

WHAT'S



**In-Person and Virtual  
Options Available!**

Plus, One-Day Option and Pre-SUMMIT  
Workshop Also Available.

# ICPAS **SUMMIT**<sup>™</sup> 25

The Premier Event for Accounting and Finance Professionals<sup>™</sup>

**Explore the hottest topics from today's  
experts, all in one place!**



Wednesday-Thursday

**August 20-21, 2025**

Donald E. Stephens Convention Center, Rosemont, IL

**Register today at [www.icpas.org/summit](http://www.icpas.org/summit)**



ILLINOIS CPA SOCIETY®  
[www.icpas.org](http://www.icpas.org)

# ICPAS SUMMIT<sup>™</sup> 25

The Premier Event for Accounting and Finance Professionals<sup>™</sup>



## Expert General Session Speakers

Look forward and think ahead with insights from national thought leaders:

### The State of the CPA Profession: Staying Agile for What's Next



**Geoffrey Brown, CAE**  
President and CEO,  
Illinois CPA Society



**Brian Blaha, CPA**  
Chairperson, Illinois CPA Society  
and Managing Director,  
Winding River Consulting

### Get Your Head in the Game! Harnessing Your Mental Fitness



**Kristen Fox, MBA, PCC,  
CPCC, CPQC**  
Practice Leader, Coaching  
and Leadership  
Development, TalentRise

### Catch Me If You Can: Today's Pink Collar Criminal



**Kelly Paxton, CFE**  
Principal, K Paxton LLC

### The U.S. Economy: Labor Challenges and Solutions



**Jeffrey Korzenik**  
Chief Investment Strategist,  
Fifth Third Bank



**David Snyder**  
President and CEO,  
The Economic Club of Chicago

### Cultivating Creativity to Transform Your Career



**Liz Barhydt, CPA, CMA**  
CFO, Optimism

### The Evolving Technology Landscape



**Randy Johnston, MCS**  
Executive Vice President,  
K2 Enterprises



Navigate tomorrow's challenges with today's strategic insights and future-ready skills.

## Innovative Learning Tracks

Personalize your learning with four content tracks:

**Tax**

**Professional Development/Human Capital**

**Accounting and Auditing**

**Corporate Finance/Technology**

## CPE Credits and More

16 CPE hours, plus a variety of specialty credits, including:

**8 CLE** (pending) | **12.5 CFP** (pending) | **7 EA** (pending) | **3.5 Ethics**

### NEW THIS YEAR!



## NETWORKING RECEPTION

**Wednesday, August 20, 2025**  
**5:00PM - 6:00PM**

In-person attendees are invited to stay after the SUMMIT to connect and interact over light refreshments.

## Visionary Partner Solutions

Get hands-on with the latest products and services from leading partners like:

Accordance  
AICPA Member  
Insurance Programs  
Asure  
C&R Consulting  
GruntWorx  
Hollinden  
Inspire Outsource  
Intuit Accountants  
Karbon  
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Rightworks\*  
Robert Half  
SafeSend  
Sales Tax Institute/Yetter Tax

SAM Technology  
Shield IT Networks  
Thomson Reuters  
TOA Global  
Wolters Kluwer  
Tax & Accounting  
Wolters Kluwer  
CCH Incorporated  
Zenwork Tax1099

All partners will be available in person and virtually. As of 6.3.25.

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**PLEASE NOTE:** Program information is subject to change, verify upon registration. For recent speaker updates, visit [www.icpas.org/summit](http://www.icpas.org/summit).



# SUMMIT 25

The Premier Event for Accounting and Finance Professionals™

## DAY ONE AT-A-GLANCE

### Wednesday, August 20, 2025

8.20.25		8:00 <sup>AM</sup> - 8:50 <sup>AM</sup>	9:00 <sup>AM</sup> - 9:50 <sup>AM</sup>	10:15 <sup>AM</sup> - 11:05 <sup>AM</sup>	11:15 <sup>AM</sup> - 12:30 <sup>PM</sup>	1:25 <sup>PM</sup> - 2:15 <sup>PM</sup>	2:25 <sup>PM</sup> - 3:15 <sup>PM</sup>	3:45 <sup>PM</sup> - 5:00 <sup>PM</sup>
TRACKS	GENERAL SESSION	SESSIONS	SESSIONS	SESSIONS	GENERAL SESSION	SESSIONS	SESSIONS	GENERAL SESSION
Tax	 The State of the CPA Profession: Staying Agile for What's Next Geoffrey Brown Code: 100	Tax Ethics: Best Practices in SSTs Code: 101 CLE: 75 CFP: 1 EA: 1 Ethics: 1	Sales Tax Update: Illinois and Beyond Code: 105 CLE: 75 CFP: 1	 Get Your Head in the Game! Harnessing Your Mental Fitness Kristen Fox Code: 109	Business Tax Briefing: Key Updates, Insights, and Client Strategies Code: 110 CLE: 75 CFP: 1 EA: 1	Developments and Opportunities in International Tax Code: 114 CLE: 75 CFP: 1 EA: 1	Catch Me If You Can: Today's Pink Collar Criminal  Kelly Paxton Code: 118 Ethics: 1.5	BREAK   3:15 <sup>PM</sup> - 3:45 <sup>PM</sup>
		Psychological Safety: The Missing Link in Your Company Culture Code: 102	Embracing Creativity and Innovation in Accounting Code: 106					
Accounting and Auditing	 Advanced Concepts in Non-Audit Engagements Code: 103	Avoiding Auditing Deficiencies in Yellow Book and Single Audits Code: 107	The Transformative Role of AI in Accounting Code: 108	Beyond the Numbers: FP&A for Strategic Accountants Code: 113 CFP: 1	Transform Your Life in 30 Days With These Holistic Habits Code: 111	Leading the Future: Managing and Supporting Young Professionals Code: 115	Get Ready for the New Quality Management Standards Code: 116	BREAK   12:30 <sup>PM</sup> - 1:25 <sup>PM</sup>
		Hot Topics in Cryptocurrency Code: 104						
Corporate Finance/Technology								



# SUMMIT 25

The Premier Event for Accounting and Finance Professionals™

## DAY TWO AT-A-GLANCE

Thursday, August 21, 2025

8.21.25		8:00 <sup>AM</sup> - 9:15 <sup>AM</sup>	9:25 <sup>AM</sup> - 10:15 <sup>AM</sup>	10:40 <sup>AM</sup> - 11:30 <sup>AM</sup>	11:40 <sup>AM</sup> - 12:30 <sup>PM</sup>	1:25 <sup>PM</sup> - 2:15 <sup>PM</sup>	2:25 <sup>PM</sup> - 3:40 <sup>PM</sup>	4:10 <sup>PM</sup> - 5:00 <sup>PM</sup>
TRACKS	GENERAL SESSION	SESSIONS	SESSIONS	SESSIONS	GENERAL SESSION	SESSIONS	GENERAL SESSION	SESSIONS
Tax		Individual Tax Update Code: 201 CLE: .75 CFP: 1 EA: 1	The Ins and Outs of IRAs Code: 205 CLE: .75 CFP: 1 EA: 1			Rich and Famous in Illinois: Strategies for Working With High-Net-Worth Clients Code: 210 CLE: .75 CFP: 1 EA: 1		Revolutionizing Tax Advisory: Leveraging Technology to Drive Business Growth Code: 215 CLE: .75 CFP: 1 EA: 1 Session Sponsor:
Professional Development/ Human Capital	The U.S. Economy: Labor Challenges and Solutions  Jeffrey Korzenik	Navigating Conflicts and Difficult Conversations Code: 202	Earning Your Seat at the Leadership Table Code: 206			Make It Clear, Make It Count: Communication That Drives Action Code: 211 Session Sponsor:	The Evolving Technology Landscape  Randy Johnston Code: 214	Ethics and Privacy in AI Code: 216 Ethics: 1
Accounting and Auditing	Firm Acquisitions: Liability Risk Considerations for Buyers and Sellers Code: 203 CLE: .75 CFP: 1		Inside FASB's 2025 Agenda Code: 207			What's Happening at the AICPA Code: 212		Post Implementation Review Code: 217
Corporate Finance/Technology	Why Good Strategies Fail: The Four Keys to Organizational Effectiveness Code: 204		The Outsourcing Edge: CAS Advantages for Small- to Medium-Sized Businesses Code: 208			AI in Excel: ChatGPT, Copilot, or Both? Code: 213		AI Safety and Governance in the Workplace Code: 218



# Sessions



Tuesday | Pre-SUMMIT | Rosemont

## 8.19.25 **10:00 AM - 4:00 PM** Quality Management Workshop

Dive headfirst into the AICPA's Statements on Quality Management Standards and their implementation during this interactive workshop combining lecture, group discussion, and firm-specific work. You'll walk away not just with theory but with practical steps for developing and documenting your firm's quality management system.

**Heather Lindquist, CPA**

Director, Peer Review and Professional Standards, Peer Review Alliance, Illinois CPA Society

**Paul Pierson, CPA**

Senior Director, Peer Review and Professional Standards, Peer Review Alliance, Illinois CPA Society

Wednesday | Day One

## 8.20.25

**8.20.25 | 8:00 AM - 8:50 AM | Code: 100**

GENERAL SESSION

### The State of the CPA Profession: Staying Agile for What's Next

From new regulations and legislation to economic uncertainty, there's plenty of issues keeping CPAs on their toes as they try to serve their clients and companies. If this year has shown us anything so far, it's that being agile and adaptable is paramount. Join us as we dive into the changes, challenges, and trends impacting accounting and finance professionals today and discuss what's next as we steward the profession into the future.

**Geoffrey Brown, CAE**

President and CEO, Illinois CPA Society

**Brian Blaha, CPA**

Chairperson, Illinois CPA Society and Managing Director, Winding River Consulting

**8.20.25 | 9:00 AM - 9:50 AM | Code: 101**

### Tax Ethics: Best Practices in SSTs

Dive into the ethical standards relevant to performing tax services. Discuss the revised AICPA Statements on Standards for Tax Services (SSTs) and Circular 230 using engaging real-life examples.

**Luis Plascencia, CPA, MST**

CPA Practitioner/Principal, Luis V Plascencia, CPA

**8.20.25 | 9:00 AM - 9:50 AM | Code: 102**

### Psychological Safety: The Missing Link in Your Company Culture

A psychologically safe workplace promotes inclusivity, inspires creativity, builds trust, and improves team performance while helping employees manage stress—especially during times of change. While many firms struggle to prioritize psychological safety, those who do are seeing major benefits. Explore Google's findings on high-performing teams and learn practical strategies for applying this research to improve performance and retention in your firm.

**Erin Daiber, CPA**

CEO, Well Balanced Accountants



# Concurrent Educational Sessions

**8.20.25 | 9:00 AM - 9:50 AM | Code: 103**

## Advanced Concepts in Non-Audit Engagements

Get answers to your real-life non-audit questions and hear tips to minimize your quality control issues and professional liability risk. Examine the additional responsibilities between preparation engagements, compilations, and reviews. Explore the best practices for maintaining high-quality Statements on Standards for Accounting and Review Services engagements and learn how to analyze common peer review issues with agreed-upon procedure engagements.

**Jennifer Louis**

President, Emergent Solutions Group LLC

**8.20.25 | 9:00 AM - 9:50 AM | Code: 104**

## Hot Topics in Cryptocurrency

Hear an insightful discussion of the latest hot topics in today's fast-moving cryptocurrency arena.

**Shehan Chandrasekera, CPA**

Head of Tax Strategy, CoinTracker

**8.20.25 | 10:15 AM - 11:05 AM | Code: 105**

## Sales Tax Update: Illinois and Beyond

Receive a dynamic and timely overview of the most significant sales tax developments impacting businesses in Illinois and across the nation. Discuss key legislative and regulatory changes in the taxation of rentals and leases and compare how different states are approaching the taxation of digital advertising and products. Plus, assess the impact of recent nexus policy shifts on business operations, compliance obligations, and more.

**Diane L. Yetter, CPA, MST**

President and Founder, Yetter Consulting Services Inc., Sales Tax Institute

**8.20.25 | 10:15 AM - 11:05 AM | Code: 106**

## Embracing Creativity and Innovation in Accounting

It's time to fully embrace creative thinking in accounting and become the forward-thinking advisor that your clients, business partners, and teammates demand. Discover the importance of creative thinking in the field and learn techniques to sharpen your creative problem-solving skills. Leave with actionable tips, tricks, and techniques to transform yourself into the "go-to" person for new ideas and innovative solutions.

**Mike Manalac, CPA**

Accounting Manager, Google

**8.20.25 | 10:15 AM - 11:05 AM | Code: 107**

## Avoiding Auditing Deficiencies in Yellow Book and Single Audits

Gain the insights and tools you need to avoid peer review deficiencies in your audits. Delve into the precautions to take when performing a financial audit under Yellow Book or a compliance audit under Uniform Guidance. Discuss the most misapplied concepts to avoid when testing internal controls and compliance.

**Jennifer Louis**

President, Emergent Solutions Group LLC

**8.20.25 | 10:15 AM - 11:05 AM | Code: 108**

## The Transformative Role of AI in Accounting

Accountants are eager to use artificial intelligence (AI) tools to streamline tasks and save valuable time, but these tools can cause a ripple effect that goes beyond task automation throughout a firm. Examine the impact of AI on training needs and process adaptations within your firm. Discuss key considerations when introducing new tools and explore the implications for training programs, highlighting the necessity for upskilling in AI literacy, critical thinking, and more.

**Erin Daiber, CPA**

CEO, Well Balanced Accountants

# Concurrent Educational Sessions



**8.20.25 | 11:15 AM - 12:30 PM | Code: 109**

**GENERAL SESSION**

## Get Your Head in the Game! Harnessing Your Mental Fitness

Today's most effective leaders are like elite athletes, charting their visions of success, building high-performing teams, and setting challenging goals. Learn how to navigate uncertainty and stress as you hone your leadership skills by boosting your mental fitness and emotional intelligence. Find out how to actively shift from a negative to a positive mindset regardless of the obstacle and take away proven tools and tactics to help leverage these strengths.

**Kristen Fox, MBA, PCC, CPCC, CPQC**

Practice Leader, Coaching and Leadership Development, TalentRise

**8.20.25 | 1:25 PM - 2:15 PM | Code: 110**

## Business Tax Briefing: Key Updates, Insights, and Client Strategies

Discuss recent developments related to business tax and their impact on your clients. Explore updates from the United States Department of the Treasury and other legislative updates. Walk away with planning opportunities to present to your clients.

**Mark Mirsky, CPA, MST**

Partner, Aprio Advisory Group LLC

**8.20.25 | 1:25 PM - 2:15 PM | Code: 111**

## Transform Your Life in 30 Days With These Holistic Habits

Whether you're launching your career, leading a team, or planning your next chapter, discover how to bridge the gap between where you are now and where you want to be. Hear simple yet powerful habits to improve focus, reduce stress, and create more time for what matters most. Walk away with practical strategies to improve productivity, strengthen work-life balance, and align your daily actions with your long-term vision.

**Charlene Rhinehart, CPA, PMP, DTM**

Personal Finance Editor, GoodRx

**8.20.25 | 1:25 PM - 2:15 PM | Code: 112**

## The Rapid Emergence of AI in Auditing

AI is quickly reshaping the audit landscape. Explore practical applications of AI in external financial statement audits, from risk assessment and data analysis to testing and documentation. Gain insights into how AI tools can complement professional judgment, streamline workflows, and strengthen audit evidence. Dive into real-world examples and best practices for integration and learn how to maintain auditor responsibility and skepticism in an evolving technology environment.

**Megan Angle, CPA**

Partner, Porte Brown LLC

**8.20.25 | 1:25 PM - 2:15 PM | Code: 113**

## Beyond the Numbers: FP&A for Strategic Accountants

Financial planning and analysis (FP&A) isn't just for finance teams! Learn techniques for constructing dynamic business models that can integrate historical data, test assumptions, and translate intelligence into presentation-ready summaries. Whether you're supporting budgeting, forecasting, or scenario planning, discover how to deliver financial models that inform smarter business decisions.

**Carl Seidman, CPA, CSP**

Principal, Seidman Financial





# Concurrent Educational Sessions

**8.20.25 | 2:25 PM - 3:15 PM | Code: 114**

## Developments and Opportunities in International Tax

Track key developments in international tax rules and regulations. Explore export incentives for U.S. businesses. Hear strategies and tips to help foreign taxpayers invest in U.S. companies.

**Mark Mirsky, CPA, MST**

Partner, Aprio Advisory Group LLC

**Michael Campbell, CPA, MTax**

International Tax Director, Aprio Advisory Group LLC

**8.20.25 | 2:25 PM - 3:15 PM | Code: 115**

## Leading the Future: Managing and Supporting Young Professionals

Today's young professionals bring fresh perspectives, tech-savviness, and a desire for meaningful work—yet many supervisors struggle to manage and lead them effectively. Explore their values, workplace challenges, and expectations, and gain insights into how to help them thrive as managers to better engage, develop, and retain them during this lively panel discussion.

**Manal Ahmed**

Student & Diversity Outreach Specialist,  
Illinois CPA Society

**8.20.25 | 2:25 PM - 3:15 PM | Code: 116**

## Get Ready for the New Quality Management Standards

With the Dec. 15 effective date of the Statements on Quality Management Standards quickly approaching, learning the ins and outs of these standards is more critical than ever. Delve into questions about the design, documentation, implementation, and operation of your firm's quality management system while considering the impact of the standards on your day-to-day operations.

**Heather Lindquist, CPA**

Director, Peer Review and Professional Standards,  
Peer Review Alliance, Illinois CPA Society

**8.20.25 | 2:25 PM - 3:15 PM | Code: 117**

## Variance Analysis Insights and Implementation

Uncover the "why" behind the numbers and translate financial performance into meaningful insights with variance analysis! Explore how to structure variance reports, identify trends, and communicate actionable recommendations to leadership. Learn Excel shortcuts and leverage visualizations to highlight key deviations. Come away with a practical and implementation-ready approach to recurring reporting and correspondence.

**Carl Seidman, CPA, CSP**

Principal, Seidman Financial

**8.20.25 | 3:45 PM - 5:00 PM | Code: 118**

## Catch Me If You Can: Today's Pink Collar Criminal

Embezzlement is a crime hiding in plain sight, and it's often committed by long-term, trusted employees. Examine why this relatable and rapidly growing form of fraud is impacting organizations of all kinds. Learn how to spot the "pink flags," hear strategies for protecting your assets, and discover ways to ensure your most trusted team member isn't hiding a devastating secret.

**Kelly Paxton, CFE**

Principal, K Paxton LLC

GENERAL SESSION

# Concurrent Educational Sessions



Thursday | Day Two  
**8.21.25**

## GENERAL SESSION

**8.21.25 | 8:00 AM - 9:15 AM | Code: 200**

### The U.S. Economy: Labor Challenges and Solutions

Receive an update on the trajectory of the U.S. economy with a focus on labor challenges and solutions. Discuss the direction of the Federal Reserve and the impact of government policies on trade, tax, and spending.

**Jeffrey Korzenik**

Chief Investment Strategist, Fifth Third Bank

**David Snyder**

President and CEO, The Economic Club of Chicago

**8.21.25 | 9:25 AM - 10:15 AM | Code: 201**

### Individual Tax Update

Discuss tax regulations and recent changes while discovering new strategies to help mitigate tax implications your clients may be facing.

**Sali L. Sheafor, CPA**

Member, TAP Consulting LLC

**8.21.25 | 9:25 AM - 10:15 AM | Code: 202**

### Navigating Conflicts and Difficult Conversations

In today's dynamic work environments, navigating conflicts and handling difficult conversations with grace and professionalism are invaluable skills. Whether you're a manager or team member, conflicts and challenging discussions are a part of professional life. Equip yourself with the tools and strategies to effectively manage and resolve conflicts, fostering a more harmonious and productive workplace.

**Susan Stutzel, CPA**

Partner, PartnersCoach Inc.

**8.21.25 | 9:25 AM - 10:15 AM | Code: 203**

### Firm Acquisitions: Liability Risk Considerations for Buyers and Sellers

Whether you're a buyer or seller of a CPA firm, or considering a private equity investment, there are risk considerations that can't be ignored. Learn the pitfalls to avoid as you venture into transaction territory.

**Stan Sterna, JD**

Risk Control Leader, Aon

**Sarah Ference, CPA**

Risk Control Director, CNA Insurance

**8.21.25 | 9:25 AM - 10:15 AM | Code: 204**

### Why Good Strategies Fail: The Four Keys to Organizational Effectiveness

Unlock organizational effectiveness to drive long-term growth by focusing on four key elements: operating model/structure, skills, talent, and talent effectiveness. Together, these components empower organizations to not only design effective strategies but also execute them successfully, ensuring a framework for sustained growth and adaptability in an ever-evolving landscape.

**Dwain Young, Jr., PHR**

Director, Protiviti



# Concurrent Educational Sessions

**8.21.25 | 10:40 AM - 11:30 AM | Code: 205**

## The Ins and Outs of IRAs

Putting money into retirement isn't as easy as making a deposit. The options for planning ahead seem endless as we scour through the many types of accounts and work to ensure penalties stay at bay. Hear tips for maximizing your retirement funds, including when to watch for Medicare in tax planning and when to consider a back-door Roth IRA conversion.

**Sali L. Sheafor, CPA**

Member, TAP Consulting LLC

**8.21.25 | 10:40 AM - 11:30 AM | Code: 206**

## Earning Your Seat at the Leadership Table

How do we get invited to have a seat at the table? Don't fake it till you make it—develop the skills to lead with confidence as your authentic self. Understand the micromessages you're sending and walk away with the strategies you need to step up, stand out, and confidently earn your seat at the leadership table.

**Susan Stutzel, CPA**

Partner, PartnersCoach Inc.

**8.21.25 | 10:40 AM - 11:30 AM | Code: 207**

## Inside FASB's 2025 Agenda

This year, the Financial Accounting Standards Board (FASB) is finishing priority projects and looking to the future. Discuss what you need to know about new and upcoming standards, hear the latest on post-implementation reviews, examine the feedback received from the 2025 comment periods, and discover how your continued input on projects and initiatives informs the board's cost-benefit analysis to ensure standards are effective and operable.

**Hillary Salo, CPA**

Vice Chair, Financial Accounting Standards Board

**8.21.25 | 10:40 AM - 11:30 AM | Code: 208**

## The Outsourcing Edge: CAS Advantages for Small- to Medium-Sized Businesses

As technology evolves rapidly and staffing shortages persist, small- and medium-sized businesses (SMBs) are increasingly turning to outsourced financial support. Explore how client accounting services (CAS) practices can strategically position themselves to offer sustainable solutions for the pain points SMB clients are experiencing today.

**Seth Hopkins**

Director, Forvis Mazars US

**8.21.25 | 11:40 AM - 12:30 PM | Code: 209**

## Cultivating Creativity to Transform Your Career

In today's data-driven, automated world, the most impactful finance and accounting professionals aren't just technically strong—they're strategic thinkers, storytellers, and problem-solvers who leverage creativity to drive business decisions. Through real-world examples and actionable insights, challenge the idea that creativity and accounting are mutually exclusive and explore ways to elevate your career and add value to your organization.

**Liz Barhydt, CPA, CMA**

CFO, Optimism

GENERAL SESSION

# Concurrent Educational Sessions



**8.21.25 | 1:25 PM - 2:15 PM | Code: 210**

## Rich and Famous in Illinois: Strategies for Working With High-Net-Worth Clients

Every new client is an adrenaline rush, but if it's a high-profile or high-net-worth client, it's even more exciting—until a dispute arises. Learn why working with the rich and famous may result in expensive and time-consuming claims and hear strategies for reducing the impact on your firm.

**Deborah K. Rood, CPA, MST**


Risk Control Consulting Director, CNA Insurance

**Jeremy Dubow, CPA, MST**

Tax Partner, Prosperity Partners LLC

**8.21.25 | 1:25 PM - 2:15 PM | Code: 211**

## Make It Clear, Make It Count: Communication That Drives Action

Session Sponsor: 

Sharpen your communication style, strengthen your messaging, and leverage AI tools like ChatGPT to improve clarity and save yourself time. Learn how to lead with intent, motivate your team, and ensure your message cuts through the noise—whether you're writing a client email, delivering performance feedback, or preparing a firmwide announcement. Walk away with communication tactics and resources you can implement immediately.

**Christine M. Hollinden, CPSM, CEPA, CVGA, CM&AA**

Partner, Hollinden

**8.21.25 | 1:25 PM - 2:15 PM | Code: 212**

## What's Happening at the AICPA

The AICPA is buzzing with activity in 2025—stay ahead of the curve with a comprehensive overview of what's happening. Explore the new quality management standards becoming effective this year and their impact on practice management. Dive into the latest Auditing Standards Board proposals, then close with a quick review of Statements on Auditing Standards No. 149 for group audits, which will be effective next year.

**Melisa Galasso, CPA**

Founder and CEO, Galasso Learning Solutions

**8.21.25 | 1:25 PM - 2:15 PM | Code: 213**

## AI in Excel: ChatGPT, Copilot, or Both?

Gain a competitive edge! Walk through integrating AI tools like Microsoft 365 Copilot and ChatGPT into Excel to enhance your productivity. Dive deep into Microsoft's security, compliance, privacy, and responsible AI principles, and discuss practical uses of Copilot, ChatGPT, and other plugins in daily workflows to streamline tasks and improve overall efficiency.

**Randy Johnston, MCS**

Executive Vice President, K2 Enterprises

**8.21.25 | 2:25 PM - 3:40 PM | Code: 214**

## The Evolving Technology Landscape

Delve into today's technology landscape and its implications for the accounting sector. Learn which trends are worth monitoring and examine the proper hardware and software for your strategic and tactical plans. Explore the influence of AI, quantum computing, software as a service, and productivity suites like Microsoft 365. Leave with actionable insights on how to maximize your return on investment.

**Randy Johnston, MCS**

Executive Vice President, K2 Enterprises

GENERAL SESSION



# Concurrent Educational Sessions

**8.21.25 | 4:10 PM - 5:00 PM | Code: 215**

## Revolutionizing Tax Advisory: Leveraging Technology to Drive Business Growth

Session Sponsor:  **Wolters Kluwer**

Join us for an engaging workshop on best practices to deliver strategic advisory services. Learn how advanced technology can help your firm drive revenue growth and elevate client service.

**Betty Ross**

Director, Product Management, Wolters Kluwer

**8.21.25 | 4:10 PM - 5:00 PM | Code: 216**

## Ethics and Privacy in AI

Since its emergence in 2022, generative AI has transformed industries, but rapid adoption has raised concerns about data misuse and confidentiality. As AI regulations tighten, it's critical to establish ethical guidelines, but complex terms of service and end-user license agreements are often overlooked. Learn how to demystify these agreements and develop and enforce principles addressing privacy and the responsible use of AI.

**Randy Johnston, MCS**

Executive Vice President, K2 Enterprises

**8.21.25 | 4:10 PM - 5:00 PM | Code: 217**

## Post Implementation Review

Discuss the impacts of recent AICPA and FASB activities. Get started with a review of current expected credit loss and other recent standard-setting to address implementation issues, then assess the impact of Statement on Auditing Standards No. 145, and hear insights from peer review.

**Melisa Galasso, CPA**

Founder and CEO, Galasso Learning Solutions

**8.21.25 | 4:10 PM - 5:00 PM | Code: 218**

## AI Safety and Governance in the Workplace

AI is a hot topic in nearly every industry, but with significant upside comes substantial risk—fraud, bias, data security, and internet protocol (IP) issues. By 2026, municipal, state, federal, and international regulations will be in place regarding the safe use of AI and will require organizations to implement robust governance practices. Discuss the steps you should take to safeguard your organization's interests in this fast-moving era of innovation.

**John Rood**

President, Proceptual Inc



# Mark Your Calendar!

ICPAS conferences help you stay current on the latest updates and uncover strategies that will help you navigate the ever-changing accounting and finance landscape.



For full conference details or to register, visit  
[www.icpas.org/conferences](http://www.icpas.org/conferences)





ICPAS

**SUMMIT™ 25**

The Premier Event for Accounting and Finance Professionals™

# REGISTRATION

## REGISTRATION OPTIONS

✓	Date:	Option:	ICPAS M/NM:	Total:
<input type="checkbox"/>	8/19	Pre-SUMMIT Workshop	\$315/\$345	\$ _____
<input type="checkbox"/>	8/20-21	2-Day Pass	\$505/\$605	\$ _____
<input type="checkbox"/>	8/20	Day One Pass	\$395/\$495	\$ _____
<input type="checkbox"/>	8/21	Day Two Pass	\$395/\$495	\$ _____
<b>PLEASE SELECT ONE. I will be attending SUMMIT25:</b> <input type="checkbox"/> <b>IN PERSON</b> <input type="checkbox"/> <b>VIRTUALLY</b>			<b>TOTAL ENCLOSED:</b>	\$ _____

## 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.**

## WEDNESDAY, AUGUST 20, 2025

✓	Code:	Time:	Title:	Field of Study:	Credits:
<input type="checkbox"/>	100	8:00 <sup>AM</sup> - 8:50 <sup>AM</sup>	General Session: The State of the CPA Profession: Staying Agile for What's Next	Accounting	1 CPE
<input type="checkbox"/>	101	9:00 <sup>AM</sup> - 9:50 <sup>AM</sup>	Tax Ethics: Best Practices in SSTs	Regulatory Ethics	1 CPE/.75 CLE/1 CFP/1 EA/1 Ethics
<input type="checkbox"/>	102	9:00 <sup>AM</sup> - 9:50 <sup>AM</sup>	Psychological Safety: The Missing Link in Your Company Culture	Personnel/Human Resources	1 CPE
<input type="checkbox"/>	103	9:00 <sup>AM</sup> - 9:50 <sup>AM</sup>	Advanced Concepts in Non-Audit Engagements	Auditing	1 CPE
<input type="checkbox"/>	104	9:00 <sup>AM</sup> - 9:50 <sup>AM</sup>	Hot Topics in Cryptocurrency	Information Technology	1 CPE
<input type="checkbox"/>	105	10:15 <sup>AM</sup> - 11:05 <sup>AM</sup>	Sales Tax Update: Illinois and Beyond	Taxes	1 CPE/.75 CLE/1 CFP
<input type="checkbox"/>	106	10:15 <sup>AM</sup> - 11:05 <sup>AM</sup>	Embracing Creativity and Innovation in Accounting	Personal Development	1 CPE
<input type="checkbox"/>	107	10:15 <sup>AM</sup> - 11:05 <sup>AM</sup>	Avoiding Auditing Deficiencies in Yellow Book and Single Audits	Auditing (Government/Yellow Book)	1 CPE
<input type="checkbox"/>	108	10:15 <sup>AM</sup> - 11:05 <sup>AM</sup>	The Transformative Role of AI in Accounting	Personnel/Human Resources	1 CPE
<input type="checkbox"/>	109	11:15 <sup>AM</sup> - 12:30 <sup>PM</sup>	General Session: Get Your Head in the Game! Harnessing Your Mental Fitness	Personal Development	1.5 CPE
<input type="checkbox"/>	110	1:25 <sup>PM</sup> - 2:15 <sup>PM</sup>	Business Tax Briefing: Key Updates, Insights, and Client Strategies	Taxes	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	111	1:25 <sup>PM</sup> - 2:15 <sup>PM</sup>	Transform Your Life in 30 Days With These Holistic Habits	Personal Development	1 CPE
<input type="checkbox"/>	112	1:25 <sup>PM</sup> - 2:15 <sup>PM</sup>	The Rapid Emergence of AI in Auditing	Auditing	1 CPE
<input type="checkbox"/>	113	1:25 <sup>PM</sup> - 2:15 <sup>PM</sup>	Beyond the Numbers: FP&A for Strategic Accountants	Finance	1 CPE/1 CFP
<input type="checkbox"/>	114	2:25 <sup>PM</sup> - 3:15 <sup>PM</sup>	Developments and Opportunities in International Tax	Taxes	1 CPE/.75 CLE/1 CFP/1 EA



## WEDNESDAY, AUGUST 20, 2025

✓	Code:	Time:	Title:	Field of Study:	Credits:
<input type="checkbox"/>	115	2:25 <sup>PM</sup> - 3:15 <sup>PM</sup>	Leading the Future: Managing and Supporting Young Professionals	Personnel/Human Resources	1 CPE
<input type="checkbox"/>	116	2:25 <sup>PM</sup> - 3:15 <sup>PM</sup>	Get Ready for the New Quality Management Standards	Auditing	1 CPE
<input type="checkbox"/>	117	2:25 <sup>PM</sup> - 3:15 <sup>PM</sup>	Variance Analysis Insights and Implementation	Finance	1 CPE/1 CFP
<input type="checkbox"/>	<b>118</b>	<b>3:45<sup>PM</sup> - 5:00<sup>PM</sup></b>	<b>General Session: Catch Me If You Can: Today's Pink Collar Criminal</b>	<b>Behavioral Ethics</b>	<b>1.5 CPE/1.5 Ethics</b>

## THURSDAY, AUGUST 21, 2025

✓	Code:	Time:	Title:	Field of Study:	Credits:
<input type="checkbox"/>	<b>200</b>	<b>8:00<sup>AM</sup> - 9:15<sup>AM</sup></b>	<b>General Session: The U.S. Economy: Labor Challenges and Solutions</b>	<b>Economics</b>	<b>1.5 CPE/1.25 CLE/1.5 CFP</b>
<input type="checkbox"/>	201	9:25 <sup>AM</sup> - 10:15 <sup>AM</sup>	Individual Tax Update	Taxes	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	202	9:25 <sup>AM</sup> - 10:15 <sup>AM</sup>	Navigating Conflicts and Difficult Conversations	Personal Development	1 CPE
<input type="checkbox"/>	203	9:25 <sup>AM</sup> - 10:15 <sup>AM</sup>	Firm Acquisitions: Liability Risk Considerations for Buyers and Sellers	Business Management & Organization	1 CPE/.75 CLE/1 CFP
<input type="checkbox"/>	204	9:25 <sup>AM</sup> - 10:15 <sup>AM</sup>	Why Good Strategies Fail: The Four Keys to Organizational Effectiveness	Business Management & Organization	1 CPE
<input type="checkbox"/>	205	10:40 <sup>AM</sup> - 11:30 <sup>AM</sup>	The Ins and Outs of IRAs	Taxes	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	206	10:40 <sup>AM</sup> - 11:30 <sup>AM</sup>	Earning Your Seat at the Leadership Table	Personal Development	1 CPE
<input type="checkbox"/>	207	10:40 <sup>AM</sup> - 11:30 <sup>AM</sup>	Inside FASB's 2025 Agenda	Accounting	1 CPE
<input type="checkbox"/>	208	10:40 <sup>AM</sup> - 11:30 <sup>AM</sup>	The Outsourcing Edge: CAS Advantages for Small- to Medium-Sized Businesses	Business Management & Organization	1 CPE
<input type="checkbox"/>	<b>209</b>	<b>11:40<sup>AM</sup> - 12:30<sup>PM</sup></b>	<b>General Session: Cultivating Creativity to Transform Your Career</b>	<b>Personal Development</b>	<b>1 CPE</b>
<input type="checkbox"/>	210	1:25 <sup>PM</sup> - 2:15 <sup>PM</sup>	Rich and Famous in Illinois: Strategies for Working With High-Net-Worth Clients	Specialized Knowledge	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	211	1:25 <sup>PM</sup> - 2:15 <sup>PM</sup>	Make It Clear, Make It Count: Communication That Drives Action	Personal Development	1 CPE
<input type="checkbox"/>	212	1:25 <sup>PM</sup> - 2:15 <sup>PM</sup>	What's Happening at the AICPA	Auditing	1 CPE
<input type="checkbox"/>	213	1:25 <sup>PM</sup> - 2:15 <sup>PM</sup>	AI in Excel: ChatGPT, Copilot, or Both?	Information Technology	1 CPE
<input type="checkbox"/>	<b>214</b>	<b>2:25<sup>PM</sup> - 3:40<sup>PM</sup></b>	<b>General Session: The Evolving Technology Landscape</b>	<b>Information Technology</b>	<b>1.5 CPE</b>
<input type="checkbox"/>	215	4:10 <sup>PM</sup> - 5:00 <sup>PM</sup>	Revolutionizing Tax Advisory: Leveraging Technology to Drive Business Growth	Taxes	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	216	4:10 <sup>PM</sup> - 5:00 <sup>PM</sup>	Ethics and Privacy in AI	Behavioral Ethics	1 CPE/1 Ethics
<input type="checkbox"/>	217	4:10 <sup>PM</sup> - 5:00 <sup>PM</sup>	Post Implementation Review	Auditing	1 CPE
<input type="checkbox"/>	218	4:10 <sup>PM</sup> - 5:00 <sup>PM</sup>	AI Safety and Governance in the Workplace	Information Technology	1 CPE

## REGISTRATION INFORMATION (PRE-REGISTER TODAY!)

### Pre-Registration Process:

- Upon registering for SUMMIT25, attendees will receive an email confirmation.
- Starting August 13, 2025, all registered attendees will receive access to the SUMMIT25 portal.
- All attendees will receive an email the week prior to SUMMIT25 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.

### WEBSITE:

[www.icpas.org/summit](http://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**



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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Wednesday-Thursday

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