

Agenda

Day 1 Sessions

» 7:30 a.m. REGISTRATION

» 8:00 a.m. GENERAL SESSION

» Tech Update

What to do? What to buy? What to watch for? What to avoid? Get your answers in Tech Update. Specific topics included in this session are: technology trends, recommended hardware specifications, applications and licensing, and security. This session provides concentrated exposure to technology that may reveal ideas, trends, and options that you had not discovered through your normal channels.

» 9:40 a.m. BREAK

» 9:50 a.m.

MORNING BREAKOUT SESSIONS

2 CPA Firm Technologies

What strategies can help your firm today and tomorrow? What technologies can support those strategies? The latest audit and tax technologies – in addition to niche areas such as collaborative accounting, payroll, and SALT – are covered in this session. You will also learn about supporting technologies such as practice management, document management, workflow, portals, eSignature, and email encryption. Come with your questions and get insights on technologies that make public practice accounting better!

3 Data Analysis with Power Pivot

Power Pivot connects directly to most data sources and works with Power Query for superior data imports and transformations. Further, DAX functions allow users to create sophisticated calculations, and the relational functionality of Power Pivot provides all the tools necessary for analyzing data from multiple sources. Participate in this session and realize superior reporting and analytical results by putting Power Pivot to use immediately.

4 Security – A Practical Guide

For many, security incidents are not a matter of “if” but a matter of “when.” Therefore, you should use an end-to-end approach for protecting your data and in this session, you will learn how to do just that. Specific topics covered include multi-factor authentication, password managers, encryption, mobile device management, anti-virus, firewalls, policies, and other tools that you can implement immediately. Remember, spending more does not make you more secure, but doing the right things can.

» 11:30 a.m. LUNCH

» 12:30 p.m.

AFTERNOON BREAKOUT SESSIONS

5 Evaluating Technology Controls

Technology controls are more important than ever. In the absence of properly-functioning controls, entire systems and the data contained therein can quickly become infected, breached, or simply stop functioning. Auditors, business managers, and consultants all need to know how to evaluate critical technology controls and in this session, you will learn the best ways to evaluate essential information technology general controls and application controls.

6 Excel Financial Modeling Best Practices

Excel remains the tool of choice for many professionals when building financial models, including forecasted financial statements and budgets. Yet many of these same professionals have never received any training on the best practices associated with generating financial modeling spreadsheets. Participate in this session to learn many amazing techniques that will not only help you save valuable time when building your Excel-based models, but will also improve the accuracy and quality of your results.

7 Personal Technologies

Technology impacts us not only in business, but also at home and sometimes it can be difficult to distinguish between the two! In this session, you will learn about technologies you can use to help you get things done. Examples of tools discussed include personal hardware, apps, speech-to-text, notetaking tools, and audio-visual technologies. Make plans to participate in this session so that you can take full advantage of the technologies available to you.

» 2:10 p.m. BREAK

» 2:20 p.m. GENERAL SESSION

Office 365 – New Tools, New Tricks

As part of the ever-changing nature of Office 365, Microsoft has added several new tools – including Teams, Flow, Planner, Stream, and PowerApps – to the suite and has also added many new collaborative features to Excel, Word, and other existing applications. Join us for this productivity-enhancing session in which you will learn about the new opportunities in Office 365 and how to improve your productivity by taking advantage of them.

Day 2 Sessions

» 7:30 a.m. REGISTRATION

» 8:00 a.m. GENERAL SESSION

» Emerging Technologies

The next wave of technology is arriving now and you will need to choose from various technologies and tools to maintain and improve your productivity. Each emerging technology – among them Artificial Intelligence, Big Data, and Machine Learning – will be explained including why it is important and how it works. Additionally, actual products will be used as examples in each category to turn this discussion from a theoretical overview to a practical selection and how-to cookbook.

» 9:40 a.m. BREAK

» 9:50 a.m.

MORNING BREAKOUT SESSIONS

11 Client Accounting and the Outsourced CFO

Technology is transforming small business accounting as companies and their CPA firms are turning to Cloud-based solutions not just to “keep the books,” but rather to revolutionize business operations. The technology behind solutions from companies such as AccountantsWorld, Intuit, Sage, Xero, Zoho, and others places the focus on value-added services, instead of time-consuming data entry tasks. Participate in this session to learn how all parties can benefit from this new paradigm of small business accounting.

12 Extending the Power of Excel with Useful Add-ins

There are many free or low-cost add-ins available to enhance Excel. Included are Microsoft’s Fuzzy Lookup add-in along with countless apps from the Office Store. Additionally, tools such as RiskAMP facilitate Monte Carlo simulations; ActiveData provides users with the means to perform sophisticated audit techniques; and the Analysis ToolPak streamlines a full range of statistical calculations. This session will identify and demonstrate useful add-ins to improve Excel functionality and your productivity.

13 The Best Kept Secrets of Windows 10

Most Windows 10 users continue to use the Windows operating system as they did in prior versions of Windows, ignoring many new productivity and security features. In this session, you will learn the best kept secrets of Windows 10, including how you can use it to minimize the threat of ransomware, integrate with your mobile device, and track your activities. Join us in this session so that you can take full advantage of Windows 10.

» 11:30 a.m. LUNCH

» 12:20 p.m.

AFTERNOON BREAKOUT SESSIONS

14 Technology Decision Tree – Medium to Large Business Accounting

What to do? Although Microsoft and Sage still dominate mid-market accounting, Acumatica, Intacct, and others provide formidable Cloud-based solutions, while Open Systems, SYSPRO, SAP, Oracle, Epicor, Infor, and others offer a variety of intriguing options. How can we select and implement the right system? This session is designed to present a series of questions and answers to help you determine the approach that works for you. Major benefits and drawbacks of each product are included.

15 Microsoft Power BI – Power Reporting for Free!

Microsoft’s Power BI Desktop puts business intelligence in your hands! Offered as a free tool, Power BI allows you to create compelling reports in mere minutes. Participate in this session to embark upon a guided tour of linking data into Power BI, creating stunning and powerful visualizations, and building interactive reports, all with the free version of Power BI. Additionally, you will learn how you can extend these capabilities with a Power BI Pro subscription.

16 Filtering the World – Spam, Virus, and Malware Protection

Bad actors want inside your systems and want to steal your data. They can attack your systems directly or they can use your email inbox to facilitate their attacks. In this session, you will learn about various protection options for spam, viruses, and malware. Top tools and techniques will be discussed with multiple solutions discussed in each area.

» 1:20 p.m.

AFTERNOON BREAKOUT SESSIONS

17 Blockchain and Cryptocurrencies

Blockchain and cryptocurrencies such as Bitcoin and Ethereum are two of the hottest technology topics today. Yet few business professionals understand these technologies, their capabilities, their risks, and their potential impacts on business operations and processes, such as contract execution, recording and maintaining real estate ownership records, and supply chains. To learn more about these disruptive technologies – including potential effects on the accounting profession – make plans to participate in this fast-paced and highly informative session.

18 What to Ask Your Technology Provider

Managing Information Technology (IT) is difficult when team members, contractors, and others all sound alike. If you manage IT, wouldn’t it be nice to know the questions that you should be asking? Join us in this session to learn the questions to ask your technology providers and to identify warning flags for suspicious responses. All aspects of IT are included, and the session materials can serve as a checklist for your discussions with your providers.

19 Ransomware – Reducing Your Risks

Ransomware represents one of today’s biggest security threats. Yet few are taking the steps necessary to reduce the risk associated with ransomware, including the potential loss of data and the risk of an attack being considered a security breach. In this session, you will learn how you can implement an effective system of control to mitigate the risk that you will become yet another victim of ransomware.

» 2:10 p.m. BREAK

» 2:20 p.m. GENERAL SESSION

» Tales of True Tech Crimes – Ripped from the Headlines

Security is a top concern for CPAs every year, yet many hacks result from organizations failing to implement effective information technology controls. In this session, you will learn about critical controls by using case studies from recent security incidents. This strategy helps you understand risks and appropriate responses. Learn how to reduce your risk associated with unauthorized access, theft of information, identity theft, data exfiltration, tax refund fraud, and more.

» Technology has forever changed the business world.

» Do you have the knowledge you need to move forward?

» Are you as effective as you can be within your organization or for your clients?

» Can you remain competitive?

LEARNING OBJECTIVES

After participating in these series of sessions you should be able to:

- » Determine how to utilize existing and future technologies to address the needs of your organization
- » Describe trends in hardware and software in order to make more informed decisions for your business and your clients
- » Develop and implement strategies for Windows 10, mobility and information security
- » Utilize Microsoft Office’s most powerful features