



2026 WICPA BUSINESS & INDUSTRY SPRING CONFERENCE

YOUR SOURCE FOR KEY UPDATES & INSIGHTS ON TIMELY ISSUES

HIGHLIGHTED TOPICS:



ECONOMIC & MARKET TRENDS: POST-PANDEMIC NORMALIZATION

Explore the post-pandemic landscape by reviewing inflationary forces, employment trends, interest rates and more



ADVANCED EXCEL: HIDDEN SECRETS & GEMS

Take ordinary spreadsheets to the next level with the powerful capabilities of Microsoft Excel



RESOLVING ETHICAL CONFLICTS

Learn how to turn a difficult situation around and get others to do the right thing

TUESDAY, MARCH 24 | BROOKFIELD CONFERENCE CENTER & WICPA CPE LIVESTREAM

2026 WICPA BUSINESS & INDUSTRY SPRING CONFERENCE

MATERIALS AT A GLANCE

The following materials are from the morning sessions of the 2026 WICPA Business & Industry Spring Conference held on Tuesday, March 24, including:

- Economic & Market Trends: Post-Pandemic Normalization
- Advanced Excel: Hidden Secrets & Gems
- Modern Finance, Smarter Tools: Practical AI for Decision-Makers

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Retirement Plans: The Hidden Tax Opportunity

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At High Point Capital Group, one of our primary goals is to help business owners maximize tax options and build the highest possible value for a future exit. We specialize in retirement plan design, tax integration, and exit planning for business owners and the CPAs who advise them. Many retirement plans were built to check the benefits box — not to maximize tax outcomes or enhance long-term value — and continue to influence deductions and income timing. A business owner's largest tax event — the sale of their company — is often treated as a one-year transaction rather than a coordinated, multi-year strategy, leaving opportunities on the table.

Are your clients' plans aligned with their tax strategy — or leaving opportunities on the table?


Start with a Retirement Plan Design, Tax Integration & Exit Readiness Review

Scan below to schedule!



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Source: www.cpapracticeadvisor.com



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*based on 2020 Client Retention Rates

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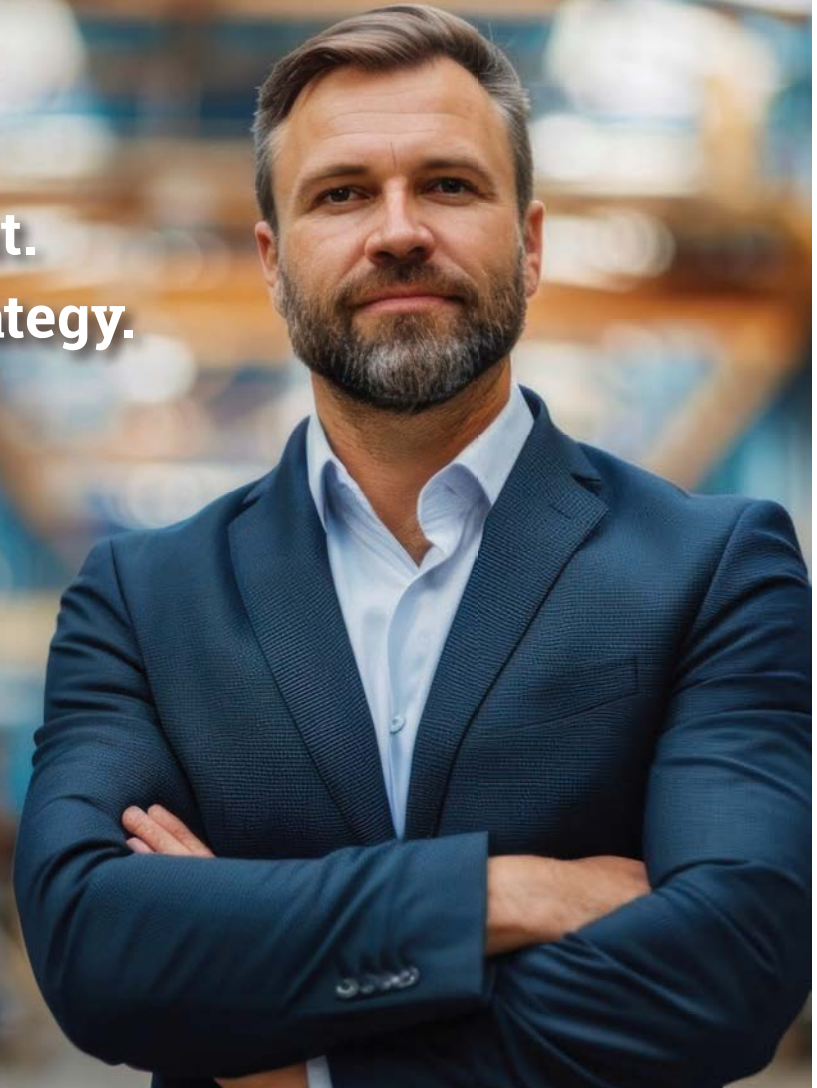
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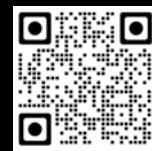


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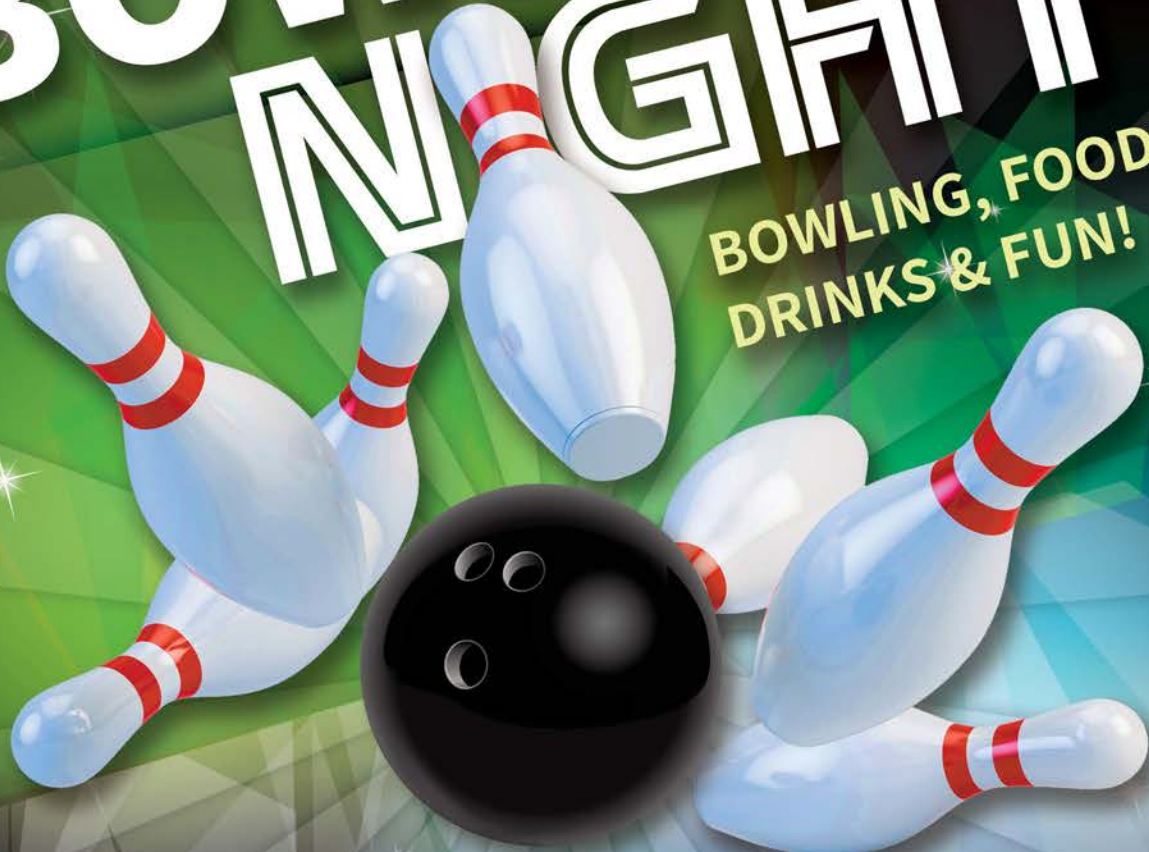
In life, they say it's the journey that counts — like the one from your first day open to breaking ground on a brand-new space. With our commercial banking solutions, we can help determine which loans or programs are best, so you can celebrate how far you've come and set your vision for what's next. From your firsts, lasts, and everything in between, at Waukesha State Bank we're with you for life.

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**Attendee must be present when awards and prizes are announced to receive an award or prize.*

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Reading Makes Cents

Sponsored by the WICPA Educational Foundation



Help Students Get Money-Smart

April is National Financial Literacy Month and a great opportunity for you to help students get smart about money by reading to an elementary school class (K - 4th grade) about the basics of money.

The WICPA Educational Foundation will provide everything you need.

For more information and to volunteer, visit wicpa.org/ReadingMakesCents.



**Educational
FOUNDATION**

*Member*²⁰²⁶ *Recognition Banquet* & ANNUAL BUSINESS MEETING



Friday, May 8, at 5 p.m.
Brookfield Conference Center

Join us for the WICPA's signature event of the year to:

- Recognize membership milestones.
- Present the 2026 Excellence Awards.
- Elect the 2026–2027 Board of Directors.
- Enjoy dinner, drinks and networking.

Complimentary for WICPA members.

Registration is required to attend.

For more information and details, visit wicpa.org/banquet.



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8:15 – 9:15 a.m.

Economic & Market Trends: Post-Pandemic Normalization

Jeffrey Allsop, CFA, *Chief Investment Officer, Capital
Investment Services of America, Inc.*



Economic and Market Trends: Post Pandemic Normalization

March 2026

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(800) 345-6462 | Capinv.com | Info@Capinv.com
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Charts were run as of mid-February 2026

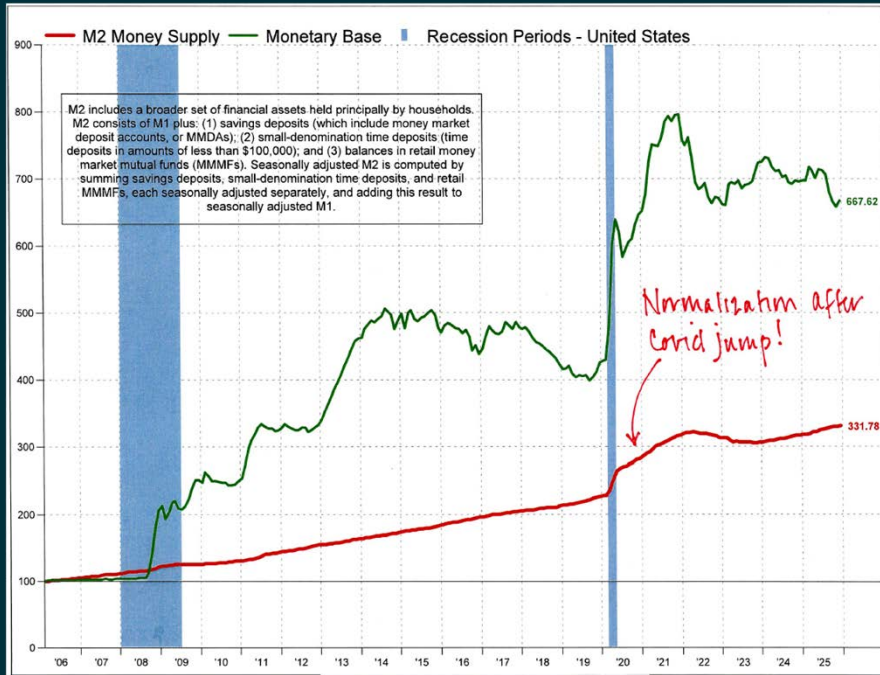
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Inflation & Tariffs

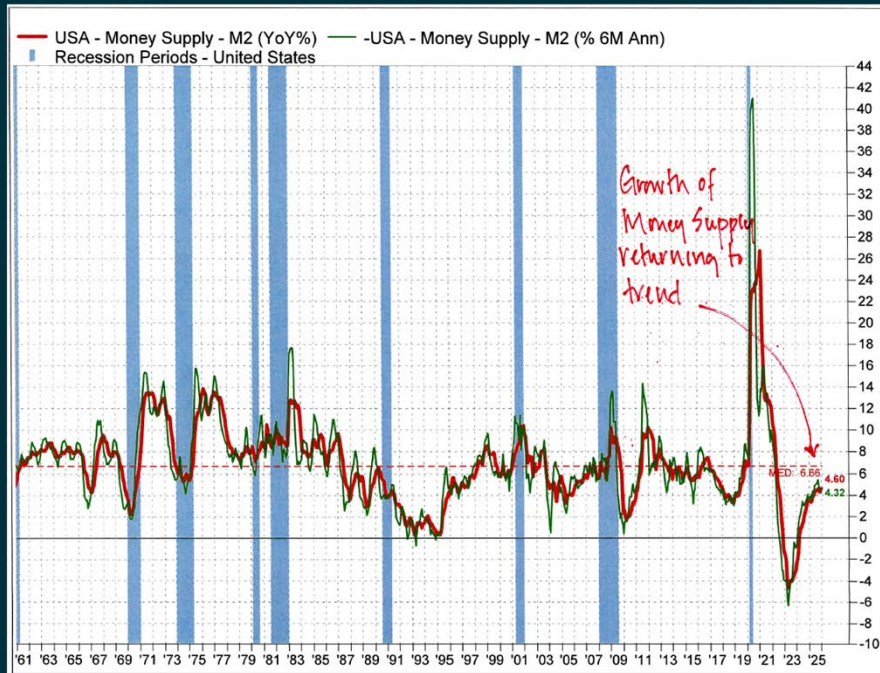
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Inflation & Tariffs



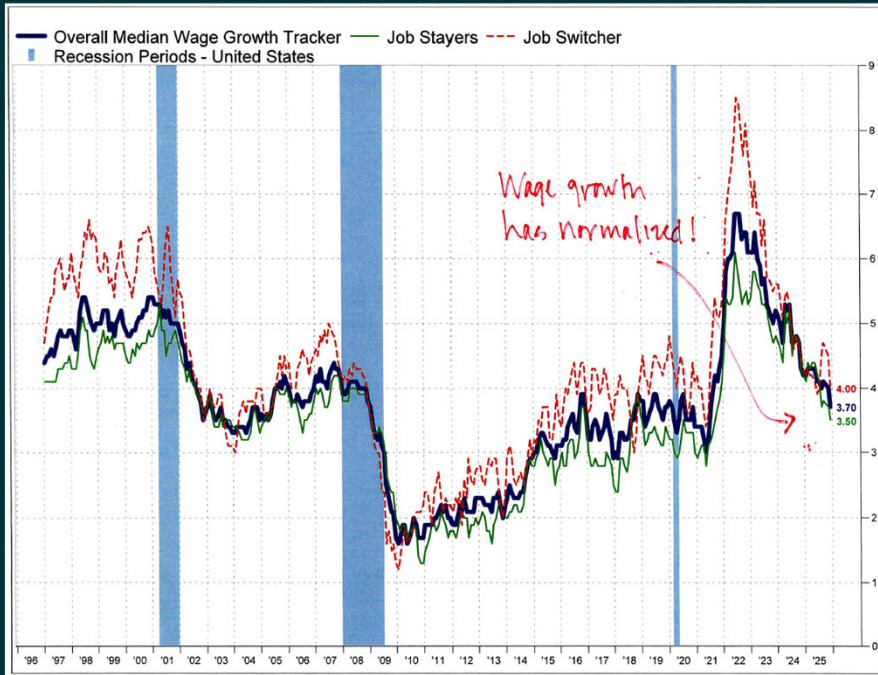
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Inflation & Tariffs



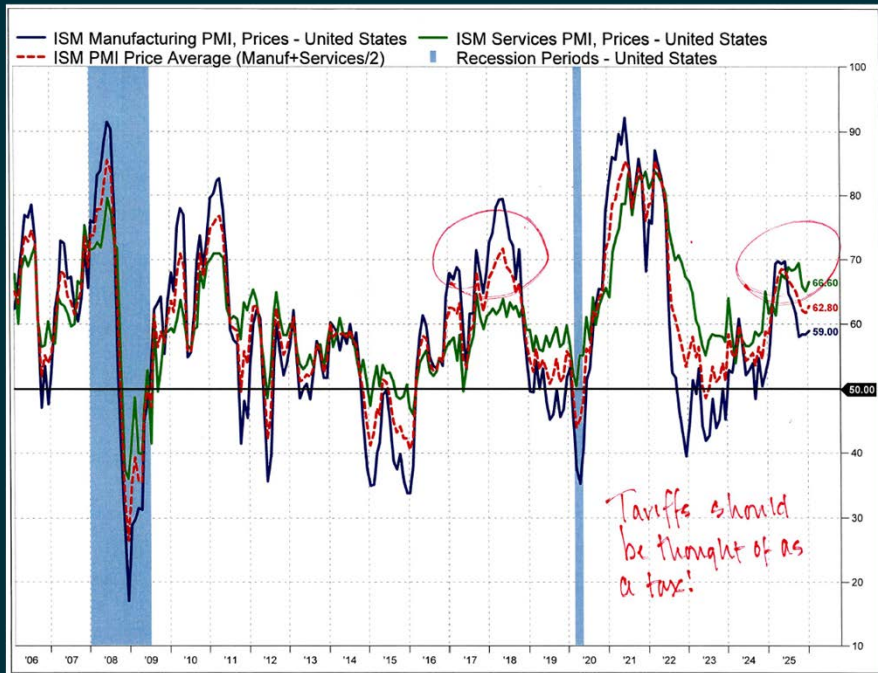
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Inflation & Tariffs



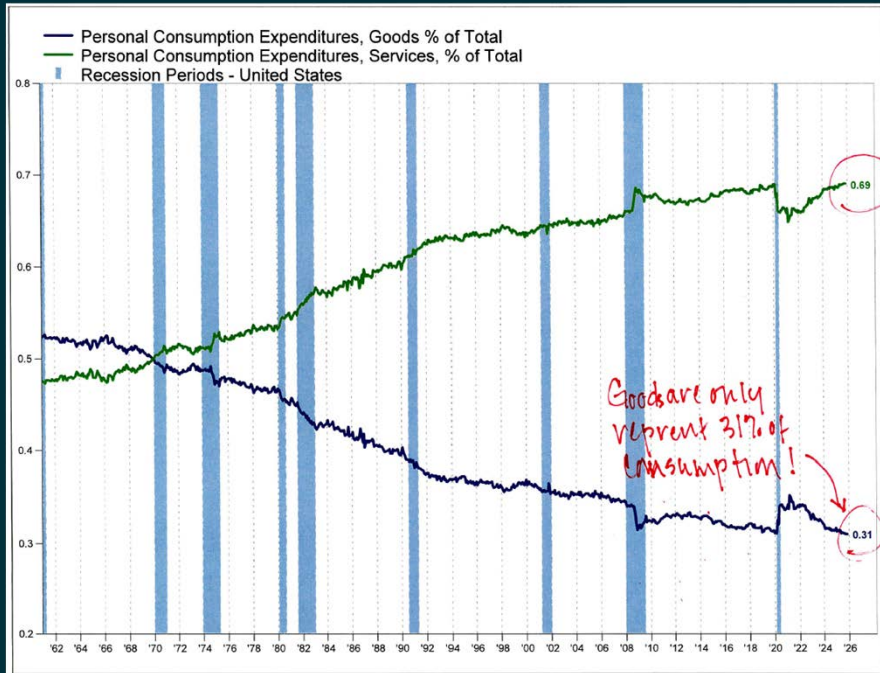
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Inflation & Tariffs



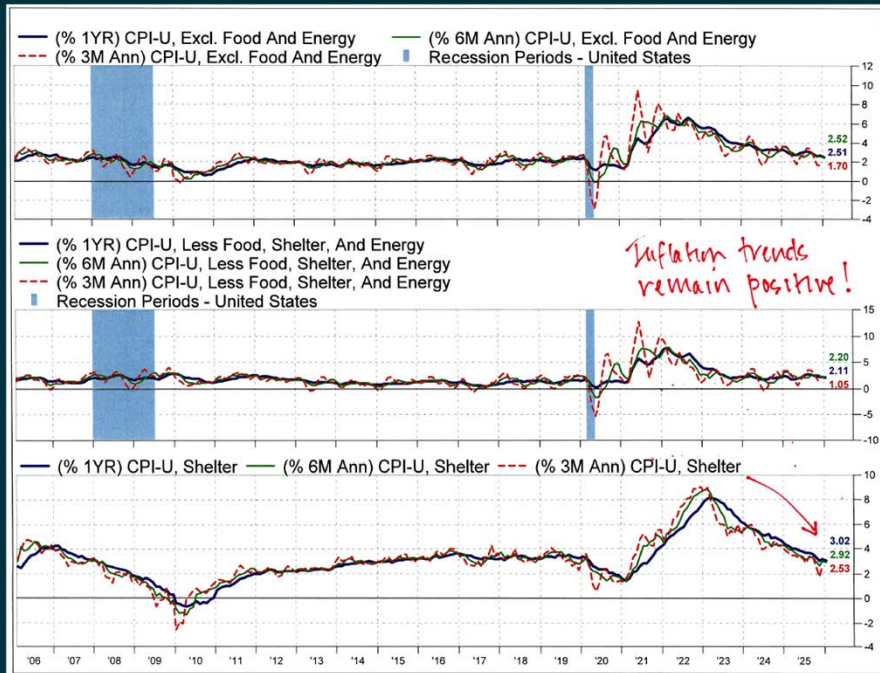
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Inflation & Tariffs



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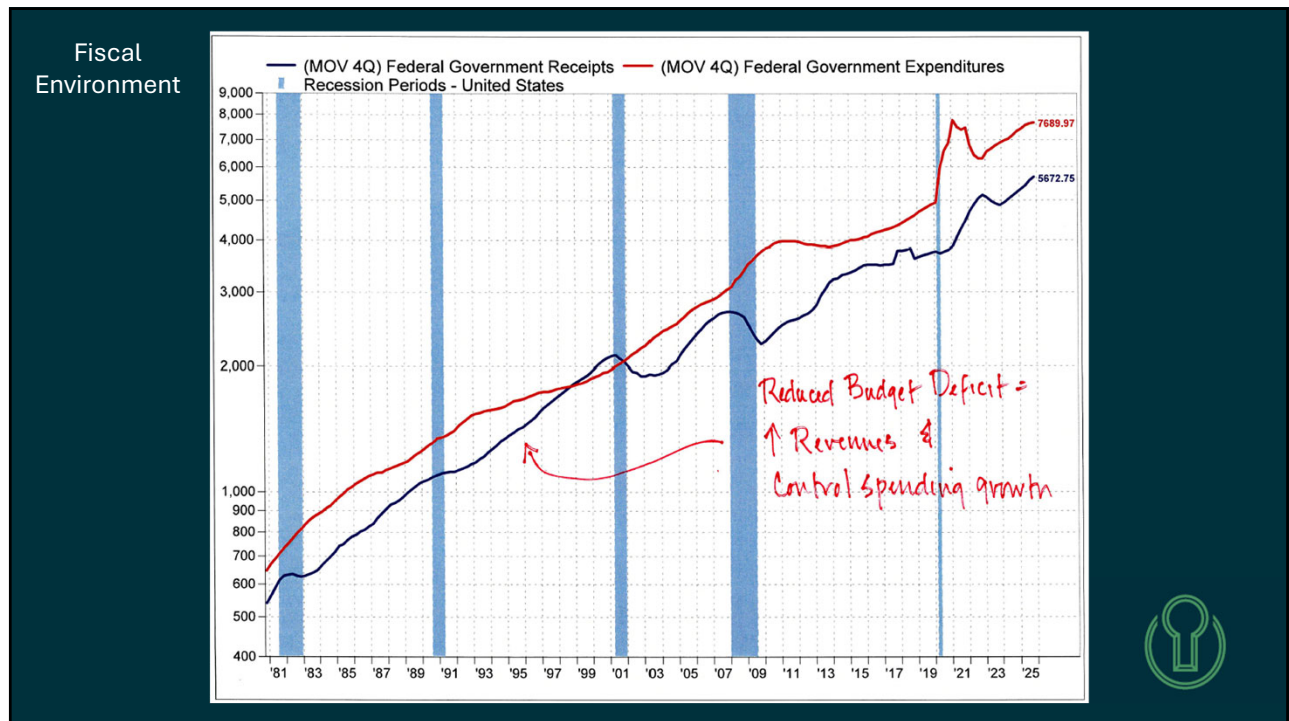
Inflation & Tariffs



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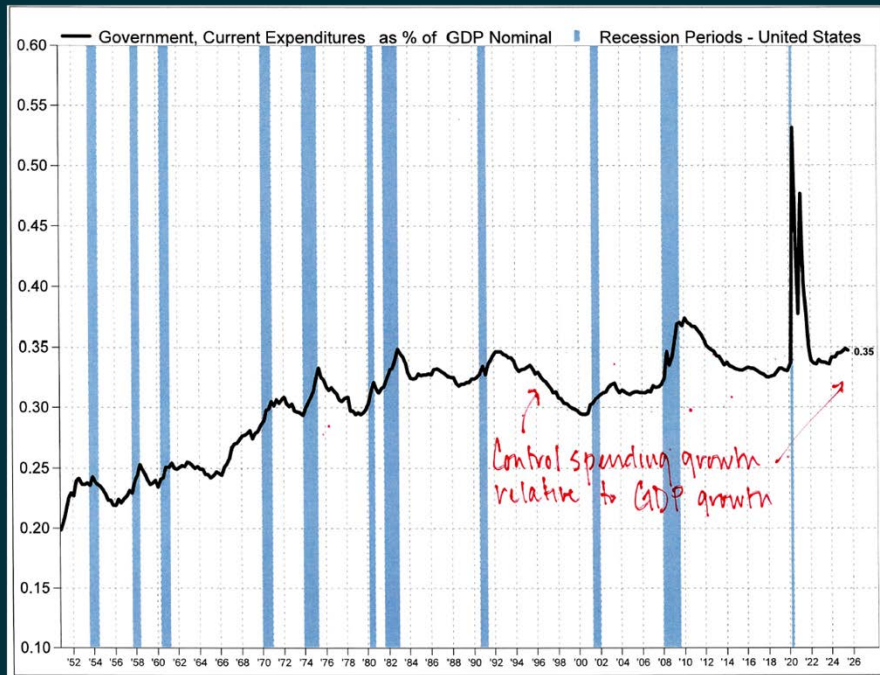
Fiscal Environment

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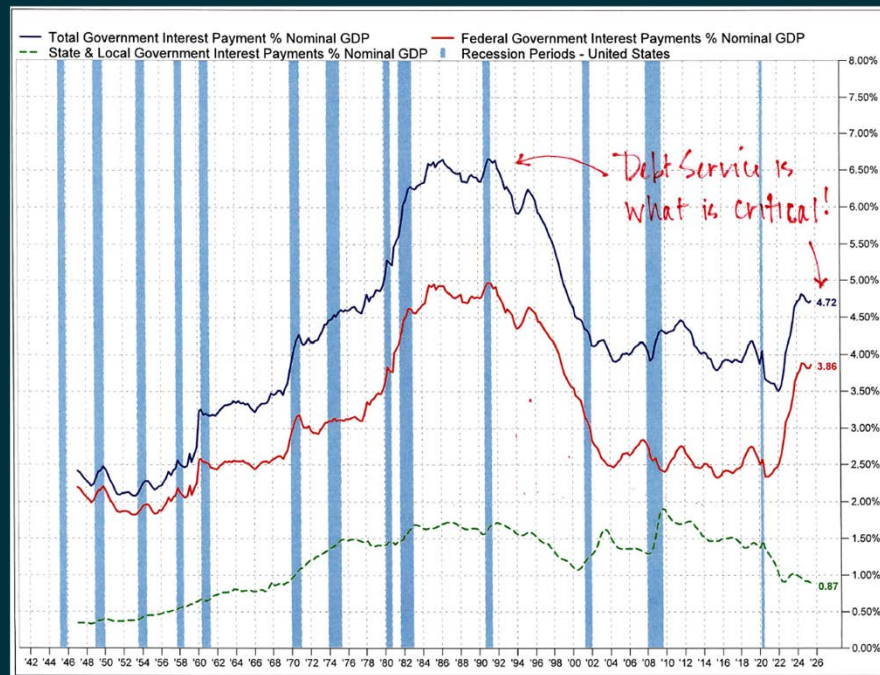
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Fiscal Environment



11

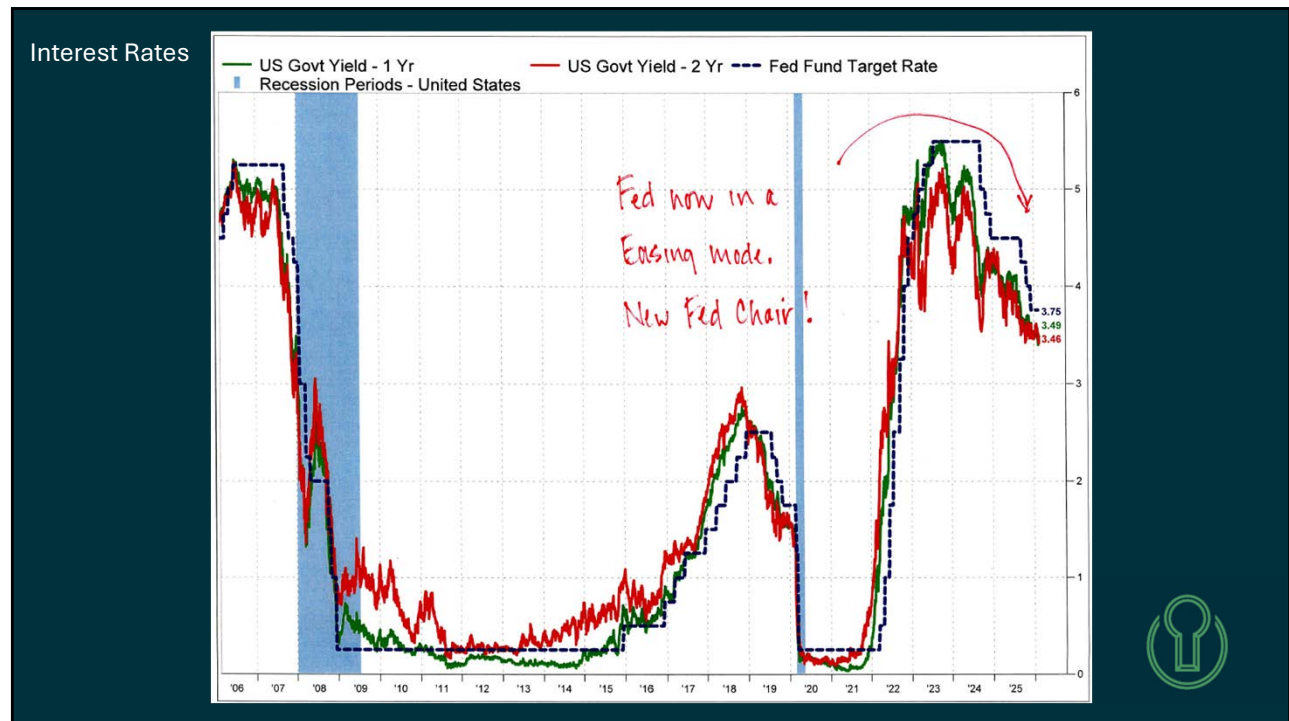
Fiscal Environment



12

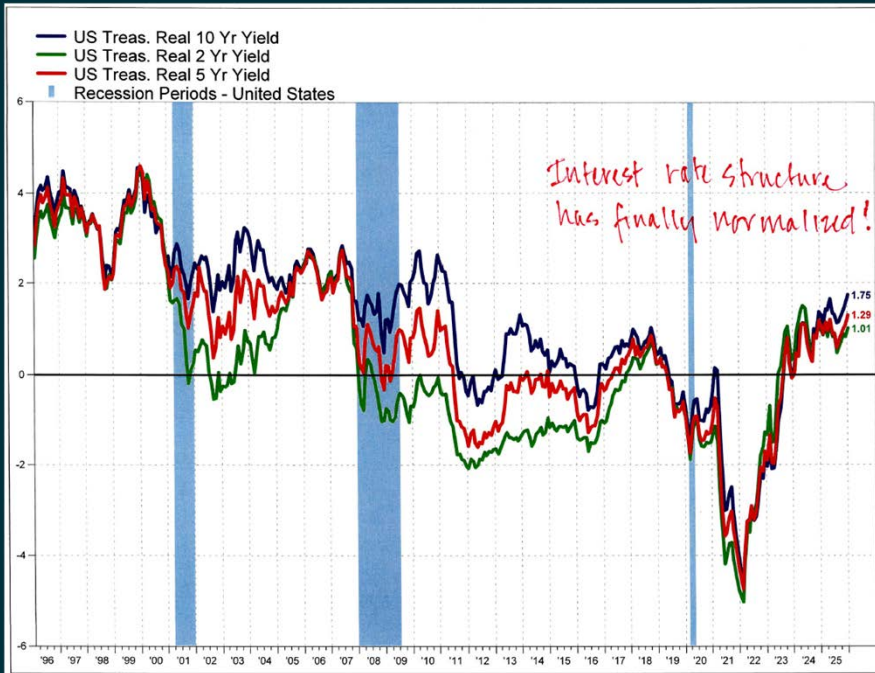
Interest Rates

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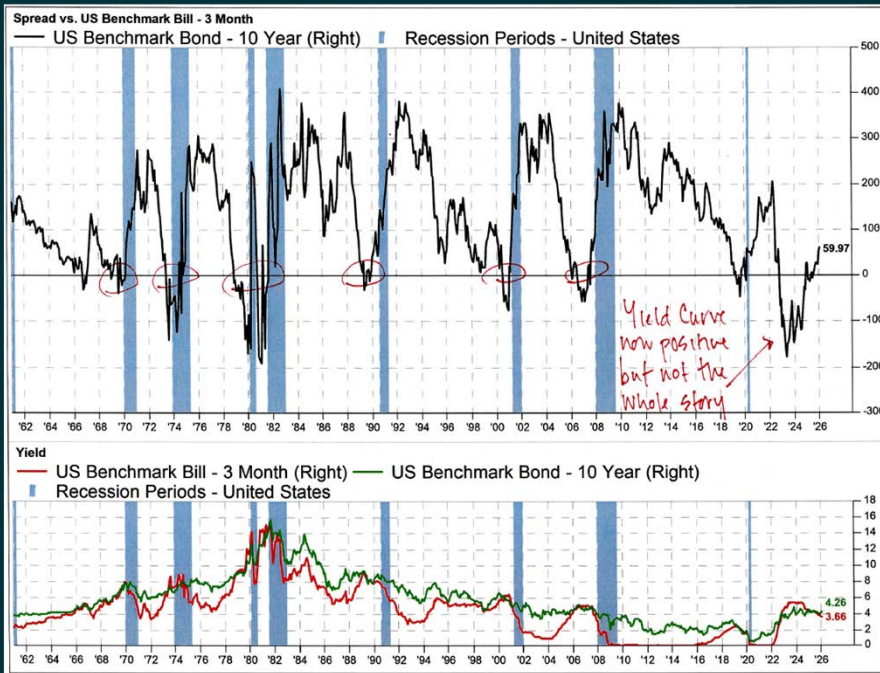
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Interest Rates



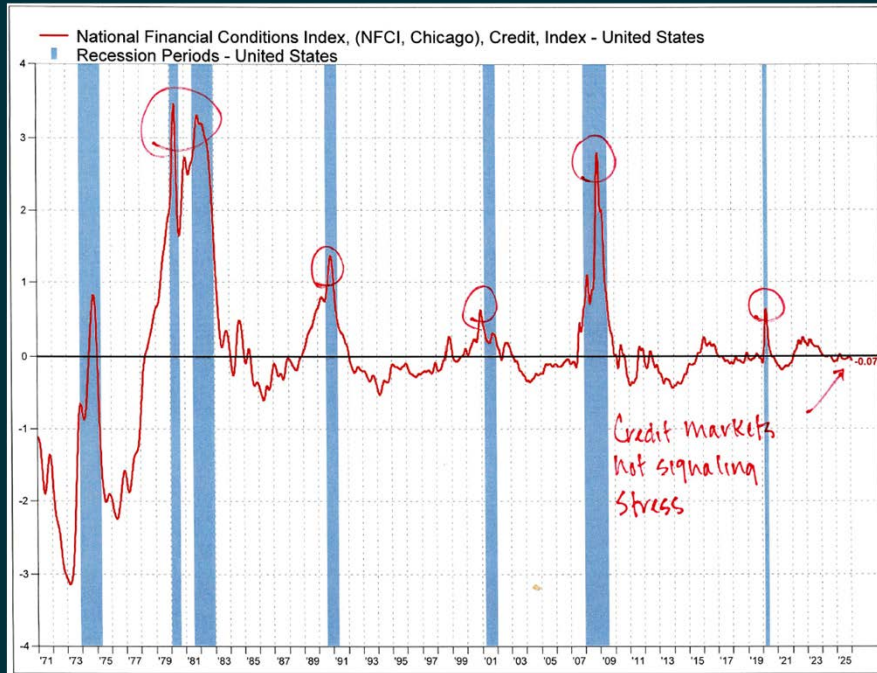
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Interest Rates



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Interest Rates

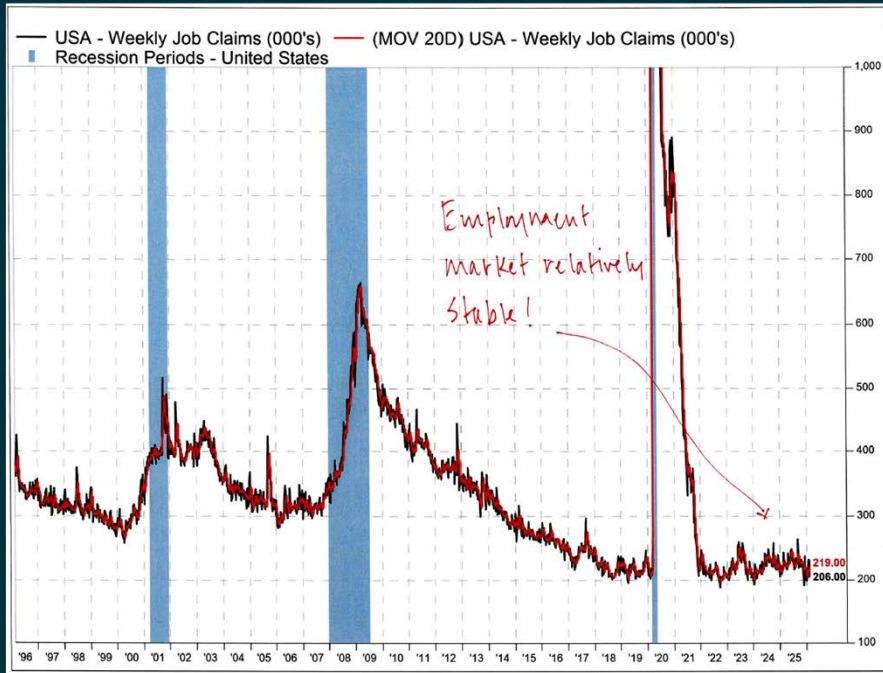


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Labor Market

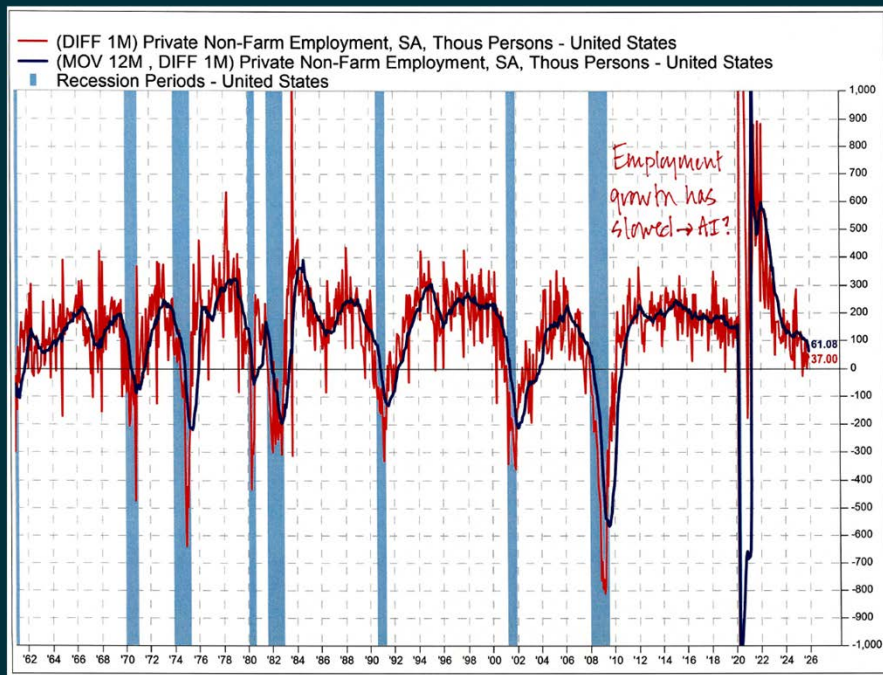
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Labor Market



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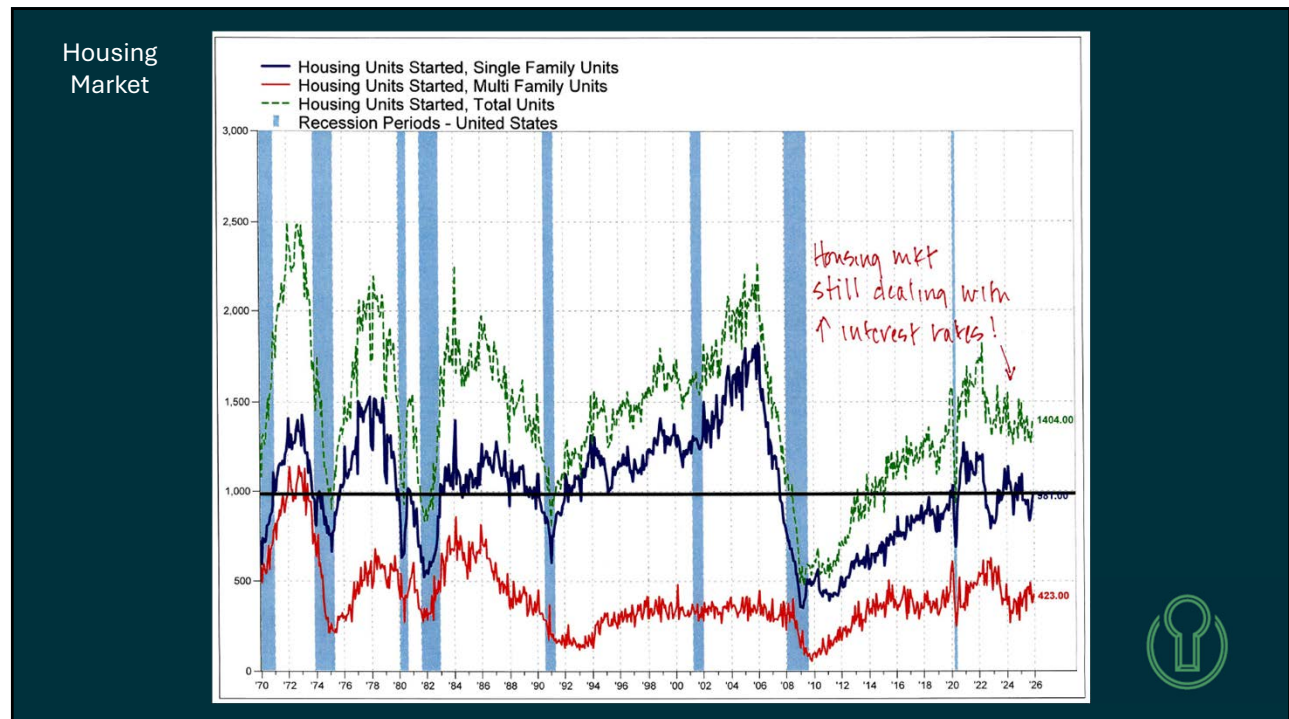
Labor Market



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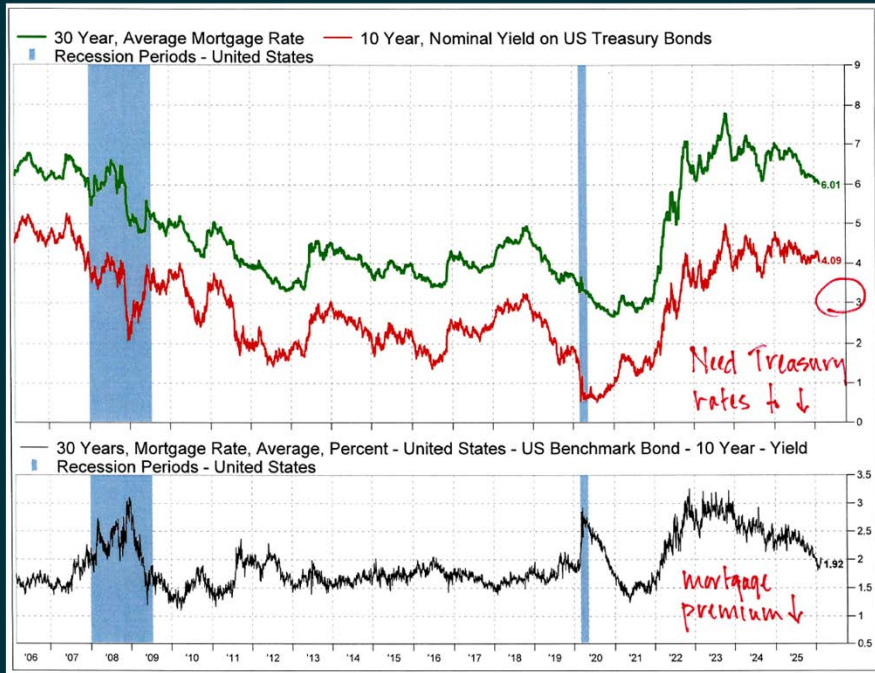
Housing Market

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22

Housing Market

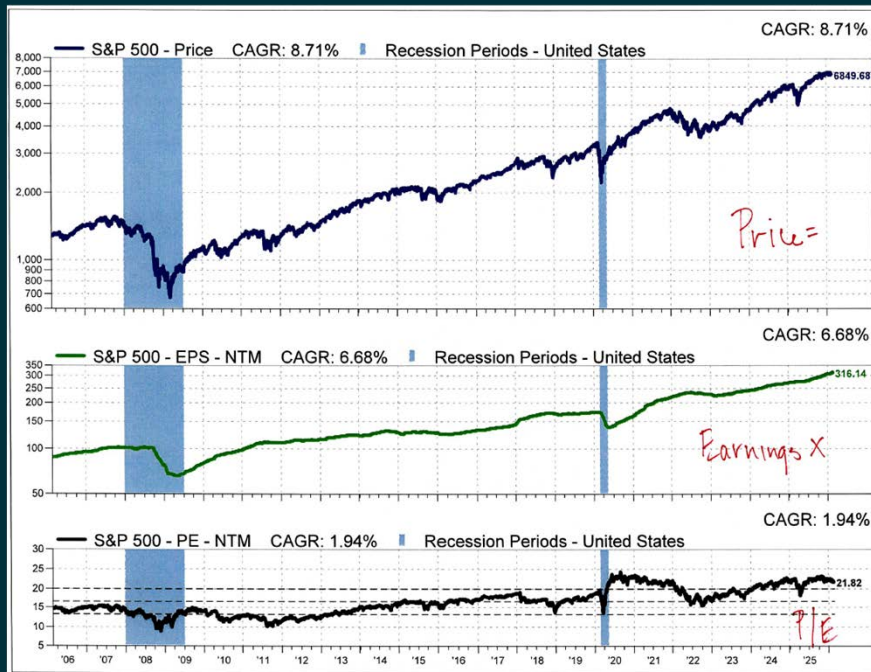


23

Earnings & Valuation

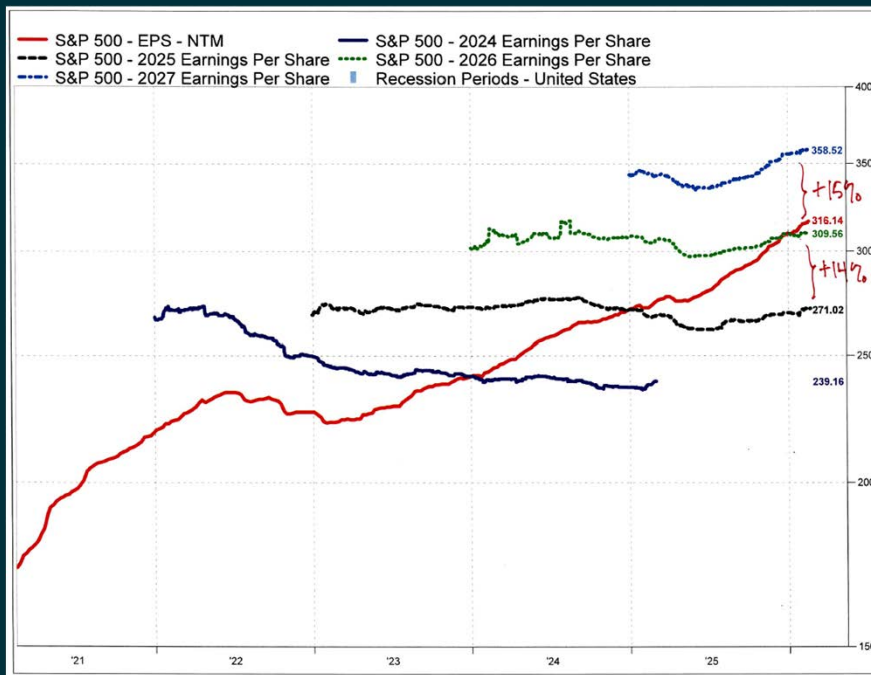
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Earnings & Valuation



25

Earnings & Valuation



26

Earnings & Valuation



9:30 – 10:25 a.m.

Advanced Excel: Hidden Secrets & Gems

Dr. Chris Harper, CPA, *Associate Professor of
Accounting, Seidman College of Business*

Advanced Excel: Hidden Secrets & Gems

Wisconsin Institute of CPAs
March 24, 2026

Advanced Excel: Hidden Secrets and Gems

Presented by:

Dr. Christopher Harper, CPA, MBA
Grand Rapids, Michigan



1

Meet Chris Harper



Dr. Christopher Harper, CPA, MBA – Chris is a CPA with the heart of a teacher. He is an assistant professor of accounting with Grand Valley State University's Seidman College of Business. He also serves as a senior manager and director of education for Hungerford CPAs + Advisors. Chris has been serving tax and accounting needs of closely held business and individuals since 1998. He has also owned and operated several of his own businesses throughout his career.

You can learn more about Chris by visiting his GVSU faculty page (<https://bit.ly/HarperGVSU>) and YouTube channel (<http://bit.ly/ChrisHarperYouTube>).

2

Advanced Excel: Hidden Secrets & Gems

Learning Objectives

- ❖ Evaluate less-known but powerful Excel functions.
- ❖ Challenge your level of intellectual curiosity as you unearth ways to utilize Excel in manners you may not have previously considered.
- ❖ Assess your mindset of professional skepticism that helps you explore the edges of Excel's capabilities.



Advanced Excel: Hidden Secrets & Gems

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3

Course Syllabus

Advanced Excel: Hidden Secrets and Gems Course Syllabus

Dive into the powerful -- yet often underutilized -- capabilities of Microsoft Excel. Designed for sophisticated users willing to approach spreadsheets from a unique perspective, this session encourages you to challenge the status quo by taking ordinary spreadsheets to the next level.

Topic	Approximate Time (Minutes)	Cumulative Time
Shortcuts and Tricks	5	5
VLOOKUP & XLOOKUP	5	5
Solver	6	6
Data Validation for Drop-down Menus	2	2
Custom Formatting	4	4
Pivot Tables	4	4
CONCATENATE	3	3
SMALL (and Intellectual Curiosity)	4	4
Linear Regression	5	5
Time Data	2	2
Live Data	5	5
CELL	4	4
Best Practices	4	4
Dessert	2	2
	55	

Advanced Excel: Hidden Secrets & Gems

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4

Advanced Excel: Hidden Secrets & Gems

Shortcuts and Tricks

Advanced Excel: Hidden Secrets and Gems	
Shortcuts and Tricks	
Shortcut	Action
Esc	"Escape" from a situation
Alt+Enter	Force a carriage return
F4 within formulas	Add absolute formula references
F4	Repeat previous action (good for highlighting cells during a manual reconciliation)
CTRL+X	Cut
CTRL+C	Copy
CTRL+V	Paste
CTRL+Z	Undo
CTRL+Y	Redo
CTRL+plus_key	Add a row
CTRL+minus_key	Delete a row
CTRL+F	Find specified text
CTRL+H	Replace specified text
CTRL+L	Fill cell with text from the adjacent left-hand cell
CTRL+B	Bold
CTRL+I	Italics
CTRL+U	Underline
CTRL+1	Call the "Format Cells" menu
CTRL+5	Strikethrough formatting
CTRL+Shift+1	Apply decimal format
CTRL+Shift+4	Apply currency format
CTRL+Shift+5	Apply percent format
End Directional_Arrow	Move to the end of a column or row
Shift+End+Directional_Arrow	Select a column or row of data
Shift+Spacebar	Select an entire row
CTRL+Spacebar	Select an entire column
Shift+Spacebar followed by CTRL+Spacebar	Select the entire worksheet
CTRL+Shift+Spacebar	Select all cells with data
CTRL+Shift+Right_Arrow	Select current cell plus all cells to its right-hand side
CTRL+Shift+Left_Arrow	Select current cell plus all cells to its left-hand side
CTRL+Home	Move to the beginning of a worksheet
CTRL+End	Move to the last cell with data for formatting
Tab	Move to the next cell (forward)
Shift+Tab	Move to the previous (backward)
F2	Edit cell contents
F9	Recalculate
Shift+F2	Create a note
Format Painter	Reapply one cell's format to another cell
Freeze Panes	Lock the visibility of specified rows and/or columns
Highlighting a Range for Quick Calculations	Quickly obtain a count, sum, and/or mean
Shift+Alt+Right_Arrow	Group rows and/or columns (calls Data Group)
Shift+Alt+Left_Arrow	Group rows and/or columns (calls Data Ungroup)
Formulas Menu	Helpful for selecting and utilizing formulas
Trace Precedents and Dependents	Useful for understanding and debugging formulas
Worksheet Navigation via Arrow Clicks	Useful for navigating among worksheets within a workbook
CTRL+Page_Down	Navigate to the subsequent worksheet within a workbook
CTRL+Page_Up	Navigate to the previous worksheet within a workbook
CTRL+Arrows	Quick navigation

Advanced Excel: Hidden Secrets & Gems

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5

VLOOKUP & XLOOKUP

Advanced Excel: Hidden Secrets and Gems			
VLOOKUP & XLOOKUP			
Station	Network	Market	
WZZM			
WNBC			
KABC			
WISH			
WWMT			
KLAS			
WXMI			
KFOX			
KNBC			
WOOD			
WLEX			

Station	Network	Market	Station
KABC	ABC	Los Angeles	KABC
KGUN	ABC	El Paso	KFOX
WOTV	ABC	Tucson (Sierra Vista)	KGUN
KAAL	ABC	Las Vegas	KLAS
KABY	ABC	Los Angeles	KNBC
KAEF	ABC	Indianapolis	WISH
WBKO	ABC	Lexington	WLEX
WBKP	ABC	Grand Rapids-Kalamazoo-Battle Creek	WOOD
WBMA	ABC	Grand Rapids-Kalamazoo-Battle Creek	WOTV
WBND	ABC	Grand Rapids-Kalamazoo-Battle Creek	WWMT
WBRZ	ABC	Grand Rapids-Kalamazoo-Battle Creek	WXMI
WBUP	ABC	Grand Rapids-Kalamazoo-Battle Creek	WZZM
WCDC	ABC	Rochester-Mason City-Austin	KAAL
WCFT	ABC	Wichita-Hutchinson Plus	KAAS
WCHS	ABC	San Antonio	KABB
WCIV	ABC	Bakersfield	KABE
WCJB	ABC	Sioux Falls(Mitchell)	KABY
WCPO	ABC	Lafayette, La	KADN
WCTI	ABC	Eureka	KAEF
WCVB	ABC	Chicago	WBMM
WDAY	ABC	Washington, DC (Hagerstown)	WBDC
WDAZ	ABC	Dayton	WBDT
WDHN	ABC	Baltimore	WBFF
WDIO	ABC	Miami-Ft. Lauderdale	WBFS
WDTN	ABC	Binghamton	WBGH
WEAR	ABC	Columbia, SC	WBHQ
WEHT	ABC	Panama City	WBIF
WENY	ABC	Knoxville	WBIR
WEWS	ABC	Alpena	WBKB
WFAA	ABC	Louisville	WBKI
WFTS	ABC	Bowling Green	WBKO
WFTV	ABC	Marquette	WBKP
WGGB	ABC	Birmingham (Anniston and Tuscaloosa)	WBMA
WGNO	ABC	Montgomery (Selma)	WBMM

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Solver

Advanced Excel: Hidden Secrets and Gems Solver				
Utilization of a constrained resource (lumber)				
Board-feet available				
	Table	Chair	Desk	Totals
Demand	100	400	200	
Board-feet required per unit	50	20	70	
Cost per board-foot	\$5	\$5	\$5	
Sales Price per Unit	\$600	\$300	\$800	
COGS per Unit	\$250	\$100	\$350	
CM per Unit	\$350	\$200	\$450	
CM per board-foot	\$7.000	\$10.000	\$6.429	
Quantity Sold	0	0	0	
Total board-feet of lumber	0	0	0	0
Contribution Margin	\$0	\$0	\$0	\$0

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Data Validation for Drop-Downs

	A	B	C	D
1	Advanced Excel: Hidden Secrets and Gems			
2	Data Validation for Drop-downs			
3				
4				
5	Please select a color.			
6				
7				

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Custom Formatting

	A	B	C	D	E	F
1	Advanced Excel: Hidden Secrets and Gems					
2	Custom Formatting					
3						
4						
5						
6					(12%)	
7					(12)%	
8					(12)%	
9				January 23 2026		
10				Friday, January 23, 2026		
11				January 2026		
12				1/23/26		
13				1/23/2026		
14				Friday		
15						

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Pivot Tables

	A	B	C	D	E	F	G	H	I
1	Advanced Excel: Hidden Secrets and Gems								
2	Pivot Tables								
3									
4	Employee	Office	Year	Chargeable Hours	Non-Chargeable Hours	Total Hours	Chargeable %	Revenue	Revenue per Chargeable Hour
5	Norma Bell	Traverse City	2025	1,918	313	2,231	86.0%	\$560,056	\$292
6	Joyce Butler	Lansing	2025	1,589	421	2,010	79.1%	\$357,525	\$225
7	Doris Clark	Grand Rapids	2025	1,686	621	2,307	73.1%	\$468,708	\$278
8	Denise Brown	Detroit	2025	1,906	418	2,324	82.0%	\$154,386	\$81
9	Kathleen Ramirez	Kalamazoo	2025	1,704	864	2,568	66.4%	\$434,520	\$255
10	Eric Gonzales	Traverse City	2025	2,192	842	3,034	72.2%	\$491,008	\$224
11	Bonnie Evans	Traverse City	2025	2,372	350	2,722	87.1%	\$657,044	\$277
12	Diana Long	Traverse City	2025	2,019	378	2,397	84.2%	\$226,128	\$112
13	Jason Griffin	Traverse City	2025	2,022	559	2,581	78.3%	\$214,332	\$106
14	Amy Washington	Grand Rapids	2025	1,976	554	2,530	78.1%	\$241,072	\$122
15	Anne White	Grand Rapids	2025	1,850	694	2,544	72.7%	\$201,650	\$109
16	Jennifer Williams	Grand Rapids	2025	1,662	520	2,182	76.2%	\$154,566	\$93
17	Rose Flores	Grand Rapids	2025	2,262	861	3,123	72.4%	\$748,722	\$331
18	Barbara Garcia	Lansing	2025	1,824	665	2,489	73.3%	\$592,800	\$325
19	Justin King	Grand Rapids	2025	2,163	501	2,664	81.2%	\$664,041	\$307
20	Richard Carter	Grand Rapids	2025	1,557	727	2,284	68.2%	\$319,185	\$205
21	Henry Martinez	Lansing	2025	2,023	213	2,236	90.5%	\$273,105	\$135
22	Brenda Hughes	Kalamazoo	2025	1,929	952	2,881	67.0%	\$403,161	\$209
23	Nancy Hall	Traverse City	2025	1,626	588	2,214	73.4%	\$373,980	\$230

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Concatenate

	A	B	C	D
1	Advanced Excel: Hidden Secrets and Gems			
2	CONCATENATE			
3				
4	First Name	Last Name	Letter Grade	Full Name
5	David	Shea	B	
6	Dallas	Morton	C+	
7	Balraj	Cochran	C+	
8	Chandler	Weiss	B	
9	Thomas	Bates	B	
10	Tyler	Rivas	B-	
11	Mitchell	Hayes	C	
12	Daniel	Hickman	C+	
13	Kathy	Greer	B	
14	Tara	Rowland	D+	
15	Trevor	Chang	C	
16	Kacey	Jennings	B	
17	Grant	Norris	C+	
18	Ethan	Le	A-	
19	Eleanor	Powell	C+	
20	Kevin	Delgado	C-	
21	Phuong	Malone	A-	
22	Samantha	Griffith	C	
23	Bailey	Hinton	C+	
24	Daniel	Stanton	B	
25	John	Clayton	C	
26	Emily	Lopez	C-	
27	Hailey	Koch	B-	
28	Cole	Newton	B-	
29	Jenna	Roman	D+	
30	Matthew	Davies	C	
31	Hattie	Little	D	
32	Nicholas	Bond	C-	
33	Alexandria	Preston	B	

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SMALL (and Int. Curiosity)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Advanced Excel: Hidden Secrets and Gems															
2	SMALL (and Int. Curiosity)															
3																
4	First Name	Last Name	Quiz #1	Quiz #2	Quiz #3	Quiz #4	Quiz #5	Quiz #6	Quiz #7	Quiz #8	Quiz #9	Quiz #10	Quiz #11	Quiz #12	Lowest Quiz	Second Lowest Quiz
5	David	Shea	7.00	7.50	10.00	9.00	10.00	10.00	0.00	10.00	9.00	10.00	10.00	9.00		
6	Dallas	Morton	9.00	7.00	0.00	0.00	10.00	10.00	0.00	10.00	9.00	8.00	10.00	10.00		
7	Balraj	Cochran	10.00	9.50	9.00	10.00	10.00	8.00	10.00	9.00	9.00	10.00	10.00	9.00		
8	Chandler	Weiss	9.00	6.00	10.00	7.00	10.00	10.00	10.00	7.00	10.00	10.00	10.00	10.00		
9	Thomas	Bates	10.00	6.50	10.00	9.00	10.00	7.00	10.00	10.00	10.00	10.00	10.00	10.00		
10	Tyler	Rivas	10.00	7.50	10.00	0.00	10.00	9.00	10.00	9.00	10.00	10.00	10.00	10.00		
11	Mitchell	Hayes	7.00	0.00	9.00	9.00	8.00	9.00	10.00	9.00	9.00	10.00	0.00	6.00		
12	Daniel	Hickman	9.00	6.50	10.00	7.00	6.00	10.00	0.00	10.00	8.00	0.00	10.00	10.00		
13	Kathy	Greer	10.00	6.50	9.00	6.00	10.00	9.00	10.00	10.00	10.00	10.00	10.00	10.00		
14	Tara	Rowland	8.00	7.50	10.00	9.00	10.00	10.00	0.00	10.00	9.00	10.00	10.00	9.00		
15	Trevor	Chang	10.00	0.00	10.00	7.00	10.00	10.00	10.00	8.00	10.00	9.00	10.00	10.00		
16	Kacey	Jennings	9.00	7.00	10.00	9.00	10.00	8.00	10.00	8.00	9.00	9.00	10.00	8.00		
17	Grant	Norris	9.00	5.00	9.00	10.00	9.00	9.00	0.00	10.00	9.00	9.00	10.00	10.00		
18	Ethan	Le	8.00	6.00	10.00	10.00	9.00	9.00	10.00	10.00	9.00	9.00	10.00	10.00		
19	Eleanor	Powell	0.00	6.50	10.00	9.00	10.00	10.00	10.00	10.00	10.00	9.00	10.00	10.00		
20	Kevin	Delgado	8.00	7.00	9.00	7.00	9.00	9.00	10.00	10.00	9.00	10.00	10.00	10.00		
21	Phuong	Malone	8.00	7.50	10.00	10.00	10.00	10.00	10.00	10.00	10.00	9.00	10.00	10.00		
22	Samantha	Griffith	10.00	0.00	9.00	9.00	10.00	10.00	10.00	8.00	10.00	10.00	10.00	10.00		
23	Bailey	Hinton	9.00	6.00	10.00	6.00	9.00	8.00	10.00	10.00	0.00	10.00	10.00	10.00		
24	Daniel	Stanton	10.00	9.00	10.00	10.00	10.00	9.00	10.00	10.00	9.00	10.00	10.00	10.00		
25	John	Clayton	9.00	0.00	9.00	9.00	10.00	8.00	10.00	9.00	9.00	10.00	10.00	10.00		
26	Emily	Lopez	9.00	6.50	10.00	0.00	9.00	8.00	10.00	8.00	10.00	8.00	10.00	6.00		

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Linear Regression

	A	B	C	D
1	Advanced Excel: Hidden Secrets and Gems			
2	Linear Regression			
3				
4	Observation	Gross Sales	# Customers	
5	1	\$81,654	2,690	
6	2	\$90,901	2,965	
7	3	\$91,242	2,999	
8	4	\$89,331	2,998	
9	5	\$85,988	2,909	
10	6	\$95,300	3,064	
11	7	\$83,913	2,866	
12	8	\$93,685	3,123	
13	9	\$95,542	3,296	
14	10	\$103,877	3,618	
15	11	\$93,582	3,250	
16	12	\$109,744	3,622	
17	13	\$94,273	3,269	
18	14	\$90,162	3,161	
19	15	\$94,671	3,288	
20	16	\$93,491	3,198	
21	17	\$61,288	1,983	
22	18	\$64,211	2,066	
23	19	\$63,345	2,144	
24	20	\$58,863	2,049	
25	21	\$57,295	2,007	
26	22	\$58,368	1,957	
27	23	\$55,363	1,951	
28	24	\$49,699	1,769	
29	25	\$64,311	2,102	
30	26	\$67,747	2,263	
31	27	\$59,526	2,034	
32	28	\$67,028	2,196	
33	29	\$61,482	2,076	
34	30	\$60,430	2,052	

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Time Data

	A	B	C	D	E	F	G
1	Advanced Excel: Hidden Secrets and Gems						
2	Time Data						
3							
4		Slide #	Cumulative Time (Minutes)	Time of Day	GAAP Alternatives: Finding a Safe Harbor in the Perfect Storm of Accounting Updates March 24, 2026		
5		1	1	12:31 PM	# Slides		43
6		2	2	12:32 PM	Total Length (# Minutes)		50.00
7		3	3	12:33 PM	Introductory Buffer (# Minutes)		-
8		4	5	12:34 PM	Per Slide (# Minutes)		1.16
9		5	6	12:35 PM	Start Time		12:30 PM
10		6	7	12:36 PM			
11		7	8	12:38 PM			
12		8	9	12:39 PM			
13		9	10	12:40 PM			
14		10	12	12:41 PM			

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Live Data

	A	B	C	D	E	F	G	H	I	J	K
1	Advanced Excel: Hidden Secrets and Gems										
2	Live Data										
3											
4	City	Latitude	Longitude								
5	Grand Rapids, Michigan	42.96	(85.67)								
6	Kalamazoo, Michigan	42.29	(85.59)								
7	Flint, Michigan	43.02	(83.69)								
8	Ann Arbor, Michigan	42.28	(83.75)								
9											
10											
11											
12											
13											
14											
15		Latitude	Longitude	South of GR?	East of GR?	North of Kzoo?	West of Flint?	Inside the Box?			
16	Milwaukee	43.05	(87.95)	FALSE	FALSE	TRUE	TRUE	FALSE			
17	Madison, Wisconsin	43.07	(89.38)	FALSE	FALSE	TRUE	TRUE	FALSE			
18	Whitewater, Wisconsin	42.84	(88.74)	TRUE	FALSE	TRUE	TRUE	FALSE			
19	Battle Creek, Michigan	42.31	(85.20)	TRUE	TRUE	TRUE	TRUE	TRUE			
20	Lansing, Michigan	42.73	(84.55)	TRUE	TRUE	TRUE	TRUE	TRUE			
21	Detroit	42.33	(83.05)	TRUE	TRUE	TRUE	FALSE	FALSE			
22	Atlanta	33.76	(84.39)	TRUE	TRUE	FALSE	TRUE	FALSE			

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CELL

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Advanced Excel: Hidden Secrets and Gems															
2	CELL															
3																
4																
5	=MID(@CELL("filename",A1),FIND(" ");@CELL("filename",A1))+1,300)															
6																
7	C:\Users\Marcie\AppData\Local\Microsoft\Windows\NetCache\Content.Outlook\T1X2289Q\Advanced Excel - Hidden Secrets and Gems - 3-24-2026.xlsm CELL															
8																

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Best Practices

- ✓ Use formulas for all calculated values
- ✓ Link data among tabs when appropriate
- ✓ Text boxes can be your friend
- ✓ Using Format Painter
- ✓ Use the “Formulas” menu
- ✓ Internet searches can be a good resource
- ✓ Paste Special is often helpful
- ✓ Clicking on formulas to see elements
- ✓ Use multiple tabs to keep the layout manageable

10:40 – 11:40 a.m.

Modern Finance, Smarter Tools: Practical AI for Decision-Makers

Mary Newby, MSBA, *Data Analytics Consultant, 7Rivers, Inc.*



Modern Finance, Smarter Tools: Practical AI for Decision-Makers

Mary Newby, Data Consultant, 7Rivers

Where Data Flows // Business Grows

What is AI?

Artificial Intelligence (AI) is a software that can:

- Understand written language
- Recognize patterns in data
- Generate content and analysis
- Answer complex questions

AI tools learn from large datasets to provide useful outputs. It helps professionals work faster and smarter.

Why AI matters?

Finance professionals spend time on:

- Manual data work
- Research
- Writing reports
- Excel troubleshooting

AI can help:

- Save time on repetitive tasks
- Reduce manual effort
- Improve analysis
- Speed up research

Free AI Tools



- Writing assistance
- Research help
- Excel formulas



- Excel assistance
- Outlook writing
- Document summaries



- Research
- Writing help

Uses for AI in Finance

Research

AI can help explain complex topics quickly, like explaining tax rules and comparing accounting treatments.

Analyze Financial Data

Turn data into insights by creating charts from data, identifying trends, suggesting metrics, and explaining results.

Excel and DAX Support

Use AI to write Excel formulas, create DAX formulas, debug errors, and explain formulas.

Report Writing & Documentation

Draft professional financial communications quickly. Communications like monthly financial summaries, variance explanations, client letters, and audit documentation.

Process Automation & Checklists

Standardize repetitive processes using AI. Can be used for month-end close checklists, tax preparation workflows, and internal control documentation.

Client Communication

AI can help write professional and clear client messages. Explain tax changes, answer questions, draft emails, and provide financial explanations.

Training

Use AI to stay up to date on the latest learnings and trainings. It can be used to understand regulations, train new staff, and explain concepts.

Using AI for research

AI can help explain complex topics quickly leading to faster understanding, plain-language explanations, and a quicker starting point.

Creating Financial Visualizations

AI can help turn data into insights leading to understanding trends faster, improved presentations, and explanations of financial results.

Using AI Excel & Dax Support

AI in spreadsheets helps save time, reduces frustration, and improves accuracy.

Piece of Advice

How to Ask Better Questions

Better prompts produce better results. Include the following in your prompt to yield the best results:

- Context
- Clear Instructions
- Desired format

Example: Instead of “Explain revenue”

Use “Explain revenue recognition under GAAP in simple terms for a small business owner.”



Using AI Safely

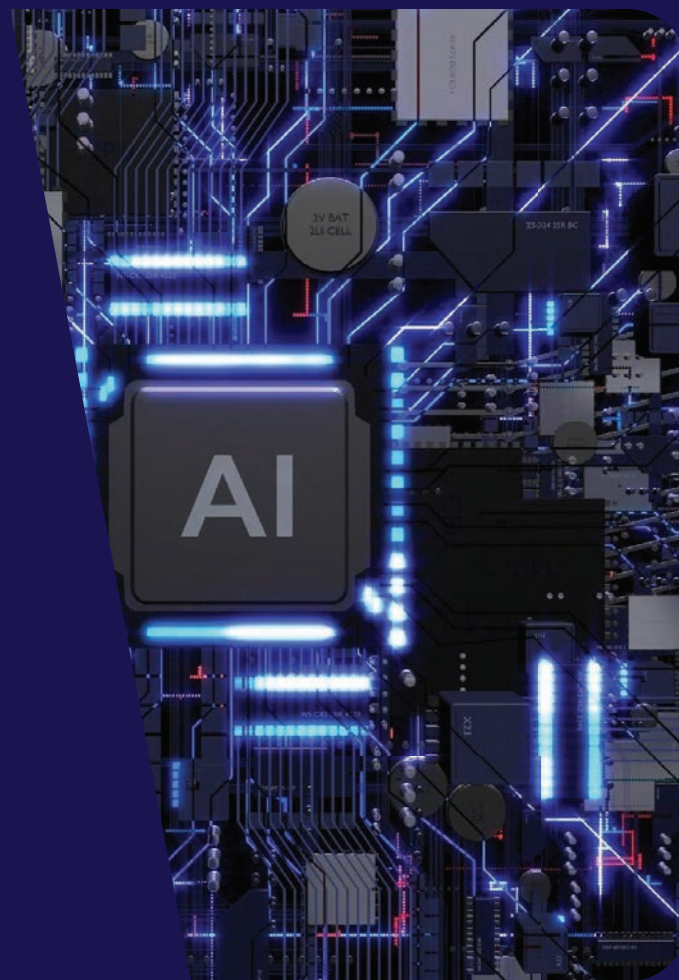
When using AI do NOT enter:

- Client financial statements
- SSN
- Tax returns
- Confidential information

Follow your firm policies regarding online safety.

Use approved tools when available.

AI is not perfect and can make mistakes.



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