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ICPAS **SUMMIT**[™]23

The Premier Event for Accounting and Finance Professionals[™]

EXPANDING THE
POSSIBILITIES



ILLINOIS CPA SOCIETY®
www.icpas.org

August 22-23, 2023

Donald E. Stephens Convention Center
Rosemont, Illinois

Register today at www.icpas.org/summit

EXPANDING THE POSSIBILITIES

With the right insights, knowledge, and
inspiration, anything is possible.

SUMMIT23 will help inspire a new mindset
and approach for navigating the future.

Expert Keynote Speakers

Expand your outlook with fresh ideas and strategic
insights from national thought leaders:

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

Innovative Learning Tracks

Personalize your learning with four topic
tracks to choose from:

- Tax Track
- Personal Development/Ethics Track
- Accounting and Auditing Track
- Corporate Finance/Technology Track

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Earn while you learn!
16 CPE hours, plus a variety of specialty credits including:
6.75 CLE* | 11.5 CFP* | 7 EA | 2 Ethics
1 Sexual Harassment Prevention Training (SHPT)
*pending approval

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.”*

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

Running a Business in a Chaotic Environment



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

Engaging Exhibitor Experiences

Get hands on with the latest products and services
from exhibitors such as:

- | | |
|-----------------------------------|---------------------------|
| Cook County Department of Revenue | Justworks |
| CPA Charge | KBKG |
| CSSI - Mark Gross | LeaseQuery |
| Drake Software | PracticeERP |
| Expensify | Robert Half |
| IRS | SafeSend |
| | Your Part-Time Controller |




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

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 
For the latest speaker updates, visit www.icpas.org/summit

8.22.23	8:00AM - 9:15AM	9:15AM - 9:40AM	9:40AM - 10:30AM	10:40AM - 11:30AM	11:30AM - 12:25PM	12:25PM - 1:15PM	12:5PM - 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	<div>Techs, Trends, and Disruptors</div> <div>Roman Kepczyk</div> <div>Code: 121</div>					Protecting Your Tax-Exempt Organization Code: 109 CLE: .75* CFP: 1* EA: 1	The Who, What, and Why of Roth IRAs and Roth Conversions Code: 113 CLE: .75* CFP: 1* EA: 1	Introduction to Cost Segregation and the Impacts on Tax Reform Code: 117 CLE: .75* CFP: 1* EA: 1 <div>Session Sponsor: KBKG</div>					
Personal Development/Ethics						Becoming an Ethical Leader to Drive Crucial Business Results Code: 102 Ethics: 1	Corporate Governance: Ensuring Sufficient Supervision Code: 106 CLE: .75*	Leading Up: The Superpower Every Ascending Leader Needs Code: 110	Breaking Barriers: Supporting Diverse Talent in Your Workplace Code: 114	Tax Ethics: Circular 230 Code: 118 Ethics: 1 EA: 1			
Accounting and Auditing						Accounting and Auditing Issues of Digital Assets Code: 103	Delivering Sustainable Assurance Code: 107	Get Ready for CECL: Private Entities and Not-for-Profits Adoption Code: 111	What's Up With FASB in 2023? Code: 115	SOC Engagements and Reporting Code: 119			
Corporate Finance/Technology	<div>State of the CPA Profession: Embracing the Possibilities</div> <div>Geof Brown</div> <div>Jonathan Hauser</div> <div>Code: 100</div>								Budgeting vs. Forecasting Code: 112 CFP: 1*	Technology Adoption and Workplace Culture Code: 116	Striking the Balance Between Digital Security and Usability Code: 120		
									Ignite Your Client Engagement Strategy Code: 108				
									Growing Through FP&A Evolution Code: 104 CFP: 1*				
									State Taxes: Ethical Dilemmas and Managing Risks Code: 101 CLE: .75* CFP: 1*				
									International Tax Update Code: 105 CLE: .75* CFP: 1* EA: 1				

*Specialty Credits Pending Approval

8.23.23	8:00AM - 9:15AM	9:15AM - 9:40AM	9:40AM - 10:30AM	10:40AM - 11:30AM	11:30AM - 12:25PM	12:25PM - 1:15PM	12:5PM - 2:15PM	2:40PM - 3:30PM	3:45PM - 5:00PM
TRACKS	KEYNOTE	BREAK	SESSIONS	SESSIONS	BREAK	SESSIONS	SESSIONS	SESSIONS	KEYNOTE
Tax			Individual Tax Update Code: 201 CLE: .75* CFP: 1* EA: 1	Business Tax Update Code: 205 CLE: .75* CFP: 1* EA: 1		Considerations for the Accountant With Elderly Clients Code: 209	Avoiding Pitfalls: Managing Sales Tax in Multi-State Situations Code: 213 CLE: .75* CFP: 1* Session Sponsor: 	Entity Selection for Taxes (PLUS) Code: 217 CLE: .75* CFP: 1* EA: 1	
Personal Development/Ethics	All Eyes on the Economy Derek Sasveld Code: 200 CFP: 15*		Enhancing Leadership at All Levels Code: 202	Non-Competes and Non-Solicits in a Changing Labor Market Code: 206 CLE: .75*		Presenting Like a Pro Code: 210	Collaboration Equity in a Hybrid Workplace Code: 214	Sexual Harassment Prevention: Policies, Systems, and Training Code: 218 SHPT: 1	Running a Business in a Chaotic Environment Dorri McWhorter Code: 221
Accounting and Auditing			Distinguishing and Accounting for Debt and Equity Instruments Code: 203	SEC Regulatory Update Code: 207 		Audit Update: Changes Are Here Code: 211	Private Equity Group Ownership: Accounting, Implementation, and Execution Code: 215	Quality Management Standards: Staying Compliant Code: 219	
Corporate Finance/Technology			Finance Automation: Improving Processes for a Successful Journey Code: 204	Enabling Cloud-Based Solutions Code: 208		Help! Is Your Client's Company Worthless? Code: 212 CFP: 1*	Controller to CFO: Evolving Responsibilities Code: 216	Future-Proof Your Firm: Metrics That Matter Code: 220 Session Sponsor: 	

*Specialty Credits Pending Approval

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.

Tuesday

8.22.23

8.22.23 | 8:00 AM - 9:15 AM

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

KEYNOTE

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 first-time adoption and transition issues. Plus, discuss the notable impacts on trade account receivables.

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

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

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 | 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

8.23.23 | 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 AI-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

KEYNOTE

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

KEYNOTE

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

Wednesday
8.23.23

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

Session Sponsor: 

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 | 3:45 PM - 5:00 PM

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

8.23.23 | 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

Session Sponsor: 

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

REGISTRATION OPTIONS

Date:	Title:	ICPAS M/NM:	Total:
<input type="checkbox"/> 8/21	Pre-SUMMIT Virtual Workshops - select session below	\$235/310	\$ _____
<input type="checkbox"/> 8/22-23	2-Day Pass	\$380/\$415	\$ _____
<input type="checkbox"/> 8/22	Day One Pass	\$330/\$365	\$ _____
<input type="checkbox"/> 8/23	Day Two Pass	\$330/\$365	\$ _____
PLEASE SELECT ONE. I will be attending SUMMIT23: <input type="checkbox"/> IN PERSON <input type="checkbox"/> 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 21, 2023				
<input type="checkbox"/> 004	1:00 ^{PM} - 4:30 ^{PM}	Basic Trusts: Taxation of Trusts and Preparing Form 1041	Taxes	4 CPE/3.25 CLE*/4 CFP*/4 EA
<input type="checkbox"/> 005	1:00 ^{PM} - 4:30 ^{PM}	IRS Exams, Appeals, and Audits: What You Need to Know	Taxes	4 CPE/3.25 CLE*/4 CFP*/4 EA
TUESDAY, AUGUST 22, 2023				
<input type="checkbox"/> 100	8:00 ^{AM} - 9:15 ^{AM}	Keynote: The State of the CPA Profession: Embracing the Possibilities	Accounting	1.5 CPE
<input type="checkbox"/> 101	9:40 ^{AM} - 10:30 ^{AM}	State Taxes: Ethical Dilemmas and Managing Risks	Taxes	1 CPE/.75 CLE*/1 CFP*
<input type="checkbox"/> 102	9:40 ^{AM} - 10:30 ^{AM}	Becoming an Ethical Leader to Drive Crucial Business Results	Behavioral Ethics	1 CPE/1 Ethics
<input type="checkbox"/> 103	9:40 ^{AM} - 10:30 ^{AM}	Accounting and Auditing Issues of Digital Assets	Accounting .5, Auditing .5	1 CPE
<input type="checkbox"/> 104	9:40 ^{AM} - 10:30 ^{AM}	Growing Through FP&A Evolution	Finance	1 CPE/1 CFP*
<input type="checkbox"/> 105	10:40 ^{AM} - 11:30 ^{AM}	International Tax Update	Taxes	1 CPE/.75 CLE*/1 CFP*/1 EA
<input type="checkbox"/> 106	10:40 ^{AM} - 11:30 ^{AM}	Corporate Governance: Ensuring Sufficient Supervision	Business Management & Organization	1 CPE/.75 CLE*
<input type="checkbox"/> 107	10:40 ^{AM} - 11:30 ^{AM}	Delivering Sustainable Assurance	Accounting	1 CPE
<input type="checkbox"/> 108	10:40 ^{AM} - 11:30 ^{AM}	Ignite Your Client Engagement Strategy	Technology	1 CPE
<input type="checkbox"/> 109	12:25 ^{PM} - 1:15 ^{PM}	Protecting Your Tax-Exempt Organization	Taxes	1 CPE/.75 CLE*/1 CFP*/1 EA
<input type="checkbox"/> 110	12:25 ^{PM} - 1:15 ^{PM}	Leading Up: The Superpower Every Ascending Leader Needs	Personal Development	1 CPE
<input type="checkbox"/> 111	12:25 ^{PM} - 1:15 ^{PM}	Get Ready for CECL: Private Entities and Not-for-Profits Adoption	Accounting	1 CPE
<input type="checkbox"/> 112	12:25 ^{PM} - 1:15 ^{PM}	Budgeting vs. Forecasting	Finance	1 CPE/1 CFP*
<input type="checkbox"/> 113	1:25 ^{PM} - 2:15 ^{PM}	The Who, What, and Why of Roth IRAs and Roth Conversions	Taxes	1 CPE/.75 CLE*/1 CFP*/1 EA

✓ Code:	Time:	Title:	Field of Study:	Credits:
*Specialty Credits Pending Approval				
TUESDAY, AUGUST 22, 2023 (CONTINUED)				
<input type="checkbox"/> 114	1:25 ^{PM} - 2:15 ^{PM}	Breaking Barriers: Supporting Diverse Talent in Your Workplace	Personnel/Human Resources	1 CPE
<input type="checkbox"/> 115	1:25 ^{PM} - 2:15 ^{PM}	What's Up With FASB in 2023?	Accounting	1 CPE
<input type="checkbox"/> 116	1:25 ^{PM} - 2:15 ^{PM}	Technology Adoption and Workplace Culture	Information Technology	1 CPE
<input type="checkbox"/> 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
<input type="checkbox"/> 118	2:40 ^{PM} - 3:30 ^{PM}	Tax Ethics: Circular 230	Regulatory Ethics	1 CPE/1 Ethics/1 EA
<input type="checkbox"/> 119	2:40 ^{PM} - 3:30 ^{PM}	SOC Engagements and Reporting	Auditing	1 CPE
<input type="checkbox"/> 120	2:40 ^{PM} - 3:30 ^{PM}	Striking the Balance Between Digital Security and Usability	Information Technology	1 CPE
<input type="checkbox"/> 121	3:45 ^{PM} - 5:00 ^{PM}	Keynote: Techs, Trends, and Disruptors	Information Technology	1.5 CPE

WEDNESDAY, AUGUST 23, 2023				
<input type="checkbox"/> 200	8:00 ^{AM} - 9:15 ^{AM}	Keynote: All Eyes on the Economy	Economics	1.5 CPE/1.5 CFP*
<input type="checkbox"/> 201	9:40 ^{AM} - 10:30 ^{AM}	Individual Tax Update	Taxes	1 CPE/.75 CLE*/1 CFP*/1 EA
<input type="checkbox"/> 202	9:40 ^{AM} - 10:30 ^{AM}	Enhancing Leadership at All Levels	Personal Development	1 CPE
<input type="checkbox"/> 203	9:40 ^{AM} - 10:30 ^{AM}	Distinguishing and Accounting for Debt and Equity Instruments	Accounting	1 CPE
<input type="checkbox"/> 204	9:40 ^{AM} - 10:30 ^{AM}	Finance Automation: Improving Processes for a Successful Journey	Information Technology	1 CPE
<input type="checkbox"/> 205	10:40 ^{AM} - 11:30 ^{AM}	Business Tax Update	Taxes	1 CPE/.75 CLE*/1 CFP*/1 EA
<input type="checkbox"/> 206	10:40 ^{AM} - 11:30 ^{AM}	Non-Competes and Non-Solicits in a Changing Labor Market	Business Law	1 CPE/.75 CLE*
<input type="checkbox"/> 207	10:40 ^{AM} - 11:30 ^{AM}	SEC Regulatory Update 	Accounting	1 CPE
<input type="checkbox"/> 208	10:40 ^{AM} - 11:30 ^{AM}	Enabling Cloud-Based Solutions	Information Technology	1 CPE
<input type="checkbox"/> 209	12:25 ^{PM} - 1:15 ^{PM}	Considerations For The Accountant With Elderly Clients	Specialized Knowledge	1 CPE
<input type="checkbox"/> 210	12:25 ^{PM} - 1:15 ^{PM}	Presenting Like a Pro	Personal Development	1 CPE
<input type="checkbox"/> 211	12:25 ^{PM} - 1:15 ^{PM}	Audit Update: Changes Are Here	Auditing	1 CPE
<input type="checkbox"/> 212	12:25 ^{PM} - 1:15 ^{PM}	Help! Is Your Client's Company Worthless?	Business Management & Organization	1 CPE/1 CFP*
<input type="checkbox"/> 213	1:25 ^{PM} - 2:15 ^{PM}	Avoiding Pitfalls: Managing Sales Tax in Multi-State Situations	Taxes	1 CPE/.75 CLE*/1 CFP*
<input type="checkbox"/> 214	1:25 ^{PM} - 2:15 ^{PM}	Collaboration Equity in a Hybrid Workplace	Personal Development	1 CPE
<input type="checkbox"/> 215	1:25 ^{PM} - 2:15 ^{PM}	Private Equity Group Ownership: Accounting, Implementation, and Execution	Accounting	1 CPE
<input type="checkbox"/> 216	1:25 ^{PM} - 2:15 ^{PM}	Controller to CFO: Evolving Responsibilities	Finance	1 CPE
<input type="checkbox"/> 217	2:40 ^{PM} - 3:30 ^{PM}	Entity Selection for Taxes (PLUS!)	Taxes	1 CPE/.75 CLE*/1 CFP*/1 EA
<input type="checkbox"/> 218	2:40 ^{PM} - 3:30 ^{PM}	Sexual Harassment Prevention: Policies, Systems, and Training	Personal Development, SHPT	1 CPE/1 SHPT
<input type="checkbox"/> 219	2:40 ^{PM} - 3:30 ^{PM}	Quality Management Standards: Staying Compliant	Auditing	1 CPE
<input type="checkbox"/> 220	2:40 ^{PM} - 3:30 ^{PM}	Future-Proof Your Firm: Metrics That Matter	Information Technology	1 CPE
<input type="checkbox"/> 221	3:45 ^{PM} - 5:00 ^{PM}	Keynote: Running a Business in a Chaotic Environment	Business Management & Organization	1.5 CPE

REGISTRATION INFORMATION (PRE-REGISTER TODAY!)

Pre-Registration Process:

- 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.

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.

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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