, evaluate the effects of those strategies on future economic growth, and estimate the likelihood of recession in the year to come.

*Derek Sasveld, CFA*  
Former Senior Investment Strategist, BMO Global Asset Management

9:40 AM - 10:30 AM  
**Fun With Succession Planning and Taxes**

Business owners have a number of ways to transition their company. Hear about the various options available, as well as the potential to generate disproportionate value to owners, employees, and the company through the utilization of an ESOP. Plus, learn about proposed and upcoming tax changes that can impact some of these succession options.

*Danny Torello, CPA*  
Real Estate and Construction Tax Partner, Crowe LLP
9:40 AM - 10:30 AM

What’s Up at FASB in 2022?
The amount of change in the accounting profession is overwhelming. Receive a high-level update on standards issued by FASB that are going live this year and discuss recent developments from the Private Company Council.

Leah Donti, CPA, CMA, MBA
Founder and President, Advantage Montreal Seminars Inc.

9:40 AM - 10:30 AM

Accounting Skill Set Shift: Analytics
Stop just processing and reporting data and start analyzing it. Explore different methods to enhance your and your team’s analytical skills and create a plan to facilitate that development.

John Brown, MBA
Senior Director, Corporate Accounting and Financial Operations, Discover Financial Services

9:40 AM - 10:30 AM

Not-for-Profit Corporate Governance: Shaken, Not Stirred
New methods of decision-making have caused unforeseen problems. Claims against not-for-profits have become more common, and IRS interest in governance issues has increased. Learn how to avoid pitfalls and hear best practices for proactively managing governance objectives.

Paula Goedert, JD
Partner, Barnes & Thornburg LLP

9:40 AM - 10:30 AM

Making the Hybrid Work Model Work for You
Whether you’ve already adopted a hybrid work model or are just starting to consider it, discover ways to leverage this new way of working and increase efficiencies. Plus, explore strategies that successful offices are using to make hybrid work for them.

Heidi Rogers
Account Manager, CPAC enfer

10:40 AM - 11:30 AM

Multi-State Tax Update
It’s inevitable that things must change, but do they have to change so drastically? Review the numerous state tax law changes that have occurred this past year, including updates on PTE elections, and the MTC’s revamped P.L. 86-272 nexus creating activities. Discuss some of your favorite states like California and Texas, as well as various apportionment items.

Jason Parish, CPA, MST
Tax Principal, Plante Moran, PLLC

10:40 AM - 11:30 AM

Implementing the New Lease Standard: Get Ready
The new lease standard will go down in history as the most complex standard ever introduced by FASB and this is the year of adoption for private companies and not-for-profit organizations. Discuss implementation challenges, practice issues, lessons learned from public companies, and recently issued FASB accounting standards updates.

Leah Donti, CPA, CMA, MBA
Founder and President, Advantage Montreal Seminars Inc.
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<td>Be Aware or Beware: Drivers of Large Malpractice Claims</td>
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<td>Unfortunately, there is no crystal ball to tell CPA firms what will happen when a new client or engagement is accepted. Everything could go smoothly, or a dispute could arise. Identify the warning signs of a potentially large malpractice claim and learn how to mitigate the risks of it occurring at your firm.</td>
</tr>
<tr>
<td>Sarah Ference, CPA</td>
<td>Risk Control Director, CNA Insurance</td>
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<tr>
<td>Deborah Rood, CPA, MST</td>
<td>Risk Control Consulting Director, CNA Insurance</td>
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<tr>
<td>10:40 AM - 11:30 AM</td>
<td>Emerging Trends in Cybersecurity</td>
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<td>Cyber threats are increasing every day, with real impact to business operations. Understand emerging threat vectors and learn how to manage vulnerabilities. Discuss hot topics, including secure supply chains, as well as reporting and regulatory compliance responsibilities.</td>
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<td>Sharon Chand, CISSP</td>
<td>Principal, Deloitte</td>
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<tr>
<td>12:25 PM - 1:15 PM</td>
<td>Virtual Currency Transactions: Successfully Serving Clients</td>
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<td>Walk through the tax implications of investing in cryptocurrency, running a mining operation, NFTs, and using cryptocurrency as a payment method. Learn how to successfully navigate challenges, including tax notices, and how to identify and apply planning opportunities.</td>
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<tr>
<td>Shehan Chandrasekera, CPA</td>
<td>Head of Tax Strategy, CoinTracker</td>
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<tr>
<td>12:25 PM - 1:15 PM</td>
<td>GASB Update</td>
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<td>Hear about recently released and soon to be implemented GASB pronouncements, as well as other topics that are on the horizon. Plus, review common implementation pitfalls and learn strategies for avoiding them.</td>
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<td>Michael Malatt, CPA</td>
<td>Senior Manager, Baker Tilly US LLP</td>
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<td>12:25 PM - 1:15 PM</td>
<td>Developing and Enhancing Your Technical Skills</td>
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<td>No matter where you work, your technical skills are essential to your professional success. Receive practical advice for staying current, including tips for developing a comprehensive reading and development plan.</td>
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<tr>
<td>Jerry Maginnis, CPA</td>
<td>Board Member, Audit Committee Chairman, Cohen &amp; Steers Mutual Funds</td>
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Concurrent Educational Sessions
8.24.22

12:25 PM - 1:15 PM
The Post-COVID Paradox
In the current employment environment, employers are relying even more on benefits and compensation to attract talent, but at the same time must manage the escalating costs of those items. Learn proven employee benefit cost management methods while still maintaining a strong employee value proposition.

Angelo Scozia, CEBS, CFP
Senior Director, Health, Wealth and Career, Willis Towers Watson

12:25 PM - 1:15 PM
Process + Technology = Opportunities
Effective processes may improve efficiency, and optimized technology is a good foundation. But, aligning these two offers the opportunity to accelerate and build capacity for your firm and your clients. Learn how to implement a five-step process for digital transformation in your firm.

Jim Boomer
CEO, Boomer Consulting, Inc.

1:25 PM - 2:15 PM
Not-for-Profit Tax Update
The IRS has increased their enforcement efforts on the tax-exempt sector over the past year. Review compliance strategies to ensure you’re well positioned to answer checks or examinations. Dissect the latest legislation and receive an overview on additional guidance from the IRS and other authorities.

Rebekuh Eley, CPA, MST
Tax Partner, Exempt Organizations, RSM US LLP

1:25 PM - 2:15 PM
Audit Quality Standards: Proposed Statements on Quality Management
Learn about the proposed statements on quality management, explore the key changes expected, and understand the potential impact to your future audits.

Kara Farenbach, CPA
Senior Manager, Plante Moran, PLLC
Melissa Lynch, CPA
Partner, Assurance – Service Industries, Plante Moran, PLLC

1:25 PM - 2:15 PM
Preventing and Investigating Sexual and Other Harassment in a #MeToo and COVID-19 World
Understand what constitutes sexual and other harassment, and learn strategies to investigate and address harassment claims that protect both the employees and the employer. Review the federal and state laws that apply to harassment situations, including remedies available for victims and whistleblower protections.

Jonathan Vegosen, JD
Founding Member, Funkhouser Vegosen Liebman & Dunn Ltd.

1:25 PM - 2:15 PM
How to Keep Your Organization From Drowning in the Turnover Tsunami
Identify the primary reasons employees are leaving and develop an “always-recruiting and always-onboarding” strategy to retain them. Learn to deepen staff engagement with meaningful work, connection, and a clear path forward.

Jon Lokhorst, CPA, PCC
Executive Leadership Coach, Lokhorst Consulting LLC
Concurrent Educational Sessions
8.24.22

1:25 PM - 2:15 PM
Your Client Wants to Sell? How to Effectively Market Their Business
Discover business valuation techniques and proven marketing strategies for generating competing offers. Review typical deal structures, offer terms, due diligence best practices, and transaction documents needed for closing.

Jamar Cobb-Dennard, JD
Business Broker, Indiana Business Advisors

2:40 PM - 3:30 PM
Government and Fraud
Walk through the current governmental fraud landscape, including common schemes and new trends. Discuss real-world cases and explore best practices and creative strategies for mitigating daily risks.

Michael Malatt, CPA
Senior Manager, Baker Tilly US LLP

2:40 PM - 3:30 PM
Illinois Taxes: Getting It Right!
Take a deep dive into Illinois’ unique state income and sales/use tax laws. Understand the impact of recent changes and discover how to avoid the common traps and blind spots.

Joseph Bigane III, CPA, MST
Managing Director, JFB Tax Consulting LLC

2:40 PM - 3:30 PM
Developing a Value Creation Mindset
The ability to add value is a key determinant of success. Receive practical advice on how to “think like an owner” and consistently create value for your clients or company. Understand the importance of continually seeking and providing feedback as part of this mindset.

Jerry Maginnis, CPA
Board Member, Audit Committee Chairman, inTEST Corporation, Cohen & Steers Mutual Funds

2:40 PM - 3:30 PM
Employment Discrimination Law Basics
Explore four types of workplace discrimination and the federal and state laws in place to address them. Learn steps to take – from both an employee and employer perspective – if discrimination occurs, including evidentiary standards for litigation. Walk away with strategies to prevent discrimination at your workplace.

Jonathan Vegosen, JD
Founding Member, Funkhouser Vegosen Liebman & Dunn Ltd.

2:40 PM - 3:30 PM
Enhancing Your Competitiveness While Minimizing Risk
Enhancing a CPA’s practice in an increasingly competitive environment is essential to long-term viability, but not without protecting against internal and external risks. Discuss marketing and social media strategies to increase exposure to target markets, as well as critical risk management practices.

Michael Ripani, CPA, JD, CFE
Senior Counsel, Handler Thayer LLP

Chad Zupke, JD
Director, US Professional Liability Claims, Markel Service, Incorporated
3:45 PM - 5:00 PM

The Future of Work

The pandemic has drastically changed the way organizations prepare and strategize for the future. Today there are broader technology, climate, cultural, social, and economic challenges than ever before. Join Illinois CPA Society President and CEO Todd Shapiro and other top executives as they discuss their unique perspectives and critical insights on the future of work.

Moderator:
Todd Shapiro | President and CEO, Illinois CPA Society

Panel:
Jim Boomer | CEO, Boomer Consulting, Inc.
Steve Latreille | Vice President of Finance, North America, Ingredion Incorporated
Kate Ward, CPA | Partner, Kerber, Eck & Braeckel LLP

KEYNOTE
REGISTER TODAY!
www.icpas.org/summit
By registering to attend this event in person, I agree to abide by each of the COVID-19 safety protocols that are in place for the event. I understand that failure to comply may result in expulsion from the event with no refund. I acknowledge that my in-person attendance is voluntary, and I waive and release ICPAS from any liability arising from the contraction of communicable diseases.

REGISTRATION OPTIONS

1. Date: 8/22  Title: Pre-SUMMIT Virtual Workshops - select session below
   ICPAS M/NM: $215/300  Total: $_________
2. Date: 8/23-24  Title: 2-Day Session Pass
   ICPAS M/NM: $365/$390  Total: $_________

PLEASE SELECT ONE. I will be attending SUMMIT22: □ IN-PERSON  □ VIRTUALLY

TOTAL ENCLOSED: $_________

PERSONAL INFORMATION AND PAYMENT

Member ID#:_____________(if applicable)
First Name:_________________________________________ Last Name:_________________________________________ M#:______
Company:__________________________________________________________________________________________
Title:______________________________________________________________________________________________
Address:________________________________________________________________________________________________________
City:________________________ State:__________________ Zip:________________________
Phone:________________________ Fax:______________________________________________________________________________
Email:_____________________________________________________________________________________________________

METHOD OF PAYMENT: □ Check (Payable to Illinois CPA Society)  □ Visa  □ MasterCard  □ Discover  □ Amex
Card Number:________________________________________ Exp. Date:________________________ CVV:________
Cardholder Name:________________________________________ Signature:________________________________________

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

Code: Time: Title: Field of Study: Credits:

MONDAY, AUGUST 22, 2022

□ 004 10:00AM - 1:00PM  Basic Trusts: Taxation of Trusts and Preparing Form 1041  4 Taxes  4 CPE/3.25 CLE*/4 CFP*/4 EA*

□ 005 10:00AM - 1:00PM  Who’s the Boss: Tax Practitioners Panel  4 Taxes  4 CPE/3.25 CLE*/4 CFP*/4 EA*

TUESDAY, AUGUST 23, 2022

□ 100 8:00AM - 9:15AM  KEYNOTE: The State of the CPA Profession: Being Relevant in the Next Frontier  1.5 Accounting  1.5 CPE

□ 101 9:45AM - 10:30AM  Individual Tax Update: Part 1  1 Taxes  1 CPE/75 CLE*/1 CFP*/1 EA*

□ 102 9:45AM - 10:30AM  SSARS 25: Review Engagements  1 Accounting  1 CPE

□ 103 9:45AM - 10:30AM  Introducing Clients to PFP Services  1 Specialized Knowledge  1 CPE/1 CFP*

□ 104 9:45AM - 10:30AM  Strengthening Finance and Accounting’s Role in Corporate Strategy  1 Business Management & Organization  1 CPE

□ 105 9:45AM - 10:30AM  Digital Transformation and Frictionless Finance  1 Information Technology  1 CPE

□ 106 10:40AM - 11:30AM  Individual Tax Update: Part 2  1 Taxes  1 CPE/75 CLE*/1 CFP*/1 EA*

□ 107 10:40AM - 11:30AM  ESG and Financial Reporting  1 Accounting  1 CPE

□ 108 10:40AM - 11:30AM  Professional Ethics  1 Regulatory Ethics  1 CPE/75 CLE*

□ 109 10:40AM - 11:30AM  Decoding Worker Classification Challenges  1 Personnel/Human Resources  1 CPE

□ 110 10:40AM - 11:30AM  Becoming an Entrepreneurial Accountant  1 Management Services  1 CPE

□ 111 12:25PM - 1:15PM  Business Tax Update: Part 1  1 Taxes  1 CPE/75 CLE*/1 CFP*/1 EA*

□ 112 12:25PM - 1:15PM  Accounting for Contested Trusts and Estates  1 Accounting  1 CPE

□ 113 12:25PM - 1:15PM  Developing and Retaining Diverse Talent  1 Personnel/Human Resources  1 CPE

□ 114 12:25PM - 1:15PM  Building Flexible Models With Microsoft Excel’s New Dynamic Arrays  1 Computer Software & Applications  1 CPE
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<tr>
<th>Title</th>
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<td>Advanced Financial Planning Strategies to Help Clients Retire With Confidence</td>
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**REGISTRATION INFORMATION (PRE-REGISTER TODAY!)**

**Pre-Registration Process:**
- Upon registering for ICPAS SUMMIT22, attendees will receive an email confirmation.
- Starting August 16, 2022, all registered attendees will receive access to the SUMMIT22 Portal.
- All attendees will receive an email the week prior to ICPAS SUMMIT22 that will include helpful hints, tips, and event details.
- In-person attendees will pick up their badge on-site the day of the event at the registration booth.

**WEBSITE:** www.icpas.org/summit
**FAX:** Both pages with credit card information to 312.993.9432
**MAIL:** Both pages with check or credit card information to Illinois CPA Society, Attention Member Services 550 W. Jackson Blvd., Suite 900, Chicago, IL 60661-5742

If you have questions, or changes to your schedule, please call Member Services at 800.993.0407, option 2. No refunds will be given. Substitutions are permitted.
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