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Running a Business in a Chaotic Environment



Dorri McWhorter, CPA, CGMA, CIA, MBA President and CEO, YMCA of Metropolitan Chicago

Techs, Trends, and Disruptors



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

All Eyes on the Economy



Derek Sasveld, CFA Director, Investment Strategy and Research, Busey Wealth Management

The State of the CPA Profession: Embracing the Possibilities



Geoffrey Brown, CAE President and CEO, Illinois CPA Society



Jonathan Hauser, CPA Chairperson, Illinois CPA Society and Partner, KPMG

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What People Are Saying

"Extremely informative and timely."

"The SUMMIT is an excellent source for quality CPE."

"Great event as usual with quality, knowledgeable speakers."

"Really great event. Looking forward to attending again."

"I enjoy this event and like the flexibility of having a virtual option."

"Great online platform. Overall seamless virtual experience!"

"The sessions were helpful and had a good variety of topics."

PLEASE NOTE:

All program information is subject to change. Please verify upon registration.

- Some of the SUMMIT23 speakers may be presenting remotely for both the in-person and virtual venues.
- Remote speakers are noted with the following symbol (3)
- For the latest speaker updates, visit www.icpas.org/summit

DAY ONE AT-A-GLANCE Tuesday, August 22, 2023

De **Sourte and Finance Professionals**"

	3:45 ^m - 5:00 ^{pm}	KEYNOTE	Techs, Trends, and Disruptors Roman Kepczyk Code: 121			
	2:40 ^{PM} - 3:30 ^{PM}	SESSIONS	Introduction to Cost Segregation and the Impacts on Tax Reform Code: 117 CLE: 75 CFP: 1 EA: 1 Session Sporsor KBKG	Tax Ethics: Circular 230 Code: 118 Ethics: 1 EA: 1	SOC Engagements and Reporting Code: 119	Striking the Balance Between Digital Security and Usability Code: †20
	2:15 ^{PM} 2:40 ^{PM}	BREAK				
	1:25 ^m - 2:15 ^m	SESSIONS	The Who, What, and Why of Roth IRAs and Roth Conversions Code: 113 CLE: 75 CFP: 1 EA: 1	Breaking Barriers: Supporting Diverse Talent in Your Workplace Code: 114	What's Up With FASB in 2023? Code: 115	Technology Adoption and Workplace Culture Code: 116
	12:25 ^{PM} - 1:15 ^{PM}	SESSIONS	Protecting Your Tax-Exempt Organization Code: 109 CLE: 75 CFP: 1 EA: 1	Leading Up: The Superpower Every Ascending Leader Needs Code: 110	Get Ready for CECL: Private Entities and Not-for-Profits Adoption Code: 111	Budgeting vs. Forecasting Code: 112 CFP: 1
	11:30 ^{AM} 12:25 ^{PM}	BREAK				
	10:40 ^{am} - 11:30 ^{am}	SESSIONS	International Tax Update Code: 105 CLE: 75 CFP: 1 EA: 1	Corporate Governance: Ensuring Sufficient Supervision Code: 106 CLE: .75	Delivering Sustainable Assurance Code: 107	Ignite Your Client Engagement Strategy Code: 108
THE LEMINEL EVENTION ACCOUNTING AND FILIANCE FLORESSONALS	9;40 ^{4M} - 10;30 ^{4M}	SESSIONS	State Taxes: Ethical Dilemmas and Managing Risks Code: 101 CLE: 75 CFP: 1	Becoming an Ethical Leader to Drive Crucial Business Results Code: 102 Ethics: 1	Accounting and Auditing Issues of Digital Assets Code: 103	Growing Through FP&A Evolution Code: 104 CFP: 1
	9:15 ^{AM} 9:40 ^{AM}	BREAK				
	8:00 ^{AM} - 9:15 ^{AM}	KEYNOTE		Running a Business in a Chaotic Erwironment	Dorri McWhorter Code: 100	
-	8.22.23	TRACKS	Тах	Personal Development/Ethics	Accounting and Auditing	Corporate Finance/Technology



DAY TWO AT-A-GLANCE Wednesday, August 23, 2023

3:45° ^m - 5:00° ^m	KEYNOTE		State of the CPA Profession: Embracing the Possibilities	Geof Brown Jonathan Hauser Code: 221	
2:40 ^{pm} - 3:30 ^{pm}	SESSIONS	Entity Selection for Taxes (PLUS!) Code: 217 CLE: 75 CFP: 1 EA: 1	Sexual Harassment Prevention: Policies, Systems, and Training Code: 28 SHPT: 1	Quality Management Standards: Staying Compliant Code: 219	Future-Proof Your Firm: Metrics That Matter Code: 220 Sessin Sporter: Procetice
2:15 ^{PM} 2:40 ^{PM}	BREAK				
1:25°M - 2:15°M	SESSIONS	Avoiding Pitfalls: Managing Sales Tax in Multi-State Situations Code: 213 CLE: 75 CFP: 1 Session Sporeor: taxconnex	Collaboration Equity in a Hybrid Workplace Code: 214	Private Equity Group Ownership: Accounting, Implementation, and Execution Code: 215	Controller to CFO: Evolving Responsibilitties Code: 216
12:25 ^{PM} - 1:15 ^{PM}	SESSIONS	Considerations for the Accountant With Elderly Clients Code: 209	Presenting Like a Pro Code: 210	Audit Update: Changes Are Here Code: 211	Help! Is Your Client's Company Worthless? Code: 212 CFP: 1
11:30 ^{AM} 12:25 ^{PM}	BREAK				
10:40 ^{am} - 11:30 ^{am}	SESSIONS	Business Tax Update Code: 205 CLE: 75 CFP: 1 EA: 1	Non-Competes and Non-Solicits in a Changing Labor Market Code: 206 CLE: 75	SEC Regulatory Update Code: 207	Enabling Cloud-Based Solutions Code: 208
9:40 ^{nm} - 10:30 ^{nm}	SESSIONS	Individual Tax Update Code: 201 CLE: 75 GFP: 1 EA: 1	Enhancing Leadership at All Levels Code: 202	Distinguishing and Accounting for Debt and Equity Instruments Code: 203	Finance Automation: Improving Processes for a Successful Journey Code: 204
9:15 ^{AM} 9:40 ^{AM}	BREAK				
8:00 ^{4M} - 9:15 ^{4M}	KEYNOTE		All Eyes on the Economy	Derek Sasveld Code: 200 CFP: 1.5	
8.23.23	TRACKS	Тах	Personal Development/Ethics	Accounting and Auditing	Corporate Finance/Technology

Optional Pre-SUMMIT23



Monday 8.21.23 Pre-Conference Workshops are only offered VIRTUALLY.

8.21.23 | 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

8.21.23 | 1:00 PM - 4:30 PM | CONCURRENT WORKSHOP II IRS Exams, Appeals, and Audits: What You Need to Know

Learn the ins and outs of navigating IRS resolution services in audits, collections, and appeals through real-life case studies. Discover best practices for assisting clients with IRS notices, audits, liens and levies, and more.

Mark Heroux, JD | Partner, Baker Tilly US LLP Phillip Levsky, CPA | Senior Manager – Tax, FGMK LLC Luis Plascencia, CPA, MST | Principal, Luis V Plascencia, CPA

Register today!

These workshops will sell out quickly.

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

KEYNOTE

Sessions

Tuesday 8.22.23

8.22.23 | 8:00 AM - 9:15 AM

Running a Business in a Chaotic Environment

Change is constant. Whether the catalyst is COVID, a hybrid workforce, economic issues, or global conflicts, how we choose to show up and meet these changes matters. Hear how, in the midst of chaos, there are always possibilities for creating new business opportunities for those willing to look for them.

Dorri McWhorter, CPA, CGMA, CIA, MBA President and CEO, YMCA of Metropolitan Chicago

8.22.23 | 9:40 AM - 10:30 AM State Taxes: Ethical Dilemmas and Managing Risks

State tax compliance is a lot like driving: What's the speed limit? Will I get pulled over? What are the potential fines and penalties? Except with state taxes, the law isn't always clear. Discuss professional liability and ethical considerations and receive tips to help mitigate these risks.

Eric Fader, JD, CPA Attorney, Duane Morris LLP

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

8.22.23 | 9:40 AM - 10:30 AM

Becoming an Ethical Leader to Drive Crucial Business Results

Explore six research-based ethical perspectives to shape your foundation for ethical behavior. Discover the underlying principles, beliefs, and values that influence decision-making when ethical issues are present. Apply these principles to real business situations and learn how being an ethical leader is more challenging (and important) than you think.

Jon Lokhorst, CPA, CSP, PCC

Executive Leadership Coach, Lokhorst Consulting LLC

8.22.23 | 9:40 AM - 10:30 AM Accounting and Auditing Issues of Digital Assets

A day doesn't pass without hearing about cryptocurrency in the news. Learn how to account for investments in, or transactions involving, digital assets, such as bitcoin, under U.S. GAAP. Plus, understand the specific audit implications and challenges that exist.

Leah Donti, CPA, MBA

Founder and President, Advantage Montreal Seminars Inc.

8.22.23 | 9:40 AM - 10:30 AM

Growing Through FP&A Evolution

FP&A and CFO advisory services are high-demand, high-margin, and high-value services to companies and clients alike. Learn about the dynamics of this market and discover the opportunities for growth from a seasoned practice owner.

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

8.22.23 | 10:40 AM - 11:30 AM International Tax Update

Every state, city, and local tax jurisdiction has different rules for foreign businesses generating income from U.S. sources. Hear how to avoid potential tax traps and stay compliant. Plus, discover the intricacies of foreign pension plans when foreign nationals come to the U.S. to work and participate in a retirement plan here, as well as the different ramifications when retirement occurs state side versus abroad.

Amy Chamoun, CPA, MST Partner, PKF Mueller

Roger Yule, CPA Senior Tax Manager, Stapleton Group LLC

8.22.23 | 10:40 AM - 11:30 AM

Corporate Governance: Ensuring Sufficient Supervision

Dispersed staff have caused not-for-profits to disperse authority over issues affecting governance. Review the common areas that may not be receiving sufficient supervision, including bylaws requirements, state law issues, antitrust traps, contracting authority, corporate sponsorship, endorsement issues, and other tax and liability exposure areas.

Paula Goedert, JD Partner, Barnes & Thornburg LLP

8.22.23 | 10:40 AM - 11:30 AM Delivering Sustainable Assurance

The world of sustainable information is expanding. Are you prepared to provide the assurance services to meet this emerging demand? Explore the process for providing sustainability assurance and how to differentiate between the criteria used.

Elizabeth Sloan, CPA, MAS

Managing Director, Grant Thornton LLP

8.22.23 | 10:40 AM - 11:30 AM Ignite Your Client Engagement Strategy

The shift to a digital-first business has sparked new ways of interacting with clients. Learn how to win and keep more clients using a new hybrid approach to client engagement. Understand the customer journey and how to effectively connect with clients to develop an actionable sales process to sell and close deals strategically.

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

8.22.23 | 12:25 PM - 1:15 PM Protecting Your Tax-Exempt Organization

The IRS continues to increase its enforcement efforts on the tax-exempt sector. 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. Hear examples of Employee Retention Credit fraud and how to avoid scams.

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

Monica Funk, CPA, MBA Manager, RSM US LLP

8.22.23 | 12:25 PM - 1:15 PM

Leading Up: The Superpower Every Ascending Leader Needs

Learn the skills and tactics needed to develop an effective working relationship with your boss and other superiors. Gain the credibility and support necessary to get things done and advance professionally.

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

8.22.23 | 12:25 PM - 1:15 PM

Get Ready for CECL: Private Entities and Not-for-Profits Adoption

The new Current Expected Credit Losses (CECL) standard is the next big FASB standard going live this year for private companies and not-for-profits. Review the ins and outs of firsttime adoption and transition issues. Plus, discuss the notable impacts on trade account receivables.

Leah Donti, CPA, MBA

Founder & President, Advantage Montreal Seminars Inc.

Sessions



8.22.23 | 1:25 PM - 2:15 PM What's Up With FASB in 2023?

The amount of change in the accounting profession is overwhelming, making it tough for CPAs to keep up. Receive a high-level update on Accounting Standards Updates issued by the FASB that are going live this year for both public and private companies.

Leah Donti, CPA, MBA

Founder & President, Advantage Montreal Seminars Inc.

8.22.23 | 1:25 PM - 2:15 PM

Technology Adoption and Workplace Culture

Successful technology adoption requires a clear understanding of both the organization's culture and the needs of the intended users. Learn how to effectively introduce IT changes to ensure quick and smooth integrations.

LeeJay Stewart

CEO/Managing Director, StratusComm Managed IT Services

8.22.23 | 2:40 PM - 3:30 PM Introduction to Cost Segregation and the Impacts on Tax Reform



Learn the ins and outs of cost segregation, how taxpayers benefit from it, and how it has changed over the years. Review depreciation rules and understand how a cost segregation study is performed. Plus, identify opportunities to immediately deduct abandoned building components, avoid capture tax, and expense demolition costs.

Lester Cook, CCSP Principal, KBKG

8.22.23 | 2:40 PM - 3:30 PM

Tax Ethics: Circular 230

Take a deep dive into IRS Circular 230 to understand your due diligence and ethical compliance responsibilities as a tax preparer. Plus, learn how to avoid preparer penalties.

Michael Singer, CPA

President, Michael J. Singer and Company PC

8.22.23 | 12:25 PM - 1:15 PM Budgeting vs. Forecasting

While budgeting serves as a roadmap for resource allocation and goal setting, forecasting is critical for agile planning and decision-making. Learn how rolling forecasts can help predict future financial outcomes in real time and discover dynamic modeling techniques that can update data in minutes and roll forecasts instantaneously.

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

8.22.23 | 1:25 PM - 2:15 PM

The Who, What, and Why of Roth IRAs and Roth Conversions

Roth IRAs and Roth conversions have the potential to save taxpayers and their heirs a lot of money. Discuss the factors to consider, including timing and estate consequences of conversions.

Elizabeth Buffardi, CPA, CFP

Owner, Crescendo Financial Planners

8.22.23 | 1:25 PM - 2:15 PM

Breaking Barriers: Supporting Diverse Talent in Your Workplace

Learn practical strategies for creating an inclusive work environment based on the experiences of our panelists. Their insights will equip you to identify barriers that limit career advancement for diverse talent and will inspire you to create positive change that empowers others to succeed in your organization.

Moderator: Kari Natale, CAE

Vice President, Strategy and Governance, Illinois CPA Society, and Vice President, CPA Endowment Fund of Illinois

Panelists:

LaToya McKinney, CPA, MSAA Senior Business Process & Control Analyst, Abbott

Sergio Rodriguez, CPA

Senior Manager, Global Employer Services, Deloitte LLP

Sessions

8.22.23 | 2:40 PM - 3:30 PM SOC Engagements and Reporting

The demand for SOC engagements continues to grow and user needs are evolving. Discuss the different types of engagements, hear best practices in planning and executing them, and review key highlights from the AICPA's refreshed guide on SOC 2 engagements.

Laura Cronkhite, CPA, CISA Partner, Crowe LLP

Arpit Parikh, CISA

IT Assurance Senior Manager, Crowe LLP

8.22.23 | 2:40 PM - 3:30 PM Striking the Balance Between Digital Security and Usability

Cloud-based storage, collaboration tools, mobile devices, and social media platforms can increase efficiency and productivity, but they also come with several security risks. Learn best practices on how to maximize technological benefits while minimizing your potential exposure.

LeeJay Stewart

CEO/Managing Director, StratusComm Managed IT Services

8.22.23 | 3:45 PM - 5:00 PM

Techs, Trends, and Disruptors

Dive into today's key technology innovations, trends, and disruptors that are shaping the landscape. Receive specific recommendations for tech equipment that should (and shouldn't) be in your office and review the cybersecurity moves you need to make now to protect your organization. Plus, discuss the latest CPA firm "tech stack" applications that are transforming accounting production processes and expanding advisory reach.

Roman Kepczyk, CPA, CITP, CGMA, LSS BB

Director of Firm Technology Strategy, Right Networks

Wednesday

8.23.23 | 8:00 AM - 9:15 AM

All Eyes on the Economy

Economists, investors, and consumers have expected the U.S. economy to descend into recession since late 2021 as housing and manufacturing have been under great stress. But why has this prediction been so popular yet so far unfulfilled? Discuss the likelihood of a recession, how the different parts of the economy could be affected, how severe it could be, and what an economic recovery might look like.

Derek Sasveld, CFA

Director, Investment Strategy and Research, Busey Wealth Management

KEYNOTE



Sessions

8.23.23 | 9:40 AM - 10:30 AM Individual Tax Update

While the pace of legislative changes may have slowed in comparison to recent years, there's no shortage of other developments and planning ideas to track and consider. Participate in a practical and timely discussion on key issues affecting individuals in 2023 and beyond.

Damien Martin, CPA

Partner, Ernst & Young LLP

8.23.23 | 9:40 AM - 10:30 AM

Enhancing Leadership at All Levels

Whether you're focused on your next career step or creating a development-focused organization, building leadership capabilities is key. Understand the difference between managing and leading, how to identify true talent, and the key leadership attributes regardless of industry or experience level.

Matt Booth, CPA, MBA Retired Partner, PwC

8.23.23 | 9:40 AM - 10:30 AM Distinguishing and Accounting for Debt and Equity Instruments

Discover key questions and considerations that must be evaluated when accounting for the issuance of debt and equity instruments, including determining whether an equity-related instrument or feature should be recorded as a liability under ASC Topic 480 or equity under ASC Topic 815.

Adam Ivezich, CPA Director, FORVIS LLP

8.23.23 | 9:40 AM - 10:30 AM Finance Automation: Improving Processes

for a Successful Journey

The accounting and finance function has always been an ideal candidate for Al-powered automation due to the nature of repetitive, data-intensive processing. Review the leading technologies available in today's market and see how they function in real-life practice.

Rob Drover, MBA

Vice President - Business Solutions, Marcum Technology LLC

8.23.23 | 10:40 AM - 11:30 AM Business Tax Update

Break down all the pertinent tax updates impacting businesses today while preparing for what potentially lies ahead.

Damien Martin, CPA Partner, Ernst & Young LLP

8.23.23 | 10:40 AM - 11:30 AM

Non-Competes and Non-Solicits in a Changing Labor Market

Understand employer limitations and risks under the amended Illinois Freedom to Work Act and receive practical tips for legal compliance and risk avoidance. Plus, hear what to do now to prepare for a potential federal ban on employee non-competes.

Lori Goldstein, JD

Employment Attorney, Law Office of Lori A. Goldstein LLC

8.23.23 | 10:40 AM - 11:30 AM SEC Regulatory Update ©

Discuss recent SEC activity including proposed and final rules, as well as staff guidance impacting external financial reporting. Review updated compliance and disclosure interpretations and discuss SEC comment letter trends from the Division of Corporate Finance.

Meghan Depp, CPA

Professional Practice Partner - SEC Services, BDO USA LLP

Rebecca Freeman, MA

Professional Practice Senior Manager – SEC Services, BDO USA LLP

8.23.23 | 10:40 AM - 11:30 AM

Enabling Cloud-Based Solutions

Cloud-based systems enable companies to adapt to changing business models, both strategically and operationally. Hear how working in the cloud can reduce complexity, increase reliability, enable faster development processes, decrease risk, and realize cost savings.

Ranga Bodla

Vice President - Industry Marketing, Oracle NetSuite

Sessions

8.23.23 | 12:25 PM - 1:15 PM Considerations for the Accountant With Elderly Clients

As a client ages, estate, trust, and financial planning protections often become more important. Learn to recognize signs that potential undue influence or diminished capacity may be taking place and understand the Illinois laws that can help protect aging clients.

Michael Ripani, CPA, JD, CFE

Senior Counsel, Handler Thayer LLP

8.23.23 | 12:25 PM - 1:15 PM

Presenting Like a Pro

Discover how to avoid common presentation pitfalls and confidently present like a pro. Learn tips and techniques to create presentations that are highly engaging, grab your audience's attention, and move them to action.

John Sanchez Managing Director, The FPA Group

8.23.23 | 12:25 PM - 1:15 PM

Audit Update: Changes Are Here

The Statement on Auditing Standards (SAS) delivers a suite of changes that have gone or will go into effect this year. Discuss the key components of SAS Nos. 142-147, as well as other changes to current auditing standards.

Stephanie Ballard, CPA

Senior Manager, Crowe LLP

Zach Lambert, CPA Financial Services Audit Senior Manager, Crowe LLP

8.23.23 | 12:25 PM - 1:15 PM

Help! Is Your Client's Company Worthless?

Learn how to increase a company's value before a sale and calculate the most probable selling price, or determine if your client's company isn't worth selling.

Jamar Cobb-Dennard, JD

Business Broker, Indiana Business Advisors

8.23.23 | 1:25 PM - 2:15 PM Avoiding Pitfalls: Managing Sales Tax in Multi-State Situations



Navigate common compliance pitfalls and receive tips to manage and mitigate your sales tax risk. Discuss economic nexus, the taxability of products and services, the impact of multi-channel selling, filing requirements, and mitigating prior period exposure.

Brian Greer

Partner and Chief Revenue Officer, TaxConnex

8.23.23 | 1:25 PM - 2:15 PM

Collaboration Equity in a Hybrid Workplace

Hear how early lessons learned can help shape the hybrid workplace of tomorrow. Discuss three ideas for hybrid equity, understand the four kinds of hybrid workers, and dissect three trends that will help you foster a more collaborative hybrid workplace.

Michael Gregory, BS, MS, MBA

Founder, Michael Gregory Consulting LLC

8.23.23 | 1:25 PM - 2:15 PM

Private Equity Group Ownership: Accounting, Implementation, and Execution

Walk through the lifecycle of private equity group ownership through the lens of the operating company. Discuss key accounting considerations and compare and contrast the private equity requirements to public and non-public ownership.

Jennifer Dzierzak, CPA, MBA Partner, Crowe LLP

8.23.23 | 1:25 PM - 2:15 PM

Controller to CFO: Evolving Responsibilities

Controller and CFO responsibilities have vastly evolved in recent years. Discover how to address today's pressing priorities, including improving team skills, supporting corporate strategy and decision-making, analyzing business performance, and using technology to increase efficiency and accelerate growth.

Tom Kelly

Director of Product Management, Oracle NetSuite



8.23.23 | 2:40 PM - 3:30 PM Entity Selection for Taxes (PLUS!)

Understand the application and tax implications of the various business entity structures. Discuss the specifics of what the IRS looks for in income tax return filings, as well as the potential asset protection benefits of each kind of entity.

Ben Golden, EA

CEO/Owner, IRS Trouble Solvers LLC

8.23.23 | 2:40 PM - 3:30 PM

Sexual Harassment Prevention: Policies, Systems, and Training

Discover how to develop a comprehensive sexual harassment policy and what leadership needs to do to stay accountable. Learn what an accessible harassment complaint system should entail and what constitutes effective harassment prevention training.

Michael Gregory, BS, MS, MBA

Founder, Michael Gregory Consulting LLC

8.23.23 | 2:40 PM - 3:30 PM Quality Management Standards: Staying Compliant

Quality management standards are evolving on a global level and firms of all sizes performing audit and attestation services may be faced with multiple new systems. Explore the various implementation activities, ongoing monitoring, and evaluation requirements needed to execute a comprehensive evaluation for firm leadership sign-off.

Marcy Johnson, CPA Managing Director, Grant Thornton LLP

8.23.23 | 2:40 PM - 3:30 PM Future-Proof Your Firm: Metrics That Matter



Identify the metrics that matter and discover how to measure them effectively. Learn how to leverage automation, human capital, brand capital, and financial capital to improve visibility and efficiency in your firm.

Dirk Shimpach, CPA Founder, PracticeERP

KEYNOTE

8.23.23 | 3:45 PM - 5:00 PM The State of the CPA Profession: Embracing the Possibilities

It's no secret that the accounting profession faces challenges. Issues like diversity, equity, and inclusion; meeting the ever-changing expectations and demands of the companies, clients, and communities we serve; and stewarding the next generation of CPAs necessitate action. But these challenges also present possibilities—possibilities for fresh ideas and new approaches to help navigate the future, ensure our relevance, and keep the profession moving forward.

Geoffrey Brown, CAE | President and CEO, Illinois CPA Society Jonathan Hauser, CPA | Chairperson, Illinois CPA Society and Partner, KPMG



REGISTRATION

Date: Title: ICPAS M/MRI Total: 8/21 Per-SLAMMI Virbal Workshops - select session below \$225;070 \$					REGISTRATION OPTI	ONS	
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19 240 ^w - 3.30 ^w SOC Engagements and Reporting Auditing 1CPE 20 240 ^w - 3.30 ^w Striking the Balance Between Digital Security and Usability Information Technology 1CPE 121 345 ^w - 5.00 ^w Keynote: Techs, Trends, and Disruptors Information Technology 1.5 CPE WEDNESDAY, AUGUST 23, 2023 200 8.00 ^{wu} - 9.15 ^{wu} Keynote: All Eyes on the Economy Economics 1.5 CPE/15 CFP 201 9.40 ^{wu} - 10.30 ^{wu} Enhancing Leadership at All Levels Personal Development 1CPE/75 OLE/1 CPP/1E/ 202 9.40 ^{wu} - 10.30 ^{wu} Enhancing Leadership at All Levels Personal Development 1CPE 204 9.40 ^{wu} - 10.30 ^{wu} Enhancing Leadership at All Levels Res 1CPE/75 OLE/1 CPP/1E/ 205 10.40 ^{wu} - 11.30 ^{wu} Business Tax Update Taxes 1CPE/75 OLE/1 CPP/1E/ 205 10.40 ^{wu} - 11.30 ^{wu} Business Tax Update @ Accounting 1CPE/75 OLE/1 CPP/1E/ 206 10.40 ^{wu} - 11.30 ^{wu} Sec Regulatory Update @ Accounting 1CPE/75 OLE/1 CPP/1E/ 208 10.40 ^{wu} - 11.30 ^{wu} Sec Regulatory Update @ Accounting 1CPE/75 OLE/1 CPP/1E/ </td <td></td> <td>117</td> <td>2:40^{PM} - 3:30^{PM}</td> <td>Introduction to Cost Segregation and the Impacts on Tax Reform</td> <td>Taxes</td> <td>1 CPE/.75 CLE/1 CFP/1 EA</td>		117	2:40 ^{PM} - 3:30 ^{PM}	Introduction to Cost Segregation and the Impacts on Tax Reform	Taxes	1 CPE/.75 CLE/1 CFP/1 EA
120 240 ^{-w1} - 330 ^{w1} Striking the Balance Between Digital Security and Usability Information Technology 1 CPE 121 345 ^{w1} - 500 ^{w1} Keynote: Techs, Trends, and Disruptors Information Technology 1.5 CPE WEDNESDAY, AUGUST 23, 2023 200 8:00 ^{w1} - 9:15 ^{w1} Keynote: All Eyes on the Economy Economics 1.5 CPE/15 CPP 201 9:40 ^{w1} - 1030 ^{w1} Individual Tax Update Taxes 1 CPE/75 CLE/1 CPP/1 E/ 202 9:40 ^{w1} - 1030 ^{w1} Individual Tax Update Taxes 1 CPE 203 9:40 ^{w1} - 1030 ^{w1} Individual Tax Update Personal Development 1 CPE 204 9:40 ^{w1} - 1030 ^{w1} Enhancing Leadership at All Levels Personal Development 1 CPE 205 10:40 ^{w1} - 1130 ^{w1} Business Tax Update Taxes 1 CPE/75 CLE/1 CPP/1 E/ 206 10:40 ^{w1} - 1130 ^{w1} Non-Competes and Non-Solicits in a Changing Labor Market Business Law 1 CPE/75 CLE/1 CPP/1 E/ 208 10:40 ^{w1} - 1130 ^{w1} Enabling Cloud-Based Solutions Information Technology 1 CPE 219 12:25 ^{w1} - 115 ^{w1} Considerations For The Accountrant With Edetry Clients Specialized Knowledg		118	2:40 ^{pm} - 3:30 ^{pm}	Tax Ethics: Circular 230	Regulatory Ethics	1 CPE/1 Ethics/1 EA
121 3:45 ^m - 5:00 ^m Keynote: Techs, Trends, and Disruptors Information Technology 15 CPE 200 8:00 ^m - 9:15 ^m Keynote: All Eyes on the Economy Economics 15 CPE/15 CFP 201 9:40 ^m - 10:30 ^m Individual Tax Update Taxes 1 CPE/75 CLE/1 CFP/1E/ 202 9:40 ^m - 10:30 ^m Enhancing Leadership at All Leveis Personal Development 1 CPE/ 203 9:40 ^m - 10:30 ^m Distinguishing and Accounting for Debt and Equily Instruments Accounting 1 CPE/ 204 9:40 ^m - 10:30 ^m Enhancing Leadership at All Leveis Personal Development 1 CPE/ 204 9:40 ^m - 10:30 ^m Enhancing Leadership at All Leveis Accounting 1 CPE/ 204 9:40 ^m - 10:30 ^m Enhancing Leadership at All Leveis Accounting 1 CPE/ 205 10:40 ^m - 11:30 ^m Business Tax Update Taxes 1 CPE// TS CLE / CPP/1 E/ 206 10:40 ^m - 11:30 ^m Non-Competes and Non-Solicits in a Changing Labor Market Business Law 1 CPE// TS CLE / CPP/1 E/ 207 10:40 ^m - 11:30 ^m SEC Regulatory Update o Accounting </td <td></td> <td>119</td> <td>2:40^{pm} - 3:30^{pm}</td> <td>SOC Engagements and Reporting</td> <td>Auditing</td> <td>1 CPE</td>		119	2:40 ^{pm} - 3:30 ^{pm}	SOC Engagements and Reporting	Auditing	1 CPE
WEDNESDAY, AUGUST 23, 2023 200 8:00 ^m - 9:15 ^m Keynote: All Eyes on the Economy Economics 15 CPE/15 CP 201 9:40 ^m - 10:30 ^m Individual Tax Update Taxes 1 CPE/75 CLE/1 CPP/1 E/ 202 9:40 ^m - 10:30 ^m Enhancing Leadership at All Levels Personal Development 1 CPE 203 9:40 ^m - 10:30 ^m Distinguishing and Accounting for Debt and Equity Instruments Accounting 1 CPE 204 9:40 ^m - 10:30 ^m Finance Automation: Improving Processes for a Successful Journey Information Technology 1 CPE 205 10:40 ^m - 11:30 ^m Business Tax Update Taxes 1 CPE/75 CLE/1 CPP/1 E/ 206 10:40 ^m - 11:30 ^m Non-Competes and Non-Solicits in a Changing Labor Market Business Law 1 CPE/75 CLE 207 10:40 ^m - 11:30 ^m SEC Regulatory Update Ø Accounting 1 CPE 208 10:40 ^m - 11:30 ^m Enabling Cloud-Based Solutions Information Technology 1 CPE 209 12:25 ^m - 115 ^m Considerations For The Accountant With Ederly Clients Specialized Knowledge 1 CPE 210 12:25 ^m		120	2:40 ^{pm} - 3:30 ^{pm}	Striking the Balance Between Digital Security and Usability	Information Technology	1 CPE
Action Register: All Egges on the Economy Economics Eco		121	3:45 ^{PM} - 5:00 ^{PM}	Keynote: Techs, Trends, and Disruptors	Information Technology	1.5 CPE
201 940 [™] - 10:30 [™] Individual Tax Update Taxes 1 CPE/75 GLE/1 CPP/16/ 202 940 [™] - 10:30 [™] Enhancing Leadership at All Levels Personal Development 1 CPE 203 940 [™] - 10:30 [™] Distinguishing and Accounting for Debt and Equity Instruments Accounting 1 CPE 204 940 [™] - 10:30 [™] Finance Automation: Improving Processes for a Successful Journey Information Technology 1 CPE 205 10:40 [™] - 11:30 [™] Business Tax Update Taxes 1 CPE/75 GLE /1 CFP/1 E/ 206 10:40 [™] - 11:30 [™] Non-Competes and Non-Solicts in a Changing Labor Market Business Law 1 CPE/75 GLE 207 10:40 [™] - 11:30 [™] Non-Competes and Non-Solicts in a Changing Labor Market Business Law 1 CPE/75 GLE 208 10:40 [™] - 11:30 [™] SEC Regulatory Update ● Accounting 1 CPE 209 12:25 [™] - 115 [™] Considerations For The Accountant With Elderly Clients Specialized Knowledge 1 CPE 210 12:25 [™] - 115 [™] Audit Update: Changes Are Here Auditing 1 CPE/75 CLE/1 CFP 211 12:25 [™] - 115 [™] Audit Update: Changes Are Here Auditing 1 CPE/75 CLE/1 CFP <t< td=""><td></td><td></td><td></td><td>WEDNESDAY, AUGUST 23,</td><td>2023</td><td></td></t<>				WEDNESDAY, AUGUST 23,	2023	
202 940 ^{wh} 1030 ^{wh} Enhancing Leadership at All Levels Personal Development 1 CPE 203 940 ^{wh} - 1030 ^{wh} Distinguishing and Accounting for Debt and Equity Instruments Accounting 1 CPE 204 940 ^{wh} - 1030 ^{wh} Finance Automation: Improving Processes for a Successful Journey Information Technology 1 CPE 205 1040 ^{wh} - 1130 ^{wh} Business Tax Update Taxes 1 CPE/75 CLE/1 CFP/1 E/ 206 1040 ^{wh} - 1130 ^{wh} Non-Competes and Non-Solicits in a Changing Labor Market Business Law 1 CPE/75 CLE 207 1040 ^{wh} - 1130 ^{wh} SEC Regulatory Update o Accounting 1 CPE 208 1040 ^{wh} - 1130 ^{wh} Enabling Cloud-Based Solutions Information Technology 1 CPE 209 1225 ^{wh} - 115 ^{wh} Considerations For The Accountant With Elderly Clients Specialized Knowledge 1 CPE 210 1225 ^{wh} - 115 ^{wh} Audit Update: Changes Are Here Auditing 1 CPE/75 CLE/1 CFP 211 1225 ^{wh} - 115 ^{wh} Audit Update: Changes Are IHere Auditing 1 CPE/75 CLE/1 CFP 214 125 ^{wh} - 215 ^{wh} Avoiding Pittals: Managing Sales Tax in Multi-State Situations Taxes 1 CPE/75 CLE/1 CFP<		200	8:00 ^{am} - 9:15 ^{am}	Keynote: All Eyes on the Economy	Economics	1.5 CPE/1.5 CFP
2039.40** - 10.30**Distinguishing and Accounting for Debt and Equity InstrumentsAccounting1 CPE2049.40** - 10.30**Finance Automation: Improving Processes for a Successful JourneyInformation Technology1 CPE20510.40** - 11.30**Business Tax UpdateTaxes1 CPE/.75 CLE/.1 CFP/.1E /20610.40** - 11.30**Non-Competes and Non-Solicits in a Changing Labor MarketBusiness Law1 CPE/.75 CLE20710.40** - 11.30**SEC Regulatory Update •Accounting1 CPE20810.40** - 11.30**SEC Regulatory Update •Accounting1 CPE20912.25** - 115**Considerations For The Accountant With Elderly ClientsSpecialized Knowledge1 CPE21012.25** - 115**Presenting Like a ProPersonal Development1 CPE21112.25** - 115**Audit Update: Changes Are HereAuditing1 CPE/.75 CLE/1 CFP21212.25** - 115**Help! Is Your Client's Company Worthless?Business Management & Organization1 CPE/.15 CLE/1 CFP21312.5** - 2.15**Avoiding Pitfalls: Managing Sales Tax in Multi-State SituationsTaxes1 CPE/.75 CLE/1 CFP21412.5** - 2.15**Collaboration Equity in a Hybrid WorkplacePersonal Development1 CPE21512.5** - 2.15**Private Equity Group Ownership: Accounting, Implementation, and ExecutinAccounting1 CPE/.75 CLE/1 CFP/1 E/21612.5** - 2.15**Controller to CFO: Evolving ResponsibilitiesFinance1 CPE/.75 CLE/1 CFP/1 E/21612.5** - 2.15*		201	9:40 ^{am} - 10:30 ^{am}	Individual Tax Update	Taxes	1 CPE/.75 CLE/1 CFP/1 EA
204 9:40 ^{wx} - 10:30 ^{wx} Finance Automation: Improving Processes for a Successful Journey Information Technology 1 CPE 205 10:40 ^{wx} - 11:30 ^{wx} Business Tax Update Taxes 1 CPE/.75 CLE/1 CFP/1 E/ 206 10:40 ^{wx} - 11:30 ^{wx} Non-Competes and Non-Solicits in a Changing Labor Market Business Law 1 CPE/.75 CLE 207 10:40 ^{wx} - 11:30 ^{wx} SEC Regulatory Update • Accounting 1 CPE 208 10:40 ^{wx} - 11:30 ^{wx} SEC Regulatory Update • Accounting 1 CPE 209 10:40 ^{wx} - 11:30 ^{wx} Enabling Cloud-Based Solutions Information Technology 1 CPE 209 12:25 ^{xx} - 115 ^{xx} Considerations For The Accountant With Elderly Clients Specialized Knowledge 1 CPE 210 12:25 ^{xx} - 115 ^{xx} Presenting Like a Pro Personal Development 1 CPE 211 12:25 ^{xx} - 1:5 ^{xx} Audit Update: Changes Are Here Auditing 1 CPE/.75 CLE/1 CFP 212 12:25 ^{xx} - 1:5 ^{xx} Avoiding Pittalis: Managing Sales Tax in Multi-State Situations Taxes 1 CPE/.75 CLE/1 CFP 213 12:5 ^{xx} - 2:1 ^{5xx} Collaboration Equity in a Hybrid Workplace Personal Development 1 CPE		202	9:40 ^{am} - 10:30 ^{am}	Enhancing Leadership at All Levels	Personal Development	1 CPE
20510.40 ^M - 1130 ^M Business Tax UpdateTaxes1 CPE/.75 CLE/1 CFP/1 E/20610.40 ^M - 1130 ^M Non-Competes and Non-Solicits in a Changing Labor MarketBusiness Law1 CPE/.75 CLE20710.40 ^M - 1130 ^M SEC Regulatory Update •Accounting1 CPE20810.40 ^M - 1130 ^M Enabling Cloud-Based SolutionsInformation Technology1 CPE2091225 ^M - 115 ^M Considerations For The Accountant With Elderly ClientsSpecialized Knowledge1 CPE2101225 ^M - 115 ^M Presenting Like a ProPersonal Development1 CPE2111225 ^M - 115 ^M Audit Update: Changes Are HereAuditing1 CPE/.75 CLE/1 CFP/2121225 ^M - 115 ^M Audit Update: Changes Are HereAuditing1 CPE/.75 CLE/1 CFP213125 ^M - 215 ^M Avoiding Pitfalls: Managing Sales Tax in Multi-State SituationsTaxes1 CPE/.75 CLE/1 CFP214125 ^M - 215 ^M Collaboration Equity in a Hybrid WorkplacePersonal Development1 CPE215125 ^M - 215 ^M Collaboration Equity in a Hybrid WorkplacePersonal Development1 CPE216125 ^M - 215 ^M Controller to CF0: Evolving ResponsibilitiesFinance1 CPE/.75 CLE/1 CFP/1 E/216125 ^M - 215 ^M Controller to CF0: Evolving ResponsibilitiesFinance1 CPE/.75 CLE/1 CFP/1 E/217240 ^M - 330 ^M Entity Selection for Taxes (PLUSI)Taxes1 CPE/.75 CLE/1 CFP/1 E/218240 ^M - 330 ^M Sexual Harassment Prevention: Policies, Systems, and Training		203	9:40 ^{am} - 10:30 ^{am}	Distinguishing and Accounting for Debt and Equity Instruments	Accounting	1 CPE
20610:40 M - 11:30 MNon-Competes and Non-Solicits in a Changing Labor MarketBusiness Law1 CPE/75 CLE20710:40 M - 11:30 MSEC Regulatory Update •Accounting1 CPE20810:40 M - 11:30 MEnabling Cloud-Based SolutionsInformation Technology1 CPE20912:25 M - 11:5 MConsiderations For The Accountant With Elderly ClientsSpecialized Knowledge1 CPE21012:25 M - 11:5 MPresenting Like a ProPersonal Development1 CPE21112:25 M - 11:5 MAudit Update: Changes Are HereAuditing1 CPE/75 CLE/1 CFP21312:5 M - 2:15 MHelp! Is Your Client's Company Worthless?Business Management & Organization1 CPE/75 CLE/1 CFP21412:5 M - 2:15 MCollaboration Equity in a Hybrid WorkplacePersonal Development1 CPE21512:5 M - 2:15 MCollaboration Equity in a Hybrid WorkplacePersonal Development1 CPE21612:5 M - 2:15 MController to CFO: Evolving ResponsibilitiesFinance1 CPE/75 CLE/1 CFP21612:5 M - 2:15 MController to CFO: Evolving ResponsibilitiesFinance1 CPE/75 CLE/1 CFP/1 E/2172:40 M - 3:30 MSexual Harassment Prevention: Policies, Systems, and TrainingPersonal Development, SHPT1 CPE/75 CLE/1 CFP/1 E/2182:40 M - 3:30 MGexual Harassment Prevention: Policies, Systems, and TrainingPersonal Development, SHPT1 CPE/1 SHPT2192:40 M - 3:30 MGexual Harassment Prevention: Policies, Systems, and TrainingPersonal Development, SHPT1 CPE/1		204	9:40 ^{am} - 10:30 ^{am}	Finance Automation: Improving Processes for a Successful Journey	Information Technology	1 CPE
207 10:40 ^{M-1} 11:30 ^M SEC Regulatory Update • Accounting 1 CPE 208 10:40 ^{M-1} 11:30 ^M Enabling Cloud-Based Solutions Information Technology 1 CPE 209 1225 ^{M-1} 11:5 ^M Considerations For The Accountant With Elderly Clients Specialized Knowledge 1 CPE 210 1225 ^{M-1} 11:5 ^M Considerations For The Accountant With Elderly Clients Specialized Knowledge 1 CPE 211 1225 ^{M-1} 11:5 ^M Presenting Like a Pro Personal Development 1 CPE 212 1225 ^{M-1} 11:5 ^M Audit Update: Changes Are Here Auditing 1 CPE/1 CFP 212 1225 ^{M-1} 11:5 ^M Help! Is Your Client's Company Worthless? Business Management & Organization 1 CPE/1 CFP 213 125 ^{M-2} 15 ^M Avoiding Pitfalls: Managing Sales Tax in Multi-State Situations Taxes 1 CPE/7 S CLE/1 CFP 214 125 ^{M-2} 15 ^M Collaboration Equity in a Hybrid Workplace Personal Development 1 CPE 215 125 ^{M-2} 15 ^M Controller to CFO: Evolving Responsibilities Finance 1 CPE 216 125 ^{M-3} - 215 ^M Controller to CFO: Evolving Responsibilities Finance 1 CPE/1 SHPT 21		205	10:40 ^{am} - 11:30 ^{am}	Business Tax Update	Taxes	1 CPE/.75 CLE/1 CFP/1 EA
20810.40*** - 1130***Enabling Cloud-Based SolutionsInformation Technology1 CPE2091225*** - 115***Considerations For The Accountant With Elderly ClientsSpecialized Knowledge1 CPE2101225*** - 115***Presenting Like a ProPersonal Development1 CPE2111225*** - 115***Audit Update: Changes Are HereAuditing1 CPE2121225*** - 115***Help! Is Your Client's Company Worthless?Business Management & Organization1 CPE//1 CFP213125*** - 215***Avoiding Pitfalls: Managing Sales Tax in Multi-State SituationsTaxes1 CPE//75 CLE/1 CFP214125*** - 215***Collaboration Equity in a Hybrid WorkplacePersonal Development1 CPE215125*** - 215***Collaboration Equity in a Hybrid WorkplacePersonal Development1 CPE216125*** - 215***Collaboration Equity in a Hybrid WorkplacePersonal Development1 CPE216125*** - 215***Controller to CFO: Evolving ResponsibilitiesFinance1 CPE217240*** - 330***Entity Selection for Taxes (PLUS!)Taxes1 CPE/.75 CLE/1 CFP/1 E/218240*** - 330***Guality Management Standards: Staying CompliantAuditing1 CPE/.15HPT219240*** - 330***Guality Management Standards: Staying CompliantAuditing1 CPE220240*** - 330***Future-Proof Your Firm: Metrics That MatterInformation Technology1 CPE		206	10:40 ^{am} - 11:30 ^{am}	Non-Competes and Non-Solicits in a Changing Labor Market	Business Law	1 CPE/.75 CLE
2091225 ^M - 1:15 TM Considerations For The Accountant With Elderly ClientsSpecialized Knowledge1 CPE2101225 TM - 1:15 TM Presenting Like a ProPersonal Development1 CPE2111225 TM - 1:15 TM Audit Update: Changes Are HereAuditing1 CPE2121225 TM - 1:15 TM Help! Is Your Client's Company Worthless?Business Management & Organization1 CPE/1 CFP213125 TM - 2:15 TM Avoiding Pitfalls: Managing Sales Tax in Multi-State SituationsTaxes1 CPE/75 CLE/1 CFP214125 TM - 2:15 TM Collaboration Equity in a Hybrid WorkplacePersonal Development1 CPE215125 TM - 2:15 TM Collaboration Equity in a Hybrid WorkplacePersonal Development1 CPE216125 TM - 2:15 TM Private Equity Group Ownership: Accounting, Implementation, and ExecutionAccounting1 CPE216125 TM - 2:15 TM Controller to CFO: Evolving ResponsibilitiesFinance1 CPE217240 TM - 3:30 TM Entity Selection for Taxes (PLUS!)Taxes1 CPE/75 CLE/1 CFP/1 E/2182:40 TM - 3:30 TM Guality Management Standards: Staying CompliantAuditing1 CPE/1 SHPT2192:40 TM - 3:30 TM Quality Management Standards: Staying CompliantAuditing1 CPE2102:40 TM - 3:30 TM Future-Proof Your Firm: Metrics That MatterInformation Technology1 CPE		207	10:40 ^{am} - 11:30 ^{am}	SEC Regulatory Update 0	Accounting	1 CPE
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2111225***115***Audit Update: Changes Are HereAuditing1 CPE2121225***115***Help! Is Your Client's Company Worthless?Business Management & Organization1 CPE/1 CFP213125***2:15***Avoiding Pitfalls: Managing Sales Tax in Multi-State SituationsTaxes1 CPE/.75 CLE/1 CFP214125***2:15***Collaboration Equity in a Hybrid WorkplacePersonal Development1 CPE215125***2:15***Collaboration Equity Group Ownership: Accounting, Implementation, and ExecutionAccounting1 CPE216125***2:15***Controller to CFO: Evolving ResponsibilitiesFinance1 CPE2172:40***3:30***Entity Selection for Taxes (PLUS!)Taxes1 CPE/.75 CLE/1 CFP/1 EA2182:40***3:30***Sexual Harassment Prevention: Policies, Systems, and TrainingPersonal Development, SHPT1 CPE/1 SHPT2192:40***3:30***Quality Management Standards: Staying CompliantAuditing1 CPE2102:40***3:30***Future-Proof Your Firm: Metrics That MatterInformation Technology1 CPE		209	12:25 ^{₽м} - 1:15 ^{₽м}	Considerations For The Accountant With Elderly Clients	Specialized Knowledge	1 CPE
2121225PM - 1:15PMHelp! Is Your Client's Company Worthless?Business Management & Organization1 CPE/1 CFP213125FM - 2:15PMAvoiding Pitfalls: Managing Sales Tax in Multi-State SituationsTaxes1 CPE/.75 CLE/1 CFP214125FM - 2:15PMCollaboration Equity in a Hybrid WorkplacePersonal Development1 CPE215125FM - 2:15PMPrivate Equity Group Ownership: Accounting, Implementation, and ExecutionAccounting1 CPE216125FM - 2:15PMController to CFO: Evolving ResponsibilitiesFinance1 CPE2172:40°M - 3:30°MEntity Selection for Taxes (PLUS!)Taxes1 CPE/.75 CLE/1 CFP/ 1 E/2182:40°M - 3:30°MSexual Harassment Prevention: Policies, Systems, and TrainingPersonal Development, SHPT1 CPE/1 SHPT2192:40°M - 3:30°MQuality Management Standards: Staying CompliantAuditing1 CPE2202:40°M - 3:30°MFuture-Proof Your Firm: Metrics That MatterInformation Technology1 CPE		210	12:25 [™] - 1:15 [™]	Presenting Like a Pro	Personal Development	1 CPE
213125PM - 2:15PMAvoiding Pittalls: Managing Sales Tax in Multi-State SituationsTaxes1 CPE/.75 CLE/1 CFP214125PM - 2:15PMCollaboration Equity in a Hybrid WorkplacePersonal Development1 CPE215125PM - 2:15PMCollaboration Equity Group Ownership: Accounting, Implementation, and ExecutionAccounting1 CPE216125PM - 2:15PMController to CFO: Evolving ResponsibilitiesFinance1 CPE216125PM - 2:15PMController to CFO: Evolving ResponsibilitiesFinance1 CPE2172:40PM - 3:30PMEntity Selection for Taxes (PLUS!)Taxes1 CPE/.75 CLE/1 CFP/1 E/2182:40PM - 3:30PMSexual Harassment Prevention: Policies, Systems, and TrainingPersonal Development, SHPT1 CPE/1 SHPT2192:40PM - 3:30PMQuality Management Standards: Staying CompliantAuditing1 CPE2202:40PM - 3:30PMFuture-Proof Your Firm: Metrics That MatterInformation Technology1 CPE		211	12:25 ^{₽м} - 1:15 ^{₽м}	Audit Update: Changes Are Here	Auditing	1 CPE
214 125 ^{PM} - 2:15 ^{PM} Collaboration Equity in a Hybrid Workplace Personal Development 1 CPE 215 125 ^{PM} - 2:15 ^{PM} Private Equity Group Ownership: Accounting, Implementation, and Execution Accounting 1 CPE 216 125 ^{PM} - 2:15 ^{PM} Controller to CFO: Evolving Responsibilities Finance 1 CPE 217 2:40 ^{PM} - 3:30 ^{PM} Entity Selection for Taxes (PLUS!) Taxes 1 CPE/.75 CLE/1 CFP/1 EA 218 2:40 ^{PM} - 3:30 ^{PM} Sexual Harassment Prevention: Policies, Systems, and Training Personal Development, SHPT 1 CPE/1 SHPT 219 2:40 ^{PM} - 3:30 ^{PM} Quality Management Standards: Staying Compliant Auditing 1 CPE 220 2:40 ^{PM} - 3:30 ^{PM} Future-Proof Your Firm: Metrics That Matter Information Technology 1 CPE		212	12:25 ^{pm} - 1:15 ^{pm}	Help! Is Your Client's Company Worthless?	Business Management & Organization	1 CPE/1 CFP
215 125 ^{PM} - 2:15 ^{PM} Private Equity Group Ownership: Accounting, Implementation, and Execution Accounting 1 CPE 216 125 ^{PM} - 2:15 ^{PM} Controller to CFO: Evolving Responsibilities Finance 1 CPE 217 2:40 ^{PM} - 3:30 ^{PM} Entity Selection for Taxes (PLUS!) Taxes 1 CPE/.75 CLE/1 CFP/1 EA 218 2:40 ^{PM} - 3:30 ^{PM} Sexual Harassment Prevention: Policies, Systems, and Training Personal Development, SHPT 1 CPE/1 SHPT 219 2:40 ^{PM} - 3:30 ^{PM} Quality Management Standards: Staying Compliant Auditing 1 CPE 220 2:40 ^{PM} - 3:30 ^{PM} Future-Proof Your Firm: Metrics That Matter Information Technology 1 CPE		213	1:25 ^{pm} - 2:15 ^{pm}	Avoiding Pitfalls: Managing Sales Tax in Multi-State Situations	Taxes	1 CPE/.75 CLE/1 CFP
216 125 ^{FM} - 2:15 ^{FM} Controller to CFO: Evolving Responsibilities Finance 1 CPE 217 2:40 ^{FM} - 3:30 ^{FM} Entity Selection for Taxes (PLUS!) Taxes 1 CPE/.75 CLE/1 CFP/1 E/ 218 2:40 ^{FM} - 3:30 ^{FM} Sexual Harassment Prevention: Policies, Systems, and Training Personal Development, SHPT 1 CPE/1 SHPT 219 2:40 ^{FM} - 3:30 ^{FM} Quality Management Standards: Staying Compliant Auditing 1 CPE 220 2:40 ^{FM} - 3:30 ^{FM} Future-Proof Your Firm: Metrics That Matter Information Technology 1 CPE		214	1:25 ^{pm} - 2:15 ^{pm}	Collaboration Equity in a Hybrid Workplace	Personal Development	1 CPE
217 2:40 ^{PM} - 3:30 ^{PM} Entity Selection for Taxes (PLUS!) Taxes 1 CPE/.75 CLE/1 CFP/1 E/ 218 2:40 ^{PM} - 3:30 ^{PM} Sexual Harassment Prevention: Policies, Systems, and Training Personal Development, SHPT 1 CPE/1 SHPT 219 2:40 ^{PM} - 3:30 ^{PM} Quality Management Standards: Staying Compliant Auditing 1 CPE 220 2:40 ^{PM} - 3:30 ^{PM} Future-Proof Your Firm: Metrics That Matter Information Technology 1 CPE		215	1:25 ^{pm} - 2:15 ^{pm}	Private Equity Group Ownership: Accounting, Implementation, and Execution	Accounting	1 CPE
218 2:40 ^{PM} - 3:30 ^{PM} Sexual Harassment Prevention: Policies, Systems, and Training Personal Development, SHPT 1 CPE/1 SHPT 219 2:40 ^{PM} - 3:30 ^{PM} Quality Management Standards: Staying Compliant Auditing 1 CPE 220 2:40 ^{PM} - 3:30 ^{PM} Future-Proof Your Firm: Metrics That Matter Information Technology 1 CPE		216	1:25 ^{pm} - 2:15 ^{pm}	Controller to CFO: Evolving Responsibilities	Finance	1 CPE
219 2:40 ^{PM} - 3:30 ^{PM} Quality Management Standards: Staying Compliant Auditing 1 CPE 220 2:40 ^{PM} - 3:30 ^{PM} Future-Proof Your Firm: Metrics That Matter Information Technology 1 CPE		217	2:40 ^{pm} - 3:30 ^{pm}	Entity Selection for Taxes (PLUS!)	Taxes	1 CPE/.75 CLE/1 CFP/1 EA
220 2:40 ^{PM} - 3:30 ^{PM} Future-Proof Your Firm: Metrics That Matter Information Technology 1 CPE		218	2:40 ^{PM} - 3:30 ^{PM}	Sexual Harassment Prevention: Policies, Systems, and Training	Personal Development, SHPT	1 CPE/1 SHPT
		219	2:40 ^{PM} - 3:30 ^{PM}	Quality Management Standards: Staying Compliant	Auditing	1 CPE
221 3:45 ^{PM} - 5:00 ^{PM} Keynote: The State of the CPA Profession: Embracing the Possibilities Accounting 1.5 CPE		220	2:40 ^{PM} - 3:30 ^{PM}	Future-Proof Your Firm: Metrics That Matter	Information Technology	1 CPE
		221	3:45 ^{PM} - 5:00 ^{PM}	Keynote: The State of the CPA Profession: Embracing the Possibilities	Accounting	1.5 CPE

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- Upon registering for ICPAS SUMMIT23, attendees will receive an email confirmation.
- Starting August 14, 2023, all registered attendees will receive access to the SUMMIT23 portal.
- All attendees will receive an email the week prior to ICPAS SUMMIT23 that will include helpful hints, tips, and event details.
- In-person attendees will pick up their badge onsite the day of the event at the registration booth.

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- 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

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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.



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