

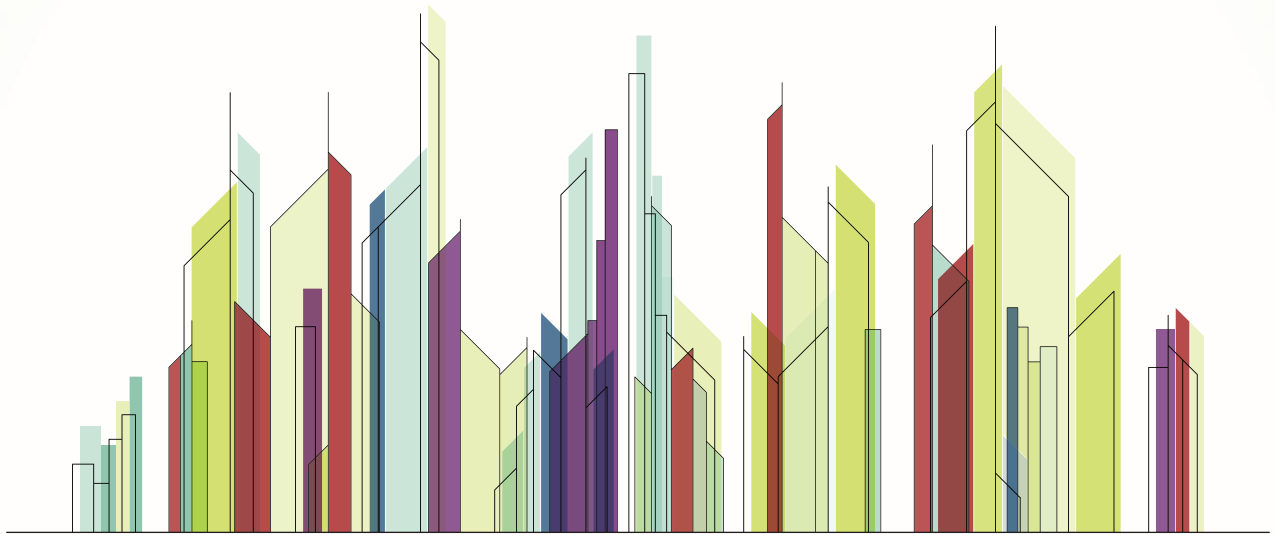
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ICPAS **SUMMIT**TM 24

The Premier Event for Accounting and Finance ProfessionalsTM



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August 27-28, 2024

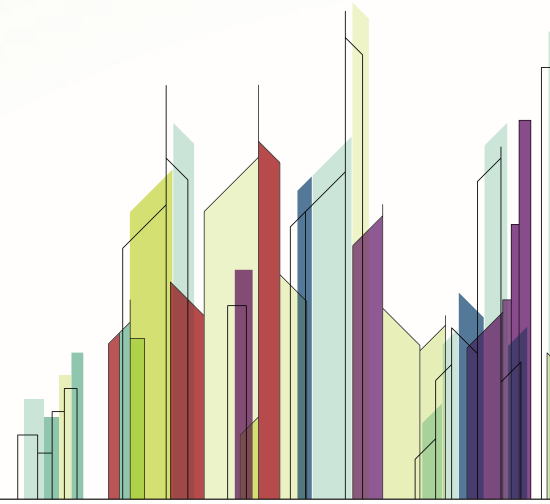
Donald E. Stephens Convention Center, Rosemont, IL

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ILLINOIS CPA SOCIETY®
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BUILDING YOUR FUTURE



Expert Keynote Speakers

Expand your possibilities with innovative ideas and strategic insights from national thought leaders:

The State of the CPA Profession: It's Time to Think Big



Geoffrey Brown, CAE
President and CEO,
Illinois CPA Society



Deborah Rood, CPA, MST
Chairperson, Illinois CPA Society
and Risk Control Consulting
Director, CNA Insurance

Human Capital Management: How to Best Engage and Retain Top Talent



Sirmara Campbell
Chief Human Resources
Officer, LaSalle Network

Techs and Trends: 2024 Update



**Roman Kepczyk, CPA,
CITP, CGMA, LSS BB**
Director of Firm Technology
Strategy, Rightworks

A Look Ahead at the U.S. Economy



LaVaughn Henry, Ph.D., CBE
Former Sr. Economist, Council
of Economic Advisers, Executive
Office of the President (the
White House) and Sr. Regional
Officer and VP, Federal Reserve
Bank of Cleveland

Maintaining Ethical Objectivity and Independence



Kathy Enstrom, MBA, EA
Director of Investigations,
Moore Tax Law Group LLC

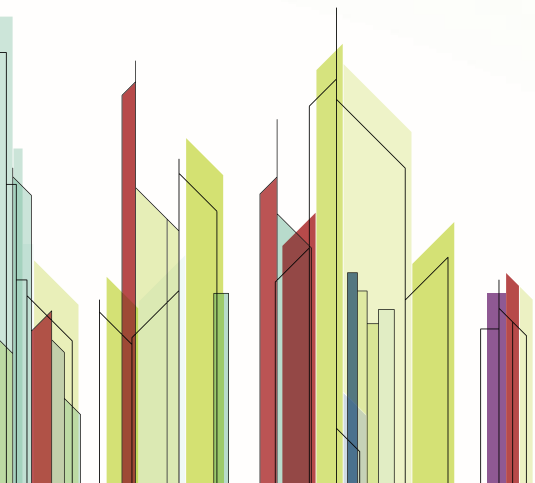


Guinevere Moore, JD
Managing Member, Moore
Tax Law Group LLC

REAL Leadership: Navigating Today's Workplace



LaTonya Wilkins, MBA
Founder and CEO,
Change Coaches



ICPAS SUMMITTM 24

will help you lay the foundation for success with essential skills, knowledge, and insights.

Innovative Learning Tracks

Personalize your learning with four topic tracks to choose from:

Tax
Personal Development/Human Capital
Accounting and Auditing
Corporate Finance/Technology

CPE Credits and More

Earn while you learn, including specialty credits:

16 CPE hours | **6.5 CLE** (pending) | **10.5 CFP** (pending)
7 EA (pending) | **4 Ethics** | **1 SHPT** (Sexual Harassment Prevention Training)

Engaging Exhibitor Experiences

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

Acumatica
alliantgroup
Blue J
Byline Bank
Chase
CPA Charge,
an Affinipay Solution
Drake Software
Edge Financial Advisors
Engineered Tax Services
Entigrity
Gruntworx
HR Source
ILBOE
IDFPR
Integra Balance AI
Justworks

Keeper
Keyence
Miles Talent Hub
NetGain
Origin Investments
Paradise Financial Partners
Paychex, Inc.
PracticeERP
Robert Half
SafeSend
Soraban
Symtrax
TaxDome
Thomson Reuters
Wolters Kluwer
WorkShare IL

All exhibitors will be available in person and virtually. As of 8.7.24.

What People Are Saying

"The variety of options throughout the day for all practitioners were excellent."

"Excellent event as always."

"I look forward to the ICPAS SUMMIT each year. The virtual option has been a big plus for me with an extremely busy schedule."

"The SUMMIT is well organized and worth the time and money to learn about recent topics."

"The virtual format technology was excellent."

NEW THIS YEAR!



**FREE Breakfast
and Coffee!**

PLEASE NOTE:

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

Some of the SUMMIT24 speakers may be presenting remotely for both the in-person and virtual venues.

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

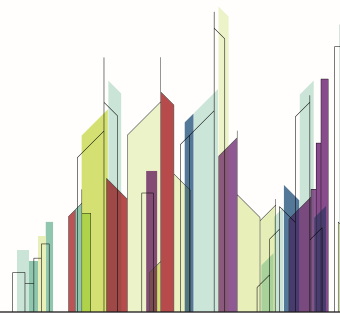
8.27.24	8:00 ^{AM} - 8:50 ^{AM}	9:00 ^{AM} - 9:50 ^{AM}	10:15 ^{AM} - 11:05 ^{AM}	11:15 ^{AM} - 12:05 ^{PM}	12:55 ^{PM} - 1:45 ^{PM}	1:55 ^{PM} - 2:45 ^{PM}	3:20 ^{PM} - 5:00 ^{PM}
TRACKS	KEYNOTE	SESSIONS	SESSIONS	KEYNOTE	SESSIONS	SESSIONS	KEYNOTE
Tax		<p>Tax Insights for the Tax-Exempt World Code: 101 CLE: 75 CFP: 1 EA: 1</p>	<p>Navigating Tax Credits and Incentives for Maximum Business Advantage Code: 105 CLE: 75 CFP: 1 EA: 1 Session Sponsor: </p>		<p>Applying the New Tax Ethics Standards Code: 110 CLE: 75 CFP: 1 EA: 1</p>	<p>Opportunities in Estate Planning Code: 114 CLE: 75 CFP: 1 EA: 1</p>	
Personal Development/ Human Capital	<p>The State of the CPA Profession: It's Time to Think Big</p>  <p>Geoffrey Brown</p>	<p>Blueprint for Offshoring Success Code: 102 Session Sponsor: </p>	<p>Branding Illuminated Code: 106</p>	<p>Human Capital Management: How to Best Engage and Retain Top Talent</p>  <p>Sirmara Campbell Code: 109</p>	<p>Build a World-Class Learning Organization on a Budget Code: 111</p>	<p>Measure Your Ethics Through Change Code: 115</p>	<p>Techs and Trends: 2024 Update</p>  <p>Roman Kepczyk Code: 118</p>
Accounting and Auditing		<p>Accounting Update Code: 103</p>	<p>Auditing Update Code: 107</p>		<p>Single Audit Update Code: 112</p>	<p>Yellow Book Update Code: 116</p>	
Corporate Finance/Technology		<p>Develop Insights to Improve Decision-Making Code: 104</p>	<p>Making Complex Ideas Easy to Understand Code: 108</p>		<p>The Role of AI in the Workplace Code: 113</p>	<p>Anatomy of a Collaborative Budget Process Code: 117 CFP: 1</p>	
BREAK 2:45 ^{PM} - 3:20 ^{PM}							

DAY TWO AT-A-GLANCE

Wednesday, August 28, 2024

8.28.24	8:00 ^{AM} - 9:15 ^{AM}	9:25 ^{AM} - 10:15 ^{AM}	10:40 ^{AM} - 11:30 ^{AM}	11:40 ^{AM} - 12:30 ^{PM}	1:25 ^{PM} - 2:40 ^{PM}	2:50 ^{PM} - 3:40 ^{PM}	4:10 ^{PM} - 5:10 ^{PM}
TRACKS	KEYNOTE	SESSIONS	SESSIONS	SESSIONS	KEYNOTE	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	Tax Update: Flow-Through Entities Code: 209 CLE: 75 CFP: 1 EA: 1		State and Local Tax Update Code: 214 CLE: 75 CFP: 1	
Personal Development/ Human Capital	A Look Ahead at the U.S. Economy  LaVaughn Henry Code: 200 CFP: 15	3 Simple Ways to Ensure Your Employees Never Want to Leave Code: 202	The Art of Intentionally Saying No Code: 206	Sexual Harassment Prevention Training: Being Proactive and Accountable Code: 210	Maintaining Ethical Objectivity and Independence  Kathy Enstrom	Essential Strategies and Skills for Successful Negotiations Code: 215	REAL Leadership: Navigating Today's Workplace  LaTonya Wilkins Code: 218
Accounting and Auditing		ESG: Emerging Trends and Evolving Regulations Code: 203	The Successful Exit: Preparing for the Sale of a Business Code: 207	Accounting and Auditing for Small Businesses Code: 211	 Guinevere Moore Code: 213	Fraud Trends and Topics Code: 216	
Corporate Finance/Technology 		Secure Choice: Retirement Saving Options Code: 204	Optimizing Internal Controls: Focus on Value Code: 208	Finance Automation: A Roadmap to Sustainable Transformation Code: 212		Cybersecurity in the Age of AI Code: 217	
BREAK 10:15 ^{AM} - 10:40 ^{AM}							
BREAK 12:30 ^{PM} - 1:25 ^{PM}							
BREAK 3:40 ^{PM} - 4:10 ^{PM}							

Concurrent Educational Sessions



Tuesday
8.27.24

8.27.24 | 8:00 AM - 8:50 AM

KEYNOTE

The State of the CPA Profession: It's Time to Think Big

From talent acquisition and retention to professional relevance, the CPA profession faces big challenges—so it's time to think about big solutions. Join us as we dissect the trends impacting accounting and finance today and discuss the big ideas that could keep the profession moving forward.

Geoffrey Brown, CAE

President and CEO, Illinois CPA Society

Deborah Rood, CPA, MST

Chairperson, Illinois CPA Society and Risk Control Consulting Director, CNA Insurance

8.27.24 | 9:00 AM - 9:50 AM

Tax Insights for the Tax-Exempt World

Receive a comprehensive update on all the latest not-for-profit tax developments. Delve into key areas, such as tax-exempt status requirements, unrelated business income tax (UBIT), legislative updates, industry trends, and compliance best practices.

Jennifer Burke, CPA, MST

Tax Partner, Crowe LLP

Steve Lenivy, CPA

Managing Director, Crowe LLP

8.27.24 | 9:00 AM - 9:50 AM

Blueprint for Offshoring Success



Session Sponsor:

More and more firms are turning to offshoring to expand their teams and meet pressing capacity needs. But not all global teams are created equal. Discover the art of building a successful global team, including using rhythms and culture to boost morale. Plus, learn about the hottest technology tools to drive productivity and ensure security.

Shirley Koss

Director for Strategic Partnerships, TOA Global

8.27.24 | 9:00 AM - 9:50 AM

Accounting Update

Embark on a fast-paced journey through the most current hot topics in accounting and financial reporting. Leave equipped to provide a plain language executive summary of emerging issues in U.S. GAAP.

Jennifer Louis

President, Emergent Solutions Group

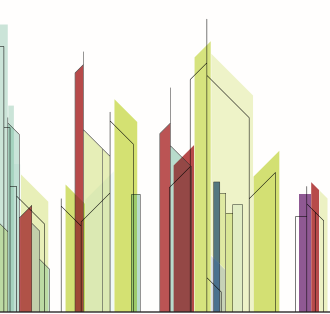
8.27.24 | 9:00 AM - 9:50 AM

Develop Insights to Improve Decision-Making

While reporting, and even some analysis, are becoming more automated, the one thing technology hasn't mastered yet is developing deep, meaningful insights from that data. Discover a systematic way to develop these insights to become a valued advisor who helps organizations solve difficult problems and improve their bottom lines.

John Sanchez

Business Coach and Managing Director,
The FPA Group



Concurrent Educational Sessions

8.27.24 | 10:15 AM - 11:05 AM

Navigating Tax Credits and Incentives for Maximum Business Advantage

Session Sponsor: **alliantgroup**

Recent legislative changes to tax credits and incentives present both opportunities and challenges for businesses across various industries. From federal tax credits and deductions to clean energy incentives and state-specific programs, gain valuable insights on leveraging these updates to maximize your clients' tax advantages and fuel their growth.

Rick Lazio

Former U.S. Congressman of New York, and Senior Vice President, alliantgroup

8.27.24 | 10:15 AM - 11:05 AM

Branding Illuminated

Shine a light on how to develop a compelling and authentic brand for both personal and professional success. Through real-world examples and practical tips, discover how to craft an impactful story to strategically showcase your skills and achievements.

Mollie Lo

CEO and Business Coach, LoTUS Mentoring

8.27.24 | 10:15 AM - 11:05 AM

Auditing Update

Delve into the major auditing and attestation changes. Discover the new professional and ethical requirements that need to be addressed in your workpapers to avoid peer review issues.

Jennifer Louis

President, Emergent Solutions Group

8.27.24 | 10:15 AM - 11:05 AM

Making Complex Ideas Easy to Understand

Accounting and finance professionals often need to communicate complex ideas in a way that's easy to understand, especially for people who lack a financial background. Uncover the common causes of complexity and discover specific tips to present complex information in a way that keeps your audience engaged.

John Sanchez

Business Coach and Managing Director, The FPA Group

8.27.24 | 11:15 AM - 12:05 PM

Human Capital Management: How to Best Engage and Retain Top Talent

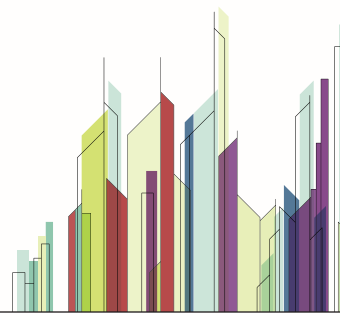
Turn the tide on decreasing employee retention trends by building a culture that proactively drives engagement and productivity. Learn how to spot, and prevent, employee burnout to keep your organization profitable and effectively moving forward.

Sirmara Campbell

Chief Human Resources Officer, LaSalle Network

KEYNOTE

Concurrent Educational Sessions



8.27.24 | 12:55 PM - 1:45 PM

Applying the New Tax Ethics Standards

Take a deep dive into the AICPA's newly revised Statements on Standards for Tax Services (SSTS), including standards that address the reliance on electronic tools and data protection. Using real case studies, discuss practical approaches to applying these tax ethics standards to your practice.

Luis Plascencia, CPA, MST

Principal, Luis V Plascencia, CPA

8.27.24 | 12:55 PM - 1:45 PM

Build a World-Class Learning Organization on a Budget

Level up your talent development and knowledge management by investing in your workforce with a comprehensive learning strategy. Examine the 70:20:10 learning model and discover how to implement it for improved learning engagement and execution.

Tammy Daugherty, M.Ed.

Business Consultant and Coach,
People Matter Consulting Ltd.

8.27.24 | 12:55 PM - 1:45 PM

Single Audit Update

Examine the impact of the 2024 Compliance Supplement on Single Audits, as well as the proposed changes to the Uniform Guidance. Plus, learn how to recognize and avoid the most common audit deficiencies found in Single Audits.

Melisa Galasso, CPA

Founder and CEO, Galasso Learning Solutions

8.27.24 | 12:55 PM - 1:45 PM

The Role of AI in the Workplace

In today's competitive job market, organizations are increasingly turning to artificial intelligence (AI) for every stage of the recruitment cycle. From automating candidate sourcing and resume screening to conducting predictive analysis for talent forecasting, discover how AI-driven tools can enhance decision-making, minimize bias, and streamline the recruitment process.

Karrie Sullivan

Founder and CEO, Culminate Strategy Group

8.27.24 | 1:55 PM - 2:45 PM

Opportunities in Estate Planning

Discuss the ins and outs of the estate planning process, including basic terminology and planning documents. Understand how to handle marriage, remarriage, and divorce, as well as recognize signs of undue influence that may thwart a client's true intentions.

Michael Ripani, CPA, JD, CFE

Senior Counsel, Handler Thayer LLP

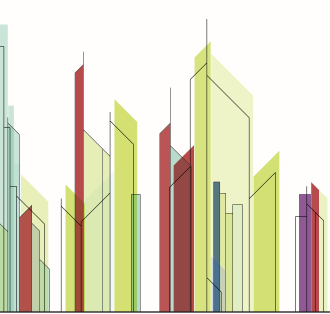
8.27.24 | 1:55 PM - 2:45 PM

Measure Your Ethics Through Change

New processes, technologies, and circumstances often necessitate changing ethical decisions. Learn to filter your decisions through a simple litmus test to ensure your actions are putting ethical principles into practice.

Tammy Daugherty, M.Ed.

Business Consultant and Coach,
People Matter Consulting Ltd.



Concurrent Educational Sessions

8.27.24 | 1:55 PM - 2:45 PM

Yellow Book Update

Get up to speed on the unique independence requirements in Generally Accepted Government Auditing Standards (GAGAS). Understand all the recent changes to quality management in the 2024 Yellow Book that are impacting government audit organizations and public accounting firms.

Melisa Galasso, CPA

Founder and CEO, Galasso Learning Solutions

8.27.24 | 1:55 PM - 2:45 PM

Anatomy of a Collaborative Budget Process

Budgeting, done the right way, can be a powerful tool to bring departments together and promote alignment on short-term goals and long-range strategies. But without a collaborative and well-designed process, budgets can turn into just another annual “to-do” item. Discuss effective preparation and execution processes that promote organizational buy-in and accountability.

Kim Szalkus, CPA

Vice President of Financial Planning and Analysis,
ReSource Pro

8.27.24 | 3:20 PM - 5:00 PM

KEYNOTE

Techs and Trends: 2024 Update

Accounting technology has gone through significant changes—from the advent of the personal computer to the internet to remote digital collaboration prompted by the pandemic. Now artificial intelligence has been added to the mix, accelerating change even more. Walk through an optimum accounting system infrastructure with specific equipment and application recommendations to keep your firm or company on the leading edge. Plus, hear an update on burgeoning cybersecurity threats and specific steps your organization should implement today.

Roman Kepczyk, CPA, CITP, CGMA, LSS BB

Director of Firm Technology Strategy, Rightworks

Wednesday

8.28.24

8.28.24 | 8:00 AM - 9:15 AM

KEYNOTE

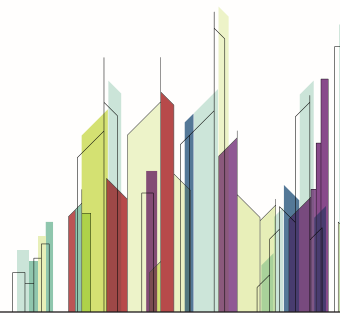
A Look Ahead at the U.S. Economy

The real state of our economic environment is buried in the details. Discuss current economic indicators—including GDP, production trends, consumer demand, market sentiment, and employment trends—to better understand what lies ahead. Plus, take a deep dive into the Federal Reserve’s monetary policy and its implications for interest rates and credit markets.

LaVaughn Henry, Ph.D., CBE

Former Senior Economist for the Council of Economic Advisers in the Executive Office of the President (the White House) and Senior Regional Officer and Vice President for the Federal Reserve Bank of Cleveland, Cincinnati Branch

Concurrent Educational Sessions



8.28.24 | 9:25 AM - 10:15 AM

Individual Tax Update

Get all your federal income tax questions answered at this insider look at recent tax court decisions and other developments and updates.

David Shiner, CPA, BSBA, JD, LLM

Shareholder, Leader of Tax and Employee Benefits Practice Group, Chuhak & Tecson PC

8.28.24 | 9:25 AM - 10:15 AM

3 Simple Ways to Ensure Your Employees Never Want to Leave

People are your most valuable asset, yet employee retention is becoming more challenging every day. Discover what employees really want but may never tell you. Explore what's missing when it comes to engagement and walk away with tips to help employees feel more connected to the work they do.

Susan Stutzel, CPA

Partner, PartnersCoach Inc.

8.28.24 | 9:25 AM - 10:15 AM

ESG: Emerging Trends and Evolving Regulations

Learn about the U.S., European, and global ESG regulations related to greenhouse gas emissions, climate risk, and broader sustainability topics. Explore how companies can prepare for sustainability reporting requirements while aligning regulatory compliance with business strategies and stakeholder priorities.

Matthew Pelton

Audit and Assurance Managing Director, Deloitte & Touche LLP

8.28.24 | 9:25 AM - 10:15 AM

Secure Choice: Retirement Saving Options

Uncover the nuts and bolts of the Illinois Secure Choice Savings Program, including the administrative responsibilities of a facilitating employer and options for program participants.

Christine Cheng

Executive Director of Secure Choice, Illinois State Treasurer's Office

8.28.24 | 10:40 AM - 11:30 AM

Business Tax Update

Discuss the latest congressional and IRS hot topics, including the proper treatment of Section 174 and recent developments impacting the Employee Retention Credit. Learn to identify a beneficial owner and the required FinCEN filings.

Mark Mirsky, CPA, MST

Partner, KRD Ltd.

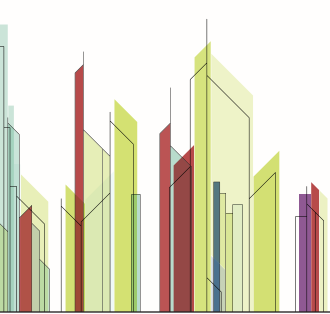
8.28.24 | 10:40 AM - 11:30 AM

The Art of Intentionally Saying No

Have you heard, "Say yes—it'll lead to more opportunities!"? While that may be true, saying yes also means saying no to something else. Learn how to use "no" as a complete sentence without sabotaging your career. Walk away with strategies to be more intentional about where you spend your time to increase your success and confidence as a leader.

Susan Stutzel, CPA

Partner, PartnersCoach Inc.



Concurrent Educational Sessions

8.28.24 | 10:40 AM - 11:30 AM

The Successful Exit: Preparing for the Sale of a Business

Explore the various strategies to optimize value when preparing a company for sale and identify the different types of buyers in the M&A market. Hint—they are not always limited to primary competitors. Plus, discuss the current market valuations for privately held businesses of various sizes.

Brian Lunt

Managing Director, Stevenson & Company

8.28.24 | 10:40 AM - 11:30 AM

Optimizing Internal Controls: Focus on Value

Optimizing internal controls is more than a simple “control rationalization” exercise. Learn how to create a comprehensive approach to embed controls into your organization’s operation, creating a reliable, efficient, systematic, and audit-ready process that increases value.

Jim Hannan, CPA

Founder, IFG Chicago’s Advisory Practice and Outsource Accounting Practices

8.28.24 | 11:40 AM - 12:30 PM

Tax Update: Flow-Through Entities

Identify commonly missed items in computing basis and at-risk limits for partnerships and S corporations, and learn the questions to ask clients to properly characterize debt and appropriately allocate on K-1s. Determine when K-2/K-3 forms are required to be filed and discuss other commonly overlooked situations.

Mark Mirsky, CPA, MST

Partner, KRD Ltd.

8.28.24 | 11:40 AM - 12:30 PM

Sexual Harassment Prevention Training: Being Proactive and Accountable

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, MS, MBA

Founder, Michael Gregory Consulting LLC

8.28.24 | 11:40 AM - 12:30 PM

Accounting and Auditing for Small Businesses

Receive an in-depth analysis of recently issued FASB Accounting Standards Updates affecting small businesses. Plus, hear how newly issued Statements on Auditing Standards and SSARS guidance will impact financial statement-related engagements.

Daryl Krause, CPA

Manager and CEO, DG Krause LLC

8.28.24 | 11:40 AM - 12:30 PM

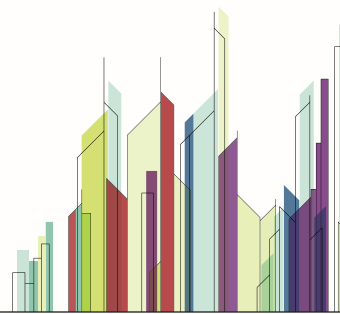
Finance Automation: A Roadmap to Sustainable Transformation

Despite advances in technology and the explosion of generative AI, accounting teams are still weighed down by innumerable, burdensome manual processes. Learn how to leverage and optimize technology to effectively reduce costs and risks while improving your organization’s performance.

Jim Hannan, CPA

Founder, IFG Chicago’s Advisory Practice and Outsource Accounting Practices

Concurrent Educational Sessions



KEYNOTE

8.28.24 | 1:25 PM - 2:40 PM

Maintaining Ethical Objectivity and Independence

Threats to independence are everywhere. Hear cautionary tales of when lines were crossed and learn what safeguards to put in place to stay independent. Plus, review guidance from the AICPA's Code of Professional Conduct and Circular 230 to help navigate relationships with clients while maintaining objectivity and integrity.

Kathy Enstrom, MBA, EA, CFE

Director of Investigations, Moore Tax Law Group LLC

Guinevere Moore, JD

Managing Member, Moore Tax Law Group LLC

8.28.24 | 2:50 PM - 3:40 PM

State and Local Tax Update

Receive a comprehensive overview of all the notable state tax updates for 2024. Learn to recognize the activities that may create a nexus for sales and income tax and understand how certain internet activities can create a state filing obligation.

Jamie Baker, CPA, CGMA

SALT Director, KRD Ltd.

8.28.24 | 2:50 PM - 3:40 PM

Essential Strategies and Skills for Successful Negotiations

Discover the key skills needed to excel in a negotiation. Take a detailed look at how soft, hard, and principled negotiators operate and approach a negotiation. Using real-world stories, drill down into six different negotiation models and leave with a pocket guide and checklist to help you determine which elements to consider.

Michael Gregory, MS, MBA

Founder, Michael Gregory Consulting LLC

8.28.24 | 2:50 PM - 3:40 PM

Fraud Trends and Topics

Take a deep dive into the latest fraud-related trends as identified by the Association of Certified Fraud Examiners' recent survey and consider their implications on internal controls and financial statement-related engagements.

Daryl Krause, CPA

Manager and CEO, DG Krause LLC

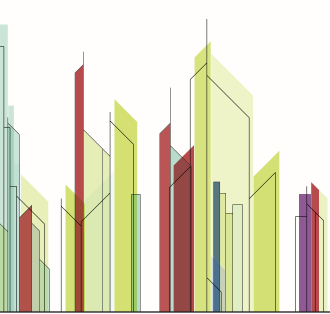
8.28.24 | 2:50 PM - 3:40 PM

Cybersecurity in the Age of AI

Explore the why behind cybersecurity issues, the methods being used by attackers, and how the use of artificial intelligence has shifted the threat landscape. Plus, discover the technology-related controls needed to secure information throughout your organizational environment.

Paul M. Perry, CPA, CITP, CDPSE, CISM

Member, Risk Advisory and Assurance Services, Warren Averett



Concurrent Educational Sessions

8.28.24 | 4:10 PM - 5:10 PM

KEYNOTE

REAL Leadership: Navigating Today's Workplace

The workplace is changing at an alarming rate—there are more generations in it than ever before, anxiety is at an all-time high, AI has arrived, and employees are working outside of a common space more than ever. All these changes (and more) have caused the traditional leadership approach to become obsolete. With a workforce that demands belonging, it's important for leaders to acknowledge the rapidly shifting landscape by getting below the surface within their teams. Learn how to fit the “REAL Leadership” approach into your own style and leave inspired with actionable steps.

LaTonya Wilkins, MBA

Founder and CEO, Change Coaches

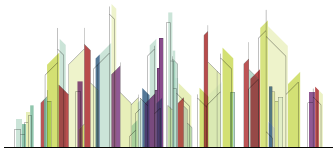
It's that time again!



Licensed CPAs in Illinois need 120 hours of CPE, including 4 hours of Ethics and 1 hour of Sexual Harassment Prevention Training.

To learn more, visit

www.icpas.org/licensing



REGISTRATION OPTIONS

✓	Date:	Option:	ICPAS M/NM:	Total:
<input type="checkbox"/>	8/27-28	2-Day Pass	\$495/\$595	\$ _____
<input type="checkbox"/>	8/27	Day One Pass	\$385/\$485	\$ _____
<input type="checkbox"/>	8/28	Day Two Pass	\$385/\$485	\$ _____
PLEASE SELECT ONE. I will be attending SUMMIT24: <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.

TUESDAY, AUGUST 27, 2024

✓	Code:	Time:	Title:	Field of Study:	Credits:
<input type="checkbox"/>	100	8:00 ^{AM} - 8:50 ^{AM}	Keynote: The State of the CPA Profession: It's Time to Think Big	Accounting	1 CPE
<input type="checkbox"/>	101	9:00 ^{AM} - 9:50 ^{AM}	Tax Insights for the Tax-Exempt World	Taxes	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	102	9:00 ^{AM} - 9:50 ^{AM}	Blueprint for Offshoring Success	Business Management & Organization	1 CPE
<input type="checkbox"/>	103	9:00 ^{AM} - 9:50 ^{AM}	Accounting Update	Accounting	1 CPE
<input type="checkbox"/>	104	9:00 ^{AM} - 9:50 ^{AM}	Develop Insights to Improve Decision-Making	Personal Development	1 CPE
<input type="checkbox"/>	105	10:15 ^{AM} - 11:05 ^{AM}	Navigating Tax Credits and Incentives for Maximum Business Advantage	Taxes	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	106	10:15 ^{AM} - 11:05 ^{AM}	Branding Illuminated	Personal Development	1 CPE
<input type="checkbox"/>	107	10:15 ^{AM} - 11:05 ^{AM}	Auditing Update	Auditing	1 CPE
<input type="checkbox"/>	108	10:15 ^{AM} - 11:05 ^{AM}	Making Complex Ideas Easy to Understand	Personal Development	1 CPE
<input type="checkbox"/>	109	11:15 ^{AM} - 12:05 ^{PM}	Keynote: Human Capital Management: How to Best Engage and Retain Top Talent	Personnel/Human Resources (.5) Behavioral Ethics (.5)	1 CPE
<input type="checkbox"/>	110	12:55 ^{PM} - 1:45 ^{PM}	Applying the New Tax Ethics Standards	Regulatory Ethics	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	111	12:55 ^{PM} - 1:45 ^{PM}	Build a World-Class Learning Organization on a Budget	Business Management & Organization	1 CPE
<input type="checkbox"/>	112	12:55 ^{PM} - 1:45 ^{PM}	Single Audit Update	Auditing	1 CPE
<input type="checkbox"/>	113	12:55 ^{PM} - 1:45 ^{PM}	The Role of AI in the Workplace	Information Technology	1 CPE

TUESDAY, AUGUST 27, 2024 (CONTINUED)

✓	Code:	Time:	Title:	Field of Study:	Credits:
<input type="checkbox"/>	114	1:55 ^{PM} - 2:45 ^{PM}	Opportunities in Estate Planning	Taxes	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	115	1:55 ^{PM} - 2:45 ^{PM}	Measure Your Ethics Through Change	Behavioral Ethics	1 CPE
<input type="checkbox"/>	116	1:55 ^{PM} - 2:45 ^{PM}	Yellow Book Update	Auditing	1 CPE
<input type="checkbox"/>	117	1:55 ^{PM} - 2:45 ^{PM}	Anatomy of a Collaborative Budget Process	Finance	1 CPE/1 CFP
<input type="checkbox"/>	118	3:20^{PM} - 5:00^{PM}	Keynote: Techs and Trends: 2024 Update	Information Technology	2 CPE

WEDNESDAY, AUGUST 28, 2024

✓	Code:	Time:	Title:	Field of Study:	Credits:
<input type="checkbox"/>	200	8:00^{AM} - 9:15^{AM}	Keynote: A Look Ahead at the U.S. Economy	Economics	1.5 CPE/1.5 CFP
<input type="checkbox"/>	201	9:25 ^{AM} - 10:15 ^{AM}	Individual Tax Update	Taxes	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	202	9:25 ^{AM} - 10:15 ^{AM}	3 Simple Ways to Ensure Your Employees Never Want to Leave	Personnel/Human Resources	1 CPE
<input type="checkbox"/>	203	9:25 ^{AM} - 10:15 ^{AM}	ESG: Emerging Trends and Evolving Regulations	Accounting	1 CPE
<input type="checkbox"/>	204	9:25 ^{AM} - 10:15 ^{AM}	Secure Choice: Retirement Saving Options	Specialized Knowledge	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}	The Art of Intentionally Saying No	Personal Development	1 CPE
<input type="checkbox"/>	207	10:40 ^{AM} - 11:30 ^{AM}	The Successful Exit: Preparing for the Sale of a Business	Accounting	1 CPE
<input type="checkbox"/>	208	10:40 ^{AM} - 11:30 ^{AM}	Optimizing Internal Controls: Focus on Value	Auditing	1 CPE
<input type="checkbox"/>	209	11:40 ^{AM} - 12:30 ^{PM}	Tax Update: Flow-Through Entities	Taxes	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	210	11:40 ^{AM} - 12:30 ^{PM}	Sexual Harassment Prevention Training: Being Proactive and Accountable	Personal Development, SHPT	1 CPE
<input type="checkbox"/>	211	11:40 ^{AM} - 12:30 ^{PM}	Accounting and Auditing for Small Businesses	Accounting (.5); Auditing (.5)	1 CPE
<input type="checkbox"/>	212	11:40 ^{AM} - 12:30 ^{PM}	Finance Automation: A Roadmap to Sustainable Transformation	Information Technology	1 CPE
<input type="checkbox"/>	213	1:25^{PM} - 2:40^{PM}	Keynote: Maintaining Ethical Objectivity and Independence	Regulatory Ethics	1.5 CPE
<input type="checkbox"/>	214	2:50 ^{PM} - 3:40 ^{PM}	State and Local Tax Update	Taxes	1 CPE/.75 CLE/1 CFP
<input type="checkbox"/>	215	2:50 ^{PM} - 3:40 ^{PM}	Essential Strategies and Skills for Successful Negotiations	Personal Development	1 CPE
<input type="checkbox"/>	216	2:50 ^{PM} - 3:40 ^{PM}	Fraud Trends and Topics	Auditing	1 CPE
<input type="checkbox"/>	217	2:50 ^{PM} - 3:40 ^{PM}	Cybersecurity in the Age of AI	Information Technology	1 CPE
<input type="checkbox"/>	218	4:10^{PM} - 5:10^{PM}	Keynote: REAL Leadership: Navigating Today's Workplace	Personal Development	1 CPE

REGISTRATION INFORMATION (PRE-REGISTER TODAY!)

Pre-Registration Process:

- Upon registering for SUMMIT24, attendees will receive an email confirmation.
- Starting August 14, 2024, all registered attendees will receive access to the SUMMIT24 portal.
- All attendees will receive an email the week prior to SUMMIT24 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.
- If you have questions or changes to your schedule, please call Member Services at 800.993.0407, option 2. No refunds will be given. Substitutions are permitted.

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www.icpas.org/summit

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Both pages with credit card information to 312.993.9432

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Both pages with check or credit card information to
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All program information is subject to change. 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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August 27-28, 2024

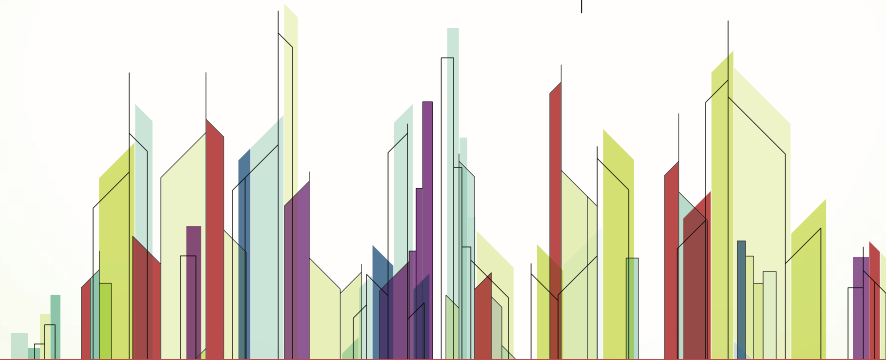
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