

CPA Educators Conference 2024

Better Together

Schedule of Events:

Wednesday, February 28, 2024 – 2:00 - 4:30 PM CT

- 2:00 – 2:50 PM - **Future-Proof Your Leadership: Building Resilience, Flexibility, and Agility**

Persistent and pervasive changes in the workplace compel leaders to continually develop new skills to be relevant and effective. The 2023 World Economic Forum Future of Jobs Report identified resilience, flexibility, and agility among the top skills leaders will need in the workplace of the future. Understand why these traits are more critical than ever, discover self-leadership practices to develop them in yourself, and explore opportunities to cultivate them throughout your organization. Don't just survive change - thrive in it!

Key Learning Objectives:

- Define resilience, flexibility, and agility, recognizing the importance of these traits to sustainable leadership.
- Discover self-leadership practices to develop and employ these skills in the midst of constant change.
- Explore opportunities to cultivate resilience, flexibility, and agility in the team you lead.

Jon Lokhorst, CSP, CPA, PCC – *Executive Leadership Coach, Lokhorst Consulting LLC, Princeton, MN*

- 3:00 – 4:30 PM - **State of the Accounting Profession & Hot CPE Topics to Keep on Your Radar**

Keeping up with the profession is a daunting task, but important to do if you want to stay relevant to your members. Join our panelists as they discuss what is going on in the profession in 2024 and hot topics to consider when scheduling your programs.

Melisa F. Galasso, CPA, CGMA – *Owner, Galasso Learning Solutions LLC, Charlotte, NC*

Andrew Grow CAE – *Director of Outreach and Development, Missouri Society of Certified Public Accountants, St. Louis, MO*

William F. (Bill) Taylor, CPA – *Owner/President, Benefit Solutions, Ltd., Taylor, MS*

Moderator: **Jon Lokhorst, CSP, CPA, PCC** – *Executive Leadership Coach, Lokhorst Consulting LLC, Princeton, MN*

- 4:30 - 6:00 PM - Cocktail Reception - Hosted by Surgent

Thursday, February 29, 2024 - 8:45 AM – 4:20 PM CT

- 7:45 – 8:45 AM – Breakfast, Sponsored by AICPA
- 8:45 – 9:35 AM – **Doing More with Less and Taking Care of Yourself**

Explore the art of achieving more with less in both your personal and professional life in this engaging session. Discover strategies to optimize your productivity and efficiency,

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all while prioritizing self-care to maintain a balanced and sustainable lifestyle. Join us for an enlightening discussion that will equip you with practical tools for achieving your goals while ensuring your well-being remains a top priority.

Dr. Brooke Stuart – *Holistic Doctor and Founder of Let Go & Grow® International, Orlando, FL*

○ 9:35 – 10:25 AM - **Bolstering the CPA Pipeline through Learning and Development**

Explore key issues in the CPA profession pipeline. Discuss what is being done to recruit the next generation of professionals and plug the leaks in the pipeline. Learn how Learning and Professional Development Departments can play a role in addressing these challenges.

Ron Gitz, CPA, CGMA – *Executive Director/CEO - Society of Louisiana Certified Public Accountants, Metairie, LA*

○ 10:25 – 10:45 AM – Break and meet with Sponsors.

○ 10:45 AM – 12:15 PM – **Collaborative Excellence in Learning: Insights from our Professional Development Departments**

Unlock the secrets to collaborative success in professional development as our panel of peers shares their experiences and strategies during this enlightening discussion. Learn how these experts effectively collaborate to create and strengthen our collective success. Following the panel, we'll break into roundtable discussions to discuss other strategies to stay relevant with our members and drive interest with our programming.

Linda Newsom-McCurdy, CAE – *Senior Director, Learning, Virginia Society of Certified Public Accountants, Glen Allen, VA*

Christina Pristasch – *Manager – Systems and Learning Operations, Indiana CPA Society, Indianapolis, IN*

Claire Hoey – *Senior Manager, Learning and Development, Massachusetts Society of CPAs, Boston, MA*

Moderator and Roundtable Discussion Leader: **Hayden Williams, CPA** – *Director of Business Development, ACPEN*

○ 12:15 – 1:10 PM - Lunch, Sponsored by ACPEN

○ 1:10 – 2:30 PM – **K2's Analyzing AI and Other Technologies Coming Down the Pipeline**

Technology permeates seemingly almost aspect of our professional and personal lives. Yet, sometimes we are so focused on the here and now that we fail to consider what lies ahead. If we fail to consider technologies coming down the pipeline, we may also fail to fully capitalize on what they offer.

In this session you will learn about emerging technologies and the impact they will likely have in the future state. You will learn about AI, automation, connectivity issues and options, sustainable technology, the Internet of Things and how you can take advantage of these tools for improved efficiency and effectiveness.

Learning Objectives:

- Identify examples the positive impacts and risks associated with AI
- Cite some of the drivers associated with implementing automation

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- Provide some examples of how uber-connectivity has changed the business landscape forever
- List examples of ways to make technology more sustainable
- Identify use cases for various Internet of Things devices

Tommy Stephens, CPA, CITP, CGMA – *Managing Partner, K2 Enterprises*

- 2:30 – 2:50 PM – Break and meet with Sponsors.
- 2:50 – 4:20 PM – Roundtables Discussions
- 4:30 - 6:00 PM - Cocktail Reception - Hosted by Western CPE

Friday, March 1, 2024 – 9:00 – 10:50 AM CT

- 7:45 – 9:00 AM - Breakfast, Sponsored by Zoho
- 9:00 – 9:50 AM – **Mastering Budgeting and Scheduling: Solutions and Best Practices**
Join us for a unique and informative discussion as our colleagues share their insights and experiences in budgeting and scheduling professional development programs. Gain valuable knowledge on how they effectively plan and allocate resources to enhance their learning initiatives.

Kate Donmoyer – *Director of Education, Washington Society of CPAs, Bellevue, WA*

Melissa Moon, MA, MEd – *Learning Manager, North Carolina Associations of Certified Public Accountants, Morrisville, NC*

Katie Shields – *Senior Director of Learning and Operations, Iowa Society of Certified Public Accountants, West Des Moines, IA*

Moderator: **Dan Kolasinski** – *Learning & Content Development Director, Michigan Association of CPAs, Troy, MI*

- 10:00 – 10:50 AM - **Curiosity and Lifelong Learning – Refreshing What We are Doing**
Lifelong learning is the key to wisdom. And wisdom is the key to success. In learning there are no full stops, only commas. WHAT IS YOUR BEST OPPORTUNITY FOR SUCCEEDING IN WORK, AND LIFE? CHANGE. IF THERE IS ONE CERTAINTY IN THE WORLD TODAY, IT'S THIS: CHANGE IS COMING YOUR WAY. The success you and your organization achieve depends on the knowledge and wisdom you possess, and the flexibility of your thinking. Lifelong learning is key. But today, with vast amounts of information pouring in every minute from hundreds of sources, thinking clearly and acquiring the knowledge has become a major challenge.

This session gives you clear and practical ideas to help you think flexibly, and learn anything better, easier, faster - and to help you master the skills of absorbing, retaining and using knowledge more effectively.

In this humorous, results-oriented presentation, you will learn:

- how to overcome limiting beliefs that block your ability to learn, and to succeed.

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- how to set up a "brain friendly" environment that supports focus, learning, and work flow.
- how to reduce stress from information overload.
- how to think creatively.
- the importance of understanding "The Red Queen Effect".
- why "thinking outside the box" isn't always the best thing to do.

You will also learn the #1 skill that is the most crucial to your thinking success... and much more!

Terry Small, B.Ed., M.A. - *"The Brain Guy", Vancouver, British Columbia, Canada*

- 10:50 AM – Adjournment