In-Person and Virtual Options Available

Register today at **www.icpas.org/summit**

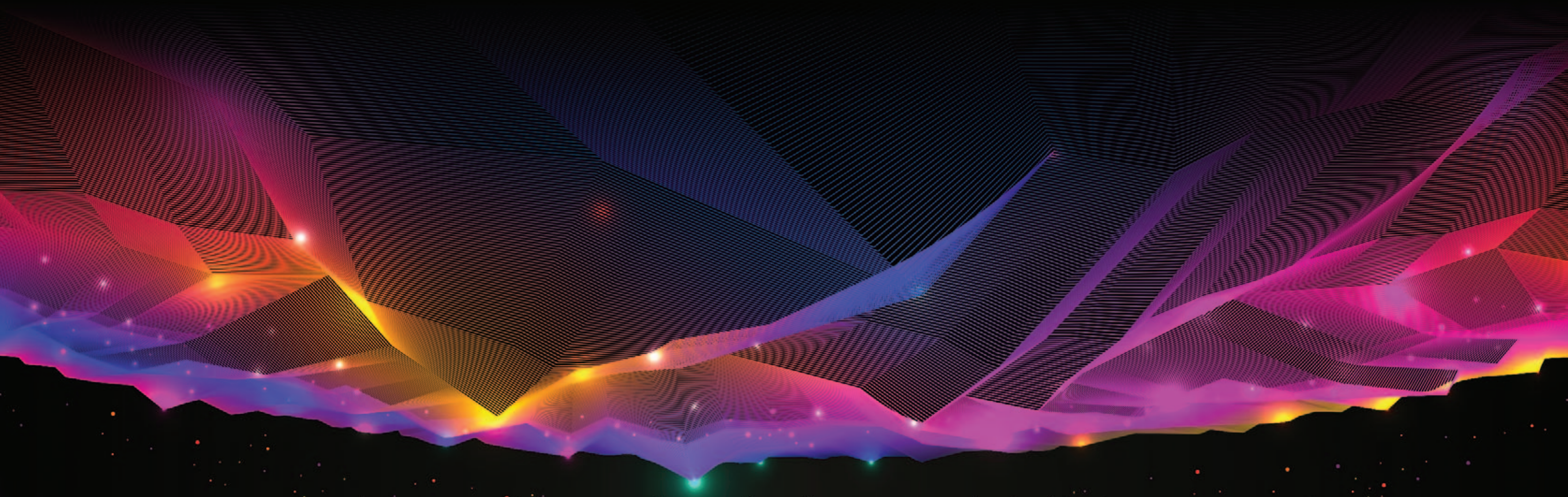
Incredible Value!

16 CPE Hours for ONLY $365*

*members

ICPAS SUMMIT™ 22

The Premier Event for Accounting and Finance Professionals™



THE NEXT FRONTIER

ILLINOIS CPA SOCIETY®

www.icpas.org

Tuesday-Wednesday

August 23-24, 2022

Donald E. Stephens Convention Center

Rosemont, Illinois

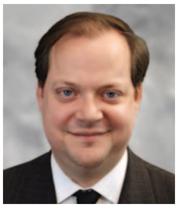
Expert Keynote Speakers:

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

The Economy in Unprecedented Times



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

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

Jim Boomer
CEO, Boomer Consulting, Inc.

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

Kate Ward, CPA
Partner, Kerber, Eck & Braeckel LLP

NEW WORLD | NEW OPPORTUNITIES | NEW VISION

The accounting profession is entering the next frontier of growth, innovation, and transformation.

SUMMIT22 gives you the insights and information you need to shape your future.

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
BKR
blue J
Canopy Tax
CPA Charge
Drake Software
GigTel
goVirtualOffice
IRS Trouble Solvers
KBKG
LeaseQuery
Mango
Mariner Wealth Advisors
Millennium Trust Company
Pavestep
planguru
Robert Half
Safe Send
Saling Simms Associates
Tipalti
Zoho

(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.

ICPAS SUMMIT22™

The Premier Event for Accounting and Finance Professionals℠

DAY ONE AT-A-GLANCE

Tuesday, August 23, 2022

8.23.22	8:00AM - 9:15AM	9:15AM 9:40AM	9:40AM - 10:30AM	10:40AM - 11:30AM	11:30AM 12:25PM	12:25PM - 1:15PM	1:25PM - 2:15PM	2:15PM 2:40PM	2:40PM - 3:30PM	3:45PM - 5:00PM
TRACKS	**KEYNOTE**	**BREAK**	**SESSIONS**	**SESSIONS**	**BREAK**	**SESSIONS**	**SESSIONS**	**BREAK**	**SESSIONS**	**KEYNOTE**
Tax			**Individual Tax Update: Part 1** Code: 101 CLE: .75* CFP: 1* EA: 1*	**Individual Tax Update: Part 2** Code: 106 CLE: .75* CFP: 1* EA: 1*		**Business Tax Update: Part 1** Code: 111 CLE: .75* CFP: 1* EA: 1*	**Business Tax Update: Part 2** Code: 116 CLE: .75* CFP: 1* EA: 1*		**Cryptocurrency: Top 10 Tax Mistakes** Code: 121 CLE: .75* CFP: 1* EA: 1*	
Accounting & Auditing/Government			**SSARS 25: Review Engagements** Code: 102	**ESG and Financial Reporting** Code: 107		**Accounting for Contested Trusts and Estates** Code: 112	**Auditing Update: Part 1** Code: 117		**Auditing Update: Part 2** Code: 122	
Ethics/Personal Development	**The State of the CPA Profession: Being Relevant in the Next Frontier** Mary Fuller, Todd Shapiro **Code:** 100		**Introducing Clients to PFP Services** Code: 103 CFP: 1*	**Professional Ethics** Code: 108 CLE: .75* Ethics: 1		**Developing and Retaining Diverse Talent** Code: 113	**Making Feedback Work** Code: 118		**Creative Thinking and Problem Solving** Code: 123	**Leveraging Technology for Success** Roman Kepczyk **Code:** 126
Corporate Strategy/ Human Capital (Center for Corporate Financial Leadership)			**Strengthening Finance and Accounting's Role in Corporate Strategy** Code: 104	**Decoding Worker Classification Challenges** Code: 109		**Building Flexible Models With Microsoft Excel's New Dynamic Arrays** Code: 114	**Change Management: Practical Solutions** Code: 119		**Corporate Strategy and FP&A** Code: 124	
Technology Solutions/Advisory Services (CPACHARGE)			**Digital Transformation and Frictionless Finance** Code: 105	**Becoming an Entrepreneurial Accountant** Code: 110		**Advanced Financial Planning Strategies to Help Clients Retire With Confidence** Code: 115 CFP: 1*	**Automating Your Accounting and Financial Reporting Processes** Code: 120		**Creating Scalable Advisory Services That Sell** Code: 125	

*Specialty Credits Pending Approval

ICPAS SUMMIT22

The Premier Event for Accounting and Finance Professionals™

DAY TWO AT-A-GLANCE

Wednesday, August 24, 2022

8.24.22	8:00AM - 9:15AM	9:15AM 9:40AM	9:40AM - 10:30AM	10:40AM - 11:30AM	11:30AM 12:25PM	12:25PM - 1:15PM	1:25PM - 2:15PM	2:15PM 2:40PM	2:40PM - 3:30PM	3:45PM - 5:00PM
TRACKS	**KEYNOTE**	**BREAK**	**SESSIONS**	**SESSIONS**	**BREAK**	**SESSIONS**	**SESSIONS**	**BREAK**	**SESSIONS**	**KEYNOTE**
Tax	**The Economy in Unprecedented Times** Derek Sasveld **Code:** 200 **CFP:** 1.5*		**Fun With Succession Planning and Taxes** **Code:** 201 **CLE:** .75* **CFP:** 1* **EA:** 1*	**Multi-State Tax Update** **Code:** 206 **CLE:** .75* **CFP:** 1*		**Virtual Currency Transactions: Successfully Serving Clients** **Code:** 211 **CLE:** .75* **CFP:** 1* **EA:** 1*	**Not-for-Profit Tax Update** **Code:** 216 **CLE:** .75* **CFP:** 1* **EA:** 1*		**Illinois Taxes: Getting It Right!** **Code:** 221 **CLE:** .75* **CFP:** 1*	**The Future of Work** Todd Shapiro Jim Boomer Steve Latrielle Kate Ward **Code:** 226
Accounting & Auditing/Government			**What's Up at FASB in 2022?** **Code:** 202	**Implementing the New Lease Standard: Get Ready** **Code:** 207		**GASB Update** **Code:** 212 **Yellow Book:** 1	**Audit Quality Standards: Proposed Statements on Quality Management** **Code:** 217		**Government and Fraud** **Code:** 222 **Yellow Book:** 1	
Ethics/Personal Development			**Not-for-Profit Corporate Governance: Shaken, Not Stirred** **Code:** 203 **CLE:** .75*	**Be Aware or Beware: Drivers of Large Malpractice Claims** **Code:** 208 **Ethics:** 1 **CLE:** .75*		**Developing and Enhancing Your Technical Skills** **Code:** 213	**Preventing and Investigating Sexual and Other Harassment in a #MeToo and COVID-19 World** **Code:** 218 **SHPT:** 1^		**Developing a Value Creation Mindset** **Code:** 223	
Corporate Strategy/ Human Capital Center for Corporate Financial Leadership			**Accounting Skill Set Shift: Analytics** **Code:** 204	**Mastering Peer-to-Peer Leadership: Keys to Moving Up the Executive Ladder** **Code:** 209		**The Post-COVID Paradox** **Code:** 214	**How to Keep Your Organization From Drowning in the Turnover Tsunami** **Code:** 219		**Employment Discrimination Law Basics** **Code:** 224	
Technology Solutions/Advisory Services CPACHARGE			**Making the Hybrid Work Model Work for You** **Code:** 205	**Emerging Trends in Cybersecurity** **Code:** 210		**Process + Technology = Opportunities** **Code:** 215	**Your Client Wants to Sell? How to Effectively Market Their Business** **Code:** 220		**Enhancing Your Competitiveness While Minimizing Risk** **Code:** 225	

*Specialty Credits Pending Approval | ^Sexual Harassment Prevention Training

Optional Pre-SUMMIT22

Workshops

Monday 8.22.22

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

KEYNOTE

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

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

Concurrent Educational

Sessions

8.23.22

10:40 AM - 11:30 AM

Becoming an Entrepreneurial Accountant

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.

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

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

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

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

KEYNOTE

3:45 PM - 5:00 PM

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

Concurrent Educational

Sessions

8.24.22

Wednesday 8.24.22

KEYNOTE

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

Concurrent Educational

Sessions

8.24.22

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

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

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

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, CPACharge

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.

Concurrent Educational

Sessions

8.24.22

10:40 AM - 11:30 AM

Be Aware or Beware: Drivers of Large Malpractice Claims

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.

Sarah Ference, CPA
Risk Control Director,
CNA Insurance

Deborah Rood, CPA, MST
Risk Control Consulting Director,
CNA Insurance

10:40 AM - 11:30 AM

Mastering Peer-to-Peer Leadership: Keys to Moving Up the Executive Ladder

Discover how to use an influence map to develop healthy, productive working relationships with your peers. Learn to build alignment and alliances that will move key organization-wide priorities forward and elevate your chances for promotion to an executive level.

Jon Lokhorst, CPA, PCC
Executive Leadership Coach,
Lokhorst Consulting LLC

10:40 AM - 11:30 AM

Emerging Trends in Cybersecurity

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.

Sharon Chand, CISSP
Principal, Deloitte

12:25 PM - 1:15 PM

Virtual Currency Transactions: Successfully Serving Clients

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.

Shehan Chandrasekera, CPA
Head of Tax Strategy, CoinTracker

12:25 PM - 1:15 PM

GASB Update

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.

Michael Malatt, CPA
Senior Manager,
Baker Tilly US LLP

12:25 PM - 1:15 PM

Developing and Enhancing Your Technical Skills

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.

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

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

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

Eric Fader, CPA, JD
Senior Counsel,
Duane Morris LLP

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

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

KEYNOTE

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

ICPAS SUMMIT22

The Premier Event for Accounting and Finance Professionals℠

REGISTRATION

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

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

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: ______________________________ MI: _____

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: *Specialty Credits Pending Approval
			MONDAY, AUGUST 22, 2022		
☐	004	1:00PM - 4:30PM	Basic Trusts: Taxation of Trusts and Preparing Form 1041	4 Taxes	4 CPE/3.25 CLE*/4 CFP*/4 EA*
☐	005	1:00PM - 4:30PM	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	9:40AM - 10:30AM	Individual Tax Update: Part 1	1 Taxes	1 CPE/.75 CLE*/1 CFP*/1 EA*
☐	102	9:40AM - 10:30AM	SSARS 25: Review Engagements	1 Accounting	1 CPE
☐	103	9:40AM - 10:30AM	Introducing Clients to PFP Services	1 Specialized Knowledge	1 CPE/1 CFP*
☐	104	9:40AM - 10:30AM	Strengthening Finance and Accounting's Role in Corporate Strategy	1 Business Management & Organization	1 CPE
☐	105	9:40AM - 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

✔	Code:	Time:	Title:	Field of Study:	Credits: *Specialty Credits Pending Approval

TUESDAY, AUGUST 23, 2022 CONTINUED

✔	Code	Time	Title	Field of Study	Credits
☐	115	12:25PM - 1:15PM	Advanced Financial Planning Strategies to Help Clients Retire With Confidence	1 Specialized Knowledge	1 CPE/1 CFP*
☐	116	1:25PM - 2:15PM	Business Tax Update: Part 2	1 Taxes	1 CPE/.75 CLE*/1 CFP*/1 EA*
☐	117	1:25PM - 2:15PM	Auditing Update: Part 1	1 Auditing	1 CPE
☐	118	1:25PM - 2:15PM	Making Feedback Work	1 Communications & Marketing	1 CPE
☐	119	1:25PM - 2:15PM	Change Management: Practical Solutions	1 Business Management & Organization	1 CPE
☐	120	1:25PM - 2:15PM	Automating Your Accounting and Financial Reporting Processes	1 Information Technology	1 CPE
☐	121	2:40PM - 3:30PM	Cryptocurrency: Top 10 Tax Mistakes	.5 Information Technology, .5 Taxes	1 CPE/ .75 CLE*/1 CFP*/1 EA*
☐	122	2:40PM - 3:30PM	Auditing Update: Part Two	1 Auditing	1 CPE
☐	123	2:40PM - 3:30PM	Creative Thinking and Problem Solving	1 Personal Development	1 CPE
☐	124	2:40PM - 3:30PM	Corporate Strategy and FP&A	.5 Business Management & Organization, .5 Finance	1 CPE
☐	125	2:40PM - 3:30PM	Creating Scalable Advisory Services That Sell	1 Management Services	1 CPE
☐	**126**	**3:45PM - 5:00PM**	**KEYNOTE: Leveraging Technology for Success**	**1.5 Information Technology**	**1.5 CPE**

WEDNESDAY, AUGUST 24, 2022

✔	Code	Time	Title	Field of Study	Credits
☐	**200**	**8:00AM - 9:15AM**	**KEYNOTE: The Economy in Unprecedented Times**	**1.5 Economics**	**1.5 CPE/1.5 CFP***
☐	201	9:40AM - 10:30AM	Fun With Succession Planning and Taxes	1 Taxes	1 CPE/.75 CLE*/1 CFP*/1 EA*
☐	202	9:40AM - 10:30AM	What's Up at FASB in 2022?	1 Accounting	1 CPE
☐	203	9:40AM - 10:30AM	Not-for-Profit Corporate Governance: Shaken, Not Stirred	1 Business Management & Organization	1 CPE/.75 CLE*
☐	204	9:40AM - 10:30AM	Accounting Skill Set Shift: Analytics	1 Personal Development	1 CPE
☐	205	9:40AM - 10:30AM	Making the Hybrid Work Model Work for You	1 Information Technology	1 CPE
☐	206	10:40AM - 11:30AM	Multi-State Tax Update	1 Taxes	1 CPE/.75 CLE*/1 CFP*
☐	207	10:40AM - 11:30AM	Implementing the New Lease Standard: Get Ready	1 Accounting	1 CPE
☐	208	10:40AM - 11:30AM	Be Aware or Beware: Drivers of Large Malpractice Claims	1 Regulatory Ethics	1 CPE/.75 CLE*
☐	209	10:40AM - 11:30AM	Mastering Peer-to-Peer Leadership: Keys to Moving Up the Executive Ladder	1 Personal Development	1 CPE
☐	210	10:40AM - 11:30AM	Emerging Trends in Cybersecurity	1 Information Technology	1 CPE
☐	211	12:25PM - 1:15PM	Virtual Currency Transactions: Successfully Serving Clients	1 Taxes	1 CPE/.75 CLE*/1 CFP*/1 EA*
☐	212	12:25PM - 1:15PM	GASB Update	1 Accounting (Government/Yellow Book)	1 CPE
☐	213	12:25PM - 1:15PM	Developing and Enhancing Your Technical Skills	1 Personal Development	1 CPE
☐	214	12:25PM - 1:15PM	The Post-COVID Paradox	1 Personnel/Human Resources	1 CPE
☐	215	12:25PM - 1:15PM	Process + Technology = Opportunities	.5 Information Technology .5 Business Management & Organization	1 CPE
☐	216	1:25PM - 2:15PM	Not-for-Profit Tax Update	1 Taxes	1 CPE/.75 CLE*/1 CFP*/1 EA*
☐	217	1:25PM - 2:15PM	Audit Quality Standards: Proposed Statements on Quality Management	1 Auditing	1 CPE
☐	218	1:25PM - 2:15PM	Preventing and Investigating Sexual and Other Harassment in a #MeToo and COVID-19 World	1 Personal Development, 1 SHPT	1 CPE
☐	219	1:25PM - 2:15PM	How to Keep Your Organization From Drowning in the Turnover Tsunami	1 Personnel/Human Resources	1 CPE
☐	220	1:25PM - 2:15PM	Your Client Wants to Sell? How to Effectively Market Their Business	1 Business Management & Organization	1 CPE
☐	221	2:40PM - 3:30PM	Illinois Taxes: Getting It Right!	1 Taxes	1 CPE/.75 CLE*/1 CFP*
☐	222	2:40PM - 3:30PM	Government and Fraud	1 Auditing (Government/Yellow Book)	1 CPE
☐	223	2:40PM - 3:30PM	Developing a Value Creation Mindset	1 Personal Development	1 CPE
☐	224	2:40PM - 3:30PM	Employment Discrimination Law Basics	1 Business Law	1 CPE
☐	225	2:40PM - 3:30PM	Enhancing Your Competitiveness While Minimizing Risk	1 Management Services	1 CPE
☐	**226**	**3:45PM - 5:00PM**	**KEYNOTE: The Future of Work**	**.5 Business Management & Organization, 1 Personnel/HR**	**1.5 CPE**

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.

ILLINOIS CPA SOCIETY®

550 W. Jackson, Suite 900
Chicago, IL 60661-5742

August 23-24, 2022
Donald E. Stephens Convention Center, Rosemont, Illinois

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

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

THANK YOU TO OUR ICPAS SUMMIT22 EXHIBITORS AND SPONSORS:

CPACHARGE
AN AFFINIPAY SOLUTION

Platinum Elite and Technology Track Sponsor

abgi part of visiativ
BKR International
blue J
canopy
Center for Corporate Financial Leadership
Drake Software Professional Tax Solutions
GigTel
goVirtualOffice ERP Simplified.
IRS Problems
KBKG
LeaseQuery Complex Accounting Simplified
mango Practice Management
Mariner Wealth Advisors
Millennium Trust Company®
Pavestep Develop and retain your talent
planguru®
Robert Half®
SafeSend
Saling Simms Associates An Independent Registered Investment Advisor
tipalti
ZOHO