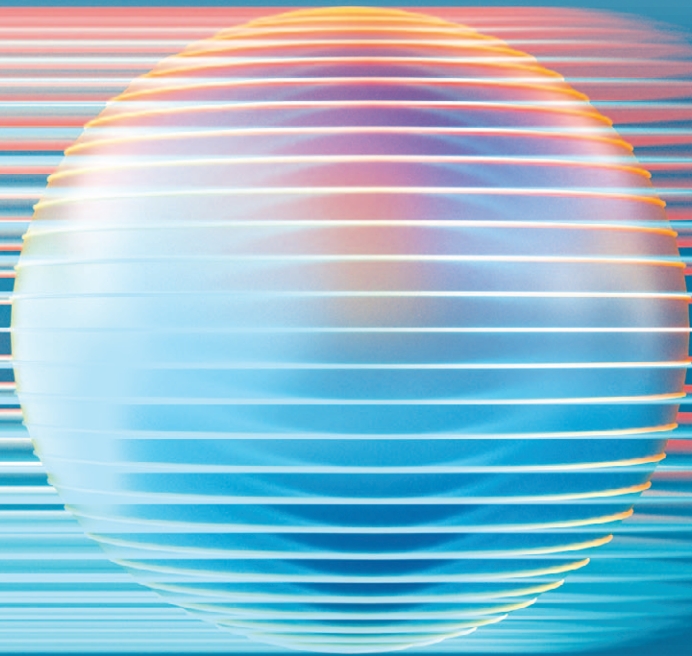


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and Tomorrow



Thomas B. Murtagh, CPA, MBA, JD, LLM

Chairperson, Illinois CPA Society, and Partner,
BKD CPAs & Advisors



Todd Shapiro

President and CEO, Illinois CPA Society

Transcending Technology:
Ensuring Relevance in an
Automated World



Donny C. Shimamoto, CPA.CITP, CGMA

Founder and Managing Director,
IntrapriseTechKnowlogies LLC

Eyeing Our Economy



Derek Sasveld, CFA

Senior Investment Strategist, BMO Global
Asset Management

When Was the Last Time You
Told a Really Good Story?



Nykia Wright, MBA

CEO, Chicago Sun-Times



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



SUMMIT 21
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DAY ONE AT-A-GLANCE

Tuesday, August 24, 2021

8.24.21	8:00 AM - 9:15 AM	9:15 AM - 10:00 AM	10:00 AM - 10:50 AM	11:00 AM - 11:50 AM	11:50 AM - 12:50 PM	12:50 PM - 1:40 PM	1:50 PM - 2:40 PM	2:40 PM - 3:30 PM	3:30 PM - 4:20 PM	4:30 PM - 5:45 PM
TRACKS	KEYNOTE	BREAK	SESSIONS	SESSIONS	BREAK	SESSIONS	SESSIONS	BREAK	SESSIONS	KEYNOTE
Tax			Individual Tax Update Code: 101 CLE: .75 CFP: 1 EA: 1	Business Tax Update Code: 106 CLE: .75 CFP: 1 EA: 1		Best Practices for Defending an IRS Exam: Practice Tips Code: 111 CLE: .75 CFP: 1 EA: 1	Tangible Property Repair Regulations Code: 116 CLE: .75 CFP: 1 EA: 1		Illinois and Beyond! Multi-State Tax Update Code: 121 CLE: .75 CFP: 1	
Accounting & Auditing			Attestation Engagements Code: 102	Auditing Remotely Code: 107		FASB Update Code: 112	Single Audit Update Code: 117 Yellow Book: 1		Fair Value Accounting: Impact on Financial Statements Code: 122	
Ethics/Personal Development F.V.L.D. <small>www.fvld.com</small>	The State of the CPA Profession – Today and Tomorrow Thomas B. Murtagh Todd Shapiro Code: 100		How Great Leaders Find Certainty in Uncertainty Code: 103	Ethical Leadership: Principles and Practices Code: 108 Ethics: 1 CLE: .75		How to Be a Networking Ninja in a Virtual Environment Code: 113	How the ABCD of the Digital Age Impacts Corporate Ethics Code: 118 Ethics: 1 CLE: .75		Do You Have Executive Presence? Code: 123	Transcending Technology: Ensuring Relevance in an Automated World Donny Shimamoto Code: 126
Corporate Strategy/ Human Capital <small>Corporate Financial Leadership</small>			How to Hire, Train, and Retain Top Talent Code: 104	Budgeting and Forecasting in Uncertain Times Code: 109 CFP: 1		Balanced Scorecard and KPIs Code: 114	Data Readiness Assessment Model: Is Your Organization Ready? Code: 119		Ten Tips for Small Business Employment Compliance Code: 124	
Technology Solutions/Advisory Services			Establishing and Maintaining Fiduciary Relationships Code: 105	Sell Your Brain, Not Your Time: Subscription Pricing for Professionals Code: 110		How to Manage and Run a Virtual Tax Season Code: 115	Navigating the Next 12 Months: Creating a Foundation for Enduring Success Code: 120		AI and Machine Learning: The Impact on Accounting and Finance Code: 125	



8:25-21	8:00 ^{AM} - 9:15 ^{AM}	9:15 ^{AM} - 10:00 ^{AM}	10:00 ^{AM} - 10:50 ^{AM}	11:00 ^{AM} - 11:50 ^{AM}	11:50 ^{AM} - 12:50 ^{PM}	12:50 ^{PM} - 1:40 ^{PM}	1:50 ^{PM} - 2:40 ^{PM}	2:40 ^{PM} - 3:30 ^{PM}	3:30 ^{PM} - 4:20 ^{PM}	4:30 ^{PM} - 5:45 ^{PM}
TRACKS	KEYNOTE	BREAK	SESSIONS	SESSIONS	BREAK	SESSIONS	SESSIONS	BREAK	SESSIONS	KEYNOTE
Tax			Nuts and Bolts of Cryptocurrency Taxation Code: 201 CLE: .75 CFP: 1 EA: 1	Transfer Pricing After Tax Reform Code: 206 CLE: .75 CFP: 1 EA: 1		Flow-Through Hot Topics Code: 211 CLE: .75 CFP: 1 EA: 1	Research and Development Tax Credit Fundamentals Code: 216 CLE: .75 CFP: 1 EA: 1		A Year in Tax for Exempt Organizations Code: 221 CLE: .75 CFP: 1 EA: 1	
Accounting & Auditing			2021 Auditing Update Code: 202	Get Ready for the Lease Standard Code: 207		Digital Asset Accounting Code: 212	Audit Documentation: Quality and the Questioning Mind Code: 217		Evaluating Going Concern Issues Code: 222	
Ethics/Personal Development F.V.L.D. <small>www.fvld.com</small>	Eying Our Economy Derek Sasvold Code: 200 CFP: 15		Not-for-Profit Corporate Governance Code: 203 CLE: .75	Mission Critical Leadership: How Smart Managers Lead Well in All Directions Code: 208		Managing the Risks and Ethical Responsibilities of Benefit Plan Fraud in a COVID-19 Environment Code: 213 Ethics: 1 CLE: .75	Bye-Bye Bias: The Ethics of Creating a Bias-Free Workplace Code: 218 Ethics: 1 CLE: .75		Preventing and Investigating Sexual and Other Harassment in a #MeToo World Code: 223 CLE: .75 SHPT: 1*	When Was the Last Time You Told a Really Good Story? Nyka Wright Code: 226
Corporate Strategy/ Human Capital <small>Center for Corporate Financial Leadership</small>			One Simple Question to Spark Innovation and Growth Code: 204	Advanced Strategies for Health Savings Accounts Code: 209		Gender Parity in the Time of COVID Code: 214	Helping You Be a Better Manager: The Importance of Documentation Code: 219		Driving Business Process Improvements Code: 224	
Technology Solutions/Advisory Services			Technology Solutions for the Modern Workplace Code: 205	RPA Implementation Best Practices Code: 210		Be More Valuable to Your Clients Code: 215	Next-Gen Transitioning: Building a Sustainable and Transferable Firm Code: 220		Harassing Technology and Remaining Relevant in the Digital Age Code: 225	

*Sexual Harassment Prevention Training



Optional Pre-SUMMIT21

Workshops

Monday

8.23.21

The pre-conference workshops will only be offered virtually.
No in-person option is available.


Please note: The workshops are optional and require a separate registration.


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 tax return filing requirements.

Plus, identify potential planning and consulting opportunities.


Lee Arbus, CPA, JD, LLM | Partner, Levun, Goodman & Cohen, LLP 


Jonathan Beer, JD, LLM | Attorney, Levun, Goodman & Cohen, LLP 

1:00 PM - 4:30 PM | CONCURRENT WORKSHOP II

Practice Challenges in a COVID-19 World


Discuss how the pandemic has changed the way firms operate and how CPAs represent clients in front of the IRS. Hear best practices for work-from-home policies and procedures, technology utilization, data security and more. Plus, receive insights on how to utilize the Taxpayer Advocate Service to help resolve taxpayer problems.

Mark S. Heroux, JD | Partner, Baker Tilly Virchow Krause LLP 

Phillip Levsky, CPA | Senior Manager - Tax, FGMK, LLC 

Luis Plascencia, CPA, MST | Principal, Luis V Plascencia CPA 

Andrew J. VanSingel, Esq. | Local Taxpayer Advocate, Taxpayer Advocate Service 

Jennifer Williams, CPA | Principal/Owner, Pillar Financial Services 

 = Remote Speaker



Tuesday

8.24.21

KEYNOTE

8:00 AM - 9:15 AM

The State of the CPA Profession – Today and Tomorrow

Hear about the many issues impacting the CPA profession today, including changes in the CPA exam, declining number of new CPAs, and challenges with diversity and inclusion. We'll also discuss how we ensure our relevance moving forward as technology continues to impact our core services, highlighting the need for CPAs to become strategic business advisors.

Thomas B. Murtagh, CPA, MBA, JD, LLM

Chairperson, Illinois CPA Society, Partner, BKD CPAs & Advisors

Todd Shapiro

President and CEO, Illinois CPA Society

10:00 AM - 10:50 AM

Individual Tax Update

Learn about the relief provisions included in the 2021 Consolidated Appropriations Act and the American Rescue Plan Act. Review potential income and estate tax changes on the horizon and discuss various planning ideas and opportunities.

Damien Martin, CPA

Partner, BKD CPAs & Advisors

10:00 AM - 10:50 AM

Attestation Engagements

Receive an overview on the various types of attestation engagements. Evaluate the impact of SSAE 19, SSAE 21, and SSAE 22 on the attestation standards and identify the adoption effective dates for each.

Jennifer Allen, CPA 

Partner, Crowe LLP

10:00 AM - 10:50 AM

How Great Leaders Find Certainty in Uncertainty

The recent pandemic has led to uncertainty in all areas of life. Discover tactics to navigate the future and overcome the biggest and most common barriers to successfully move forward. Uncover how to shift the mindset of others to help them find certainty in uncertainty.

Bill Wooditch

CEO, The Wooditch Group



Concurrent Educational Sessions

8.24.21

10:00 AM - 10:50 AM

How to Hire, Train, and Retain Top Talent

Discover strategies to hire smart and attract top talent. Discuss ways to orient and mentor new employees that are reflective of generational differences. Plus, develop employee retention plans that meet both individuals' needs and the company's expectations.

Michael A. Gregory, MS, MBA 
Founder, Michael Gregory Consulting, LLC

10:00 AM - 10:50 AM

Establishing and Maintaining Fiduciary Relationships

Learn about the different types of fiduciary relationships and analyze criteria for selecting trustees. Review ethical parameters and risks, as well as discuss potential remedies for breaches of fiduciary duty.

Michael N. Ripani, CPA, JD, CFE
Senior Counsel, Handler Thayer, LLP

11:00 AM - 11:50 AM

Business Tax Update

The impact and response to the COVID-19 pandemic continues to dominate tax compliance and planning conversations for businesses. Unpack the relief provisions of recent legislative packages and discuss possible tax changes that could be on the way.

Damien Martin, CPA
Partner, BKD CPAs & Advisors

11:00 AM - 11:50 AM

Auditing Remotely


Learn how to strategically plan and perform remote audits to transform your practice and avoid reverting to old habits. Plus, discover best practices for engaging staff when working remotely.

Elizabeth Sloan, CPA, MAS
Managing Director, Grant Thornton LLP

11:00 AM - 11:50 AM

Ethical Leadership: Principles and Practices


Learn to bring out the best in others by focusing on positive intent and impact. Explore the guiding principles that allow leaders to lead with a moral compass. Discuss seven ethical responsibilities and hear how to apply three keys to building trust.

Michael A. Gregory, MS, MBA 
Founder, Michael Gregory Consulting, LLC

11:00 AM - 11:50 AM

Budgeting and Forecasting in Uncertain Times

Discuss implementation-ready and theoretical approaches for improving the budgeting and forecasting process. Identify key business drivers for more agile decision-making while learning how to implement simple, yet powerful, modeling and scenario techniques to remove guesswork, increase confidence, and mitigate risk.

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

 = Remote Speaker

Concurrent Educational Sessions

8.24.21



11:00 AM - 11:50 AM

Sell Your Brain, Not Your Time: Subscription Pricing for Professionals

Explore nine types of subscription business models and identify strategies to make the transition at your organization. Learn how to develop new metrics and accounting information to represent the economics of a subscription business.

Ed Kless
Senior Director, Sage

12:50 PM - 1:40 PM

Best Practices for Defending an IRS Exam: Practice Tips

From the notice of examination to the closing letter, walk through every step of an IRS examination process and discuss the steps to take to best position your clients for success. Learn how to properly respond to information document requests, whether to produce your client for an interview, how to watch for potential criminal exposure, and what to do if you find it.

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

12:50 PM - 1:40 PM

FASB Update

Get up-to-speed on current projects and discuss the potential impact of recently issued accounting standards. Understand how specific developments may affect financial reporting requirements.

Ryan Brady, CPA
Partner, Grant Thornton LLP

12:50 PM - 1:40 PM

How to Be a Networking Ninja in a Virtual Environment


Make the most of your virtual rectangle and learn to shine through your computer with the right body language. Receive tips for improving your virtual presence and creating connections that can also bring big dividends in office meetings too.

Alison Henderson,
MFA, GL-CMA, MPACC
CEO, Moving Image
Consulting LLC

12:50 PM - 1:40 PM

Balanced Scorecard and KPIs

Learn about strategic mapping and why a driver-based, balanced scorecard approach is among the most effective approaches to organizational planning. Discover how to establish KPIs and incorporate them into planning for encouraging buy-in, tracking progress, and inspiring greater accountability.

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

12:50 PM - 1:40 PM

How to Manage and Run a Virtual Tax Season

Receive a blueprint to build an efficient and profitable virtual firm in time for the next tax season, including key technology and workflow considerations. Learn how to transition your current clients to a virtual way of working and discover tips to manage and motivate your own remote team.

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

 = Remote Speaker



Concurrent Educational Sessions

8.24.21

1:50 PM - 2:40 PM

Tangible Property Repair Regulations

Discuss the compliance requirements of a 1031 Exchange. Identify potential tax planning strategies on both a retroactive and prospective basis and gain an in-depth understanding of Unit of Property rules.

Lester Cook, CCSP 
Principal, KBKG

1:50 PM - 2:40 PM

Single Audit Update

Address the key changes and challenges when preparing a Single Audit. Review the new compliance supplement, understand how to prepare the schedule of expenditures of federal awards, and walk away with planning tips to avoid surprises.

Jennifer Culotta, CPA 
Partner, Plante Moran

Melissa Sutherland, CPA 
Assurance Manager, Plante Moran

1:50 PM - 2:40 PM

How the ABCD of the Digital Age Impacts Corporate Ethics

Automation (including artificial intelligence), blockchain, cybersecurity, and data governance (ABCD) are driving digital transformation. What are the ethical implications to us and the organizations we serve? Learn how to ensure that ethical considerations are incorporated into your organization's governance and internal controls over digitized processes and data analytics.

Donny C. Shimamoto
CPA.CITP, CGMA
Founder and Managing Director,
IntrapriseTechKnowlogies LLC

1:50 PM - 2:40 PM

Data Readiness Assessment Model: Is Your Organization Ready?


Uncover how to incorporate a data readiness assessment as the foundation for an effective data strategy. Leave with a better understanding of how to implement and operate a data readiness framework model to better manage data within your organization.

Rebecca S. Busch, RN, MBA,
CCM, CFE, CPC, CHPA-IV,
CRMA, CICA, FIALCP, FHFMA
President and CEO, Medical
Business Associates

1:50 PM - 2:40 PM

Navigating the Next 12 Months: Creating a Foundation for Enduring Success

Discover new AI-driven tools readily available today to help you improve the efficiency and effectiveness of your practice. Gain insights into how you can drive value by modernizing client workflows, automating rudimentary tasks, and delivering data-driven insights.

Jasen Stine 
Tax and Accountant Education
Leader, Intuit

3:30 PM - 4:20 PM

Illinois and Beyond! Multi-State Tax Update

Discover best practices for navigating state sales tax issues including nexus, tax immunity protection, and marketplace facilitator laws. Understand when a state has the power to tax a company without violating federal law and how to source income related to COVID and work-from-home scenarios. Plus, review guidelines for taxing owners of pass-through entities.

Carol Portman, JD
President, Taxpayer's Federation
of Illinois

Eric Fader, CPA, JD
Managing Director, BDO USA, LLP

Concurrent Educational Sessions

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3:30 PM - 4:20 PM

Fair Value Accounting: Impact on Financial Statements

Explore how fair value concepts have transformed GAAP requirements. Learn the key assets and liabilities that are recorded at fair value and recognize common pitfalls to avoid when preparing GAAP compliant financial statements.

Kara Fahrenbach, CPA
Senior Manager, Plante Moran

David J. Kristick, MSA
Partner, Industry Technical Leader,
Plante Moran

3:30 PM - 4:20 PM

Ten Tips for Small Business Employment Compliance


Review key legal compliance issues impacting small employers and receive practical tips for reducing risks, claims, audits, and costs. Learn about worker misclassification, discrimination and harassment, social media restrictions, work-from-home rules, and more.

Lori Goldstein, JD
Employment Attorney, Law Office
of Lori A. Goldstein LLC

3:30 PM - 4:20 PM

AI and Machine Learning: The Impact on Accounting and Finance

Explore how AI and machine learning are impacting people, process, and performance strategies, and assess your team and organization's readiness to utilize these new technologies.

Chris Ortega, MBA 
Director of Finance, Emarsys
North America, Inc.

3:30 PM - 4:20 PM

Do You Have Executive Presence?

Discuss the skills necessary to build a strong executive presence. Define your specific attributes and learn how to use them to increase your effectiveness as a leader.

Brett Taylor
Chief Member Engagement
Officer, The Executive's Club
of Chicago

4:30 PM - 5:45 PM

Transcending Technology: Ensuring Relevance in an Automated World

As more accounting functions become automated, how do CPAs ensure they are not replaced by robots and artificial intelligence? Discuss the evolution of accounting information ecosystems due to emerging technology trends like automation, blockchain, cybersecurity, and data governance and learn how to transcend these technologies and ensure your relevance in the digital age.

Donny C. Shimamoto, CPA.CITP, CGMA
Founder and Managing Director, IntrapriseTechKnowlogies LLC

KEYNOTE

 = Remote Speaker



Concurrent Educational Sessions

8.25.21

Wednesday

8.25.21

8:00 AM - 9:15 AM

Eyeing Our Economy

As the economy overcomes COVID-19, and ongoing stimulus efforts keep the most negative outcomes in check, the outlook for growth is good in 2021 and 2022. But at what costs? Evaluate the impact of fiscal stimulus, including rising inflation and a weaker dollar, and how pent-up consumer demand and continued central bank accommodations could potentially accelerate an economic recovery before tightened fiscal policies come into play.

Derek Sasveld, CFA

Senior Investment Strategist, BMO Global Asset Management

KEYNOTE

10:00 AM - 10:50 AM

Nuts and Bolts of Cryptocurrency Taxation

Understand the tax implications of investing in cryptocurrency, running a mining operation, and using it as a payment method. Learn about challenges in dealing with cryptocurrency clients and discover tax planning opportunities.

Shehan Chandrasekera, CPA

Head of Tax Strategy, CoinTracker

Concurrent Educational Sessions


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10:00 AM - 10:50 AM

2021 Auditing Update

The Auditing Standards Board released a new suite of standards resulting in the most comprehensive changes in over a decade. Hear how SAS 134 to SAS 140 are interrelated and affect private company and not-for-profit audits. Break down changes impacting employee benefit plan audits and other annual report information. Plus, understand the components of the new auditor report.

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

10:00 AM - 10:50 AM

Not-for-Profit Corporate Governance

Explore new not-for-profit corporate governance models and discuss how to keep them compliant with existing laws on fiduciary responsibilities and board oversight. Hear about common challenges organizations have faced and receive tips to address them.

Paula Goedert, JD
Partner, Barnes & Thornburg LLP

10:00 AM - 10:50 AM

One Simple Question to Spark Innovation and Growth

Learn to shift the threat of emerging technologies such as AI into opportunities by becoming more entrepreneurial and innovative than ever before. Understand how one simple question can help spark innovation and growth resulting in enhanced value to both your organization and your clients or customers.

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

10:00 AM - 10:50 AM

Technology Solutions for the Modern Workplace

Learn how organizations of all sizes can transform into a productive, organized, and collaborative remote workforce that operates in a purely cloud or hybrid environment. Receive a demo of the Microsoft 365 Modern Workplace stack including OneDrive, SharePoint, Microsoft Teams, Power BI, and Cloud Security.

Matt Diliberto
Manager, Modern Workplace,
BDO USA, LLP

11:00 AM - 11:50 AM

Transfer Pricing After Tax Reform


Hear practical insights on U.S. and international transfer pricing rules. Learn how to reduce transfer pricing risks through documentation and benchmarking studies. Plus, discover new tax and cash savings opportunities in a COVID-19 environment.

Alex Martin, MPP
Principal, KBKG

11:00 AM - 11:50 AM

Get Ready for the Lease Standard

The new lease standard for private companies and not-for-profits goes live in 2022. Discuss common practice issues companies are facing. Hear about lessons learned from public company adoption and receive best practice tips for implementation.

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



Concurrent Educational Sessions

8.25.21

11:00 AM - 11:50 AM

Mission Critical Leadership: How Smart Managers Lead Well in All Directions

While it is important to be a good boss, leadership is much more than that. Discover the importance of self-leadership as the starting point for leadership success and gain practical tips to lead well in all directions within your organization.

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

11:00 AM - 11:50 AM

Advanced Strategies for Health Savings Accounts

Review the basics of Health Savings Accounts and understand how they are becoming a source of wealth accumulation rather than a spending account. Learn about advanced tax planning strategies you may be missing.

Kelley C. Long, CPA/PFS, CFP
Owner, Kelley C. Long
Consulting LLC

11:00 AM - 11:50 AM

RPA: Implementation Best Practices

Review the basics of Robotic Process Automation (RPA) and discover how to introduce this technology at your organization. See a bot in action and hear lessons learned for converting a single automation into an integrated automation program that achieves sustainable ROI.

Chris Denver, CPA, MBA
National Practice Director,
International Financial Group

Jim Hannan, CPA
National Practice Director,
International Financial Group

12:50 PM - 1:40 PM

Flow-Through Hot Topics

Discuss recent legislative updates related to flow-through entities, including interest expense limitation under §163(j), carried interest under §1061, and much more.

Matthew Vertin, CPA, MST
Director, Baker Tilly Virchow
Krause, LLP

12:50 PM - 1:40 PM

Digital Asset Accounting

Review current reporting practices for digital assets and hear best practices for signing devices and evaluating internal controls. Take a brief look at the top sources and the top three digital asset events that can impact financial statements.

Joshua Schmidt 
Senior Blockchain Analyst,
Marcum LLP

12:50 PM - 1:40 PM

Managing the Risks and Ethical Responsibilities of Benefit Plan Fraud in a COVID-19 Environment

Hear about various benefit plan fraud threats and discuss potential responses and ethical considerations for each scenario. Walk away with an action plan to anticipate and reduce fraud at your organization.

Gene Cahill, CPA, CFE, CFF
Partner, Grant Thornton LLP

Wendy Garrett
Independence and Ethical
Standards – Managing Director,
Grant Thornton LLP

Concurrent Educational Sessions

8.25.21



12:50 PM - 1:40 PM

Gender Parity in the Time of COVID

Attrition among women is at an all-time high. Discuss the impact that a small decline in female advancement may have on your organization's future success. Hear how to be better allies and advocates and receive strategies for retaining and promoting women in a post-pandemic world.

JoAnna Simek, CPA, MST
Partner, BKD CPAs & Advisors

12:50 PM - 1:40 PM

Be More Valuable to Your Clients

What does it really mean to be a strategic advisor? Join Todd Shapiro and a panel of practitioners as they discuss how to address the challenges of getting your staff (and sometimes your fellow partners) to proactively offer strategic insight to help your clients increase their profitability as a component of providing your normal accounting, audit, or tax services.

Todd Shapiro
President and CEO,
Illinois CPA Society

Mary K. Fuller, CPA
Managing Partner, Shepard
Schwartz & Harris LLP

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

**Jeffery L. Mowery, CPA,
JD, LLM, CFP**
Managing Partner, Mowery
& Schoenfeld

1:50 PM - 2:40 PM

Research and Development Tax Credit Fundamentals

Learn how to identify qualifying projects and review various methods to calculate the benefits. Plus, discuss key project implementation steps and tips to avoid common pitfalls along the way.

Michael Maroney, EA
Director, KBKG

1:50 PM - 2:40 PM

Audit Documentation: Quality and the Questioning Mind

The true cost of quality can take time to be seen clearly. Look at the recent auditing guidance surrounding audit quality and consider examples where a lack of quality ended up costing firms.

**Sean M. Kruskol, CPA,
CGMA, MAcc, CFE**
Principal, Cornerstone Research

1:50 PM - 2:40 PM

Bye-Bye Bias: The Ethics of Creating a Bias-Free Workplace

Learn how to create a workplace culture that is sensitive, responsive, and welcoming. Identify implicit bias and micro-aggressions and discover resources to become an expert-level ally who champions professional equity.

Jamar Cobb-Dennard, JD
Business Broker, Indiana
Business Advisors

1:50 PM - 2:40 PM

Helping You Be a Better Manager: The Importance of Documentation

The three most important things in the employment relations arena are "documentation, documentation, and documentation." Discover the tools and confidence to effectively document employee interactions and issues to prevent problems and, if necessary, enhance your litigation position.

Jon Vegosen, JD
Founding Member, Funkhouser
Vegosen Liebman & Dunn Ltd.

 = Remote Speaker




Concurrent Educational Sessions

8.25.21

1:50 PM - 2:40 PM

Next-Gen Transitioning: Building a Sustainable and Transferable Firm

Understand how to develop the next generation of CPAs to take on the roles and responsibilities as future firm owners. Explore ways to get started and leave with a game plan for creating a sustainable and transferable firm.

Dan McMahon, CPA 
Managing Partner, Integrated Growth Advisors

3:30 PM - 4:20 PM

A Year in Tax for Exempt Organizations

Take a deep dive into the updated guidance and final regulations of the Tax Cuts and Jobs Act and other COVID-19-related legislation. Learn about IRS compliance programs and initiatives and gain insight into the newly updated Form 990-T.

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

Zachary Fortsch, CPA 
Tax Partner, RSM US LLP

3:30 PM - 4:20 PM

Evaluating Going Concern Issues

Dig into AICPA, FASB, and PCAOB guidance on going concern issues. Discuss the role government will play with consideration to the Paycheck Protection Program, the Employee Retention Credit, and Economic Injury Disaster Loans, among others.

Megan Angle, CPA
Partner, Porte Brown LLC

3:30 PM - 4:20 PM

Preventing and Investigating Sexual and Other Harassment in a #MeToo World


Understand what does, and does not, constitute sexual and other harassment. Discover how to prevent and spot harassment and why it is so important to do so quickly. Plus, learn strategies to investigate and address harassment claims that protect both the employees and the employer.

Jon Vegosen, JD
Founding Member, Funkhouser Vegosen Liebman & Dunn Ltd.

3:30 PM - 4:20 PM

Driving Business Process Improvements

Explore the importance of aligning business process improvement initiatives with the overall strategic objectives of the company. Discuss 18 key drivers of value and performance and learn strategies for implementing effective change management tactics.

Dan McMahon, CPA 
Managing Partner, Integrated Growth Advisors

3:30 PM - 4:20 PM

Harnessing Technology and Remaining Relevant in the Digital Age

2020 exposed inefficiencies and limitations for many business processes. Explore how executives at forward-thinking organizations quickly transitioned from manual operations to digital systems. Hear how they overcame common objections like "we're too small" or "we can't afford it." Plus, discover the tools needed for your own digital transformation.

Ranga Bodla
Vice President - Industry Marketing, Oracle NetSuite



4:30 PM - 5:45 PM

KEYNOTE

When Was the Last Time You Told a Really Good Story?

CPAs hold the keys to understanding the underlying economics of an entity and helping guide it towards future productivity and sustainability. But are you conveying that information in a way that is simple enough for everyone to grasp? Learn to use storytelling to unlock value and keep your organization agile enough to navigate even the most turbulent of times.

Nykia Wright, MBA
CEO, Chicago Sun-Times

ICPAS **SUMMIT**[™]21
The Premier Event for Accounting and Finance Professionals[®]

RELEVANCE

STRATEGIC ⊕ TRANSFORMATION ⊖ SUCCESS

REGISTER **TODAY!**

By registering to attend this event in person, I agree to abide by each of the COVID-19 safety protocols that are in place for the event. I understand that failure to comply may result in expulsion from the event with no refund. I acknowledge that my in-person attendance is voluntary, and I waive and release ICPAS from any liability arising from the contraction of communicable diseases.

REGISTRATION OPTIONS

✓ Code:	Date:	Title:	ICPAS M/NM:	Total:
<input type="checkbox"/> PC1	8/23	Pre-SUMMIT Virtual Workshops - select session below (Registration for the SUMMIT Session Pass is required)	\$210	\$ _____
<input type="checkbox"/> RB1	8/24-25	2-Day Session Pass	\$355/\$380	\$ _____
PLEASE SELECT ONE. I will be attending SUMMIT21: <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:
MONDAY, AUGUST 23, 2021				
<input type="checkbox"/>	005	1:00 ^{PM} - 4:30 ^{PM}	Basic Trusts: Taxation of Trusts and Preparing Form 1041 (Virtual Only)	4 Taxes / 4 CPE/3.25 CLE/4 CFP/4 EA
<input type="checkbox"/>	006	1:00 ^{PM} - 4:30 ^{PM}	Practice Challenges in a COVID-19 World (Virtual Only)	4 Taxes / 4 CPE/3.25 CLE/4 CFP/4 EA
TUESDAY, AUGUST 24, 2021				
<input type="checkbox"/>	100	8:00^{AM} - 9:15^{AM}	Keynote: The State of the CPA Profession – Today and Tomorrow	1.5 Accounting / 1.5 CPE
<input type="checkbox"/>	101	10:00 ^{AM} - 10:50 ^{AM}	Individual Tax Update	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	102	10:00 ^{AM} - 10:50 ^{AM}	Attestation Engagements	1 CPE
<input type="checkbox"/>	103	10:00 ^{AM} - 10:50 ^{AM}	How Great Leaders Find Certainty in Uncertainty	1 CPE
<input type="checkbox"/>	104	10:00 ^{AM} - 10:50 ^{AM}	How to Hire, Train, and Retain Top Talent	1 CPE
<input type="checkbox"/>	105	10:00 ^{AM} - 10:50 ^{AM}	Establishing and Maintaining Fiduciary Relationships	1 CPE
<input type="checkbox"/>	106	11:00 ^{AM} - 11:50 ^{AM}	Business Tax Update	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	107	11:00 ^{AM} - 11:50 ^{AM}	Auditing Remotely	1 CPE
<input type="checkbox"/>	108	11:00 ^{AM} - 11:50 ^{AM}	Ethical Leadership: Principles and Practices	1 CPE/1 Ethics/.75 CLE
<input type="checkbox"/>	109	11:00 ^{AM} - 11:50 ^{AM}	Budgeting and Forecasting in Uncertain Times	1 CPE/1 CFP
<input type="checkbox"/>	110	11:00 ^{AM} - 11:50 ^{AM}	Sell Your Brain, Not Your Time: Subscription Pricing for Professionals	1 CPE
<input type="checkbox"/>	111	12:50 ^{PM} - 1:40 ^{PM}	Best Practices for Defending an IRS Exam: Practice Tips	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	112	12:50 ^{PM} - 1:40 ^{PM}	FASB Update	1 CPE
<input type="checkbox"/>	113	12:50 ^{PM} - 1:40 ^{PM}	How to Be a Networking Ninja in a Virtual Environment	1 CPE
<input type="checkbox"/>	114	12:50 ^{PM} - 1:40 ^{PM}	Balanced Scorecard and KPIs	1 CPE

✓	Code:	Time:	Title:	Field of Study:	Credits:
TUESDAY, AUGUST 24, 2021 CONTINUED					
<input type="checkbox"/>	115	12:50 ^{PM} - 1:40 ^{PM}	How to Manage and Run a Virtual Tax Season	1 Information Technology	1 CPE
<input type="checkbox"/>	116	1:50 ^{PM} - 2:40 ^{PM}	Tangible Property Repair Regulations	1 Taxes	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	117	1:50 ^{PM} - 2:40 ^{PM}	Single Audit Update	1 Auditing (Government/Yellow Book)	1 CPE/1 Yellow Book
<input type="checkbox"/>	118	1:50 ^{PM} - 2:40 ^{PM}	How the ABCD of the Digital Age Impacts Corporate Ethics	1 Behavioral Ethics	1 CPE/1 Ethics/.75 CLE
<input type="checkbox"/>	119	1:50 ^{PM} - 2:40 ^{PM}	Data Readiness Assessment Model: Is Your Organization Ready?	1 Information Technology	1 CPE
<input type="checkbox"/>	120	1:50 ^{PM} - 2:40 ^{PM}	Navigating the Next 12 Months: Creating a Foundation for Enduring Success	1 Management Services	1 CPE
<input type="checkbox"/>	121	3:30 ^{PM} - 4:20 ^{PM}	Illinois and Beyond! Multi-State Tax Update	1 Taxes	1 CPE/.75 CLE/1 CFP
<input type="checkbox"/>	122	3:30 ^{PM} - 4:20 ^{PM}	Fair Value Accounting: Impact on Financial Statements	1 Accounting	1 CPE
<input type="checkbox"/>	123	3:30 ^{PM} - 4:20 ^{PM}	Do You Have Executive Presence?	1 Personal Development	1 CPE
<input type="checkbox"/>	124	3:30 ^{PM} - 4:20 ^{PM}	Ten Tips for Small Business Employment Compliance	1 Personnel/Human Resources	1 CPE
<input type="checkbox"/>	125	3:30 ^{PM} - 4:20 ^{PM}	AI and Machine Learning: The Impact on Accounting and Finance	1 Information Technology	1 CPE
<input type="checkbox"/>	126	4:30^{PM} - 5:45^{PM}	Keynote: Transcending Technology: Ensuring Relevance in an Automated World	1.5 Information Technology	1.5 CPE

WEDNESDAY, AUGUST 25, 2021					
<input type="checkbox"/>	200	8:00^{AM} - 9:15^{AM}	Keynote: Eyeing Our Economy	1.5 Economics	1.5 CPE/1.5 CFP
<input type="checkbox"/>	201	10:00 ^{AM} - 10:50 ^{AM}	Nuts and Bolts of Cryptocurrency Taxation	1 Taxes	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	202	10:00 ^{AM} - 10:50 ^{AM}	2021 Auditing Update	1 Auditing	1 CPE
<input type="checkbox"/>	203	10:00 ^{AM} - 10:50 ^{AM}	Not-for-Profit Corporate Governance	1 Business Management & Organization	1 CPE/.75 CLE
<input type="checkbox"/>	204	10:00 ^{AM} - 10:50 ^{AM}	One Simple Question to Spark Innovation and Growth	1 Management Services	1 CPE
<input type="checkbox"/>	205	10:00 ^{AM} - 10:50 ^{AM}	Technology Solutions for the Modern Workplace	1 Information Technology	1 CPE
<input type="checkbox"/>	206	11:00 ^{AM} - 11:50 ^{AM}	Transfer Pricing After Tax Reform	1 Taxes	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	207	11:00 ^{AM} - 11:50 ^{AM}	Get Ready for the Lease Standard	1 Accounting	1 CPE
<input type="checkbox"/>	208	11:00 ^{AM} - 11:50 ^{AM}	Mission Critical Leadership: How Smart Managers Lead Well in All Directions	1 Personal Development	1 CPE
<input type="checkbox"/>	209	11:00 ^{AM} - 11:50 ^{AM}	Advanced Strategies for Health Savings Accounts	1 Specialized Knowledge	1 CPE
<input type="checkbox"/>	210	11:00 ^{AM} - 11:50 ^{AM}	RPA: Implementation Best Practices	1 Information Technology	1 CPE
<input type="checkbox"/>	211	12:50 ^{PM} - 1:40 ^{PM}	Flow-Through Hot Topics	1 Taxes	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	212	12:50 ^{PM} - 1:40 ^{PM}	Digital Asset Accounting	.5 Accounting, .5 Information Technology	1 CPE
<input type="checkbox"/>	213	12:50 ^{PM} - 1:40 ^{PM}	Managing the Risks and Ethical Responsibilities of Benefit Plan Fraud in a COVID-19 Environment	1 Behavioral Ethics	1 CPE/1 Ethics/.75 CLE
<input type="checkbox"/>	214	12:50 ^{PM} - 1:40 ^{PM}	Gender Parity in the Time of COVID	1 Personal Development	1 CPE
<input type="checkbox"/>	215	12:50 ^{PM} - 1:40 ^{PM}	Be More Valuable to Your Clients	1 Management Services	1 CPE
<input type="checkbox"/>	216	1:50 ^{PM} - 2:40 ^{PM}	Research and Development Tax Credit Fundamentals	1 Taxes	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	217	1:50 ^{PM} - 2:40 ^{PM}	Audit Documentation: Quality and the Questioning Mind	1 Auditing	1 CPE
<input type="checkbox"/>	218	1:50 ^{PM} - 2:40 ^{PM}	Bye-Bye Bias: The Ethics of Creating a Bias-Free Workplace	1 Behavioral Ethics	1 CPE/1 Ethics/.75 CLE
<input type="checkbox"/>	219	1:50 ^{PM} - 2:40 ^{PM}	Helping You Be A Better Manager: The Importance of Documentation	1 Business Management & Organization	1 CPE
<input type="checkbox"/>	220	1:50 ^{PM} - 2:40 ^{PM}	Next-Gen Transitioning: Building a Sustainable and Transferable Firm	1 Management Services	1 CPE
<input type="checkbox"/>	221	3:30 ^{PM} - 4:20 ^{PM}	A Year in Tax for Exempt Organizations	1 Taxes	1 CPE/.75 CLE/1 CFP/1 EA
<input type="checkbox"/>	222	3:30 ^{PM} - 4:20 ^{PM}	Evaluating Going Concern Issues	.5 Accounting, .5 Auditing	1 CPE
<input type="checkbox"/>	223	3:30 ^{PM} - 4:20 ^{PM}	Preventing and Investigating Sexual and Other Harassment in a #MeToo World	1 Personal Development, 1 Sexual Harassment	1 CPE/1 SHPT/.75 CLE
<input type="checkbox"/>	224	3:30 ^{PM} - 4:20 ^{PM}	Driving Business Process Improvements	1 Management Services	1 CPE
<input type="checkbox"/>	225	3:30 ^{PM} - 4:20 ^{PM}	Harnessing Technology and Remaining Relevant in the Digital Age	1 Information Technology	1 CPE
<input type="checkbox"/>	226	4:30^{PM} - 5:45^{PM}	Keynote: When Was the Last Time You Told a Really Good Story?	1.5 Personal Development	1.5 CPE

REGISTRATION INFORMATION (PRE-REGISTER TODAY!)

Pre-Registration Process:

- Upon registering for ICPAS SUMMIT21, attendees will receive an email confirmation.
- Starting August 16, 2021, all registered attendees will receive access to the SUMMIT21 Portal. From here, attendees will be able to begin to talk with exhibitors, and become familiar with the platform.
- All attendees will receive an email the week prior to ICPAS SUMMIT21 that will include helpful hints, tips and event details.
- In-person attendees will pick up their badge on-site the day of the event at the registration booth.

WEBSITE: www.icpas.org/summit

FAX: Both pages with credit card information to 312.993.9432

MAIL: Both pages with check or credit card information to
Illinois CPA Society, Attention Member Services
550 W. Jackson Blvd., Suite 900, Chicago, IL 60661-5742

If you have questions, or changes to your schedule, please call Member Services at 800.993.0407, option 4. No refunds will be given. Substitutions are permitted.



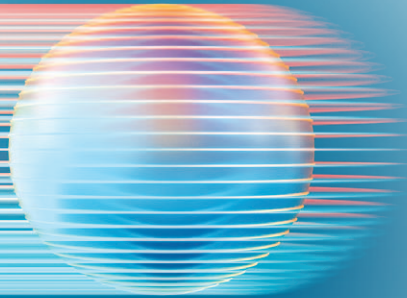
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August 24-25, 2021

Donald E. Stephens Convention Center
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SUMMIT21 is a great way to get your CPE hours before the September 30, 2021 Reporting Year deadline!

Reminder, Illinois CPAs need 120 hours of CPE to renew their license.

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