

Agenda

Day 1 Sessions

» 7:30 a.m. REGISTRATION

» 8:00 a.m. GENERAL SESSION

» Tech Update

In this session, you will learn about spending trends, software licensing issues, leading-edge hardware, mobile and cloud strategies, and security risks. If you attend only one technology session this year, make sure it is this one so that you are well-positioned for what lies ahead!

» 9:40 a.m. BREAK

» 9:50 a.m.

MORNING BREAKOUT SESSIONS

2 CPA Firm Technologies

Join us in this session - designed specifically for public practice professionals - to gain real-world, practical perspectives on the opportunities available today. Learn about specific actions you can take to capitalize on new tools and better techniques in all areas of practice, from tax to audit to client accounting services.

3 Bringing Artificial Intelligence to Your Excel Workbooks

If you are an Office 365 subscriber, you should know that Microsoft is bringing artificial intelligence to your Excel workbooks. These leading-edge features include Ideas, new data types, the ability to insert data from a picture, and dynamic arrays. If you know how to use these tools, these AI-powered additions to Excel will save you time and improve accuracy.

4 Everything Google

You are already familiar with Google's search service and Gmail. Attend this session, to learn about Google's most useful features, apps, and services, all of which financial professionals could use better. Further, learn how to find better web results, gain an understanding of G Suite, and how to use it as your organization's back office, including time-saving tips to use these features more effectively and efficiently.

» 11:30 a.m. LUNCH

» 12:30 p.m.

AFTERNOON BREAKOUT SESSIONS

5 Blockchain and Emerging Technologies

Blockchain and other emerging technologies will affect every industry and profession. In this "how-to" session, you will learn about those that directly affect business professionals. While many emerging technologies are not yet ready for prime-time, some of them are. With the cookbook approach used in this session, you will see how tools, available now, can help you and your team be more productive, efficient, and effective.

6 PDF Tools for Productivity

Stop struggling with PDFs! Adobe Acrobat provides access to many features which make working with PDFs a breeze. Learn how you can use these features for improved efficiency and data security. More specifically, learn about PDF forms, redaction, converting PDFs to Word and Excel files, electronic signatures, creating and applying tick marks, and securing PDF documents.

7 Small Business Cloud Accounting Shootout

With so many Cloud-based accounting solutions available today, it can be difficult to know which one is best for you and your clients. In this session, you will learn about the relative strengths, right fits, and target markets for many of the leading cloud-based solutions currently available, including QuickBooks Online, Sage Business Cloud Accounting, Xero, and Accounting Suite. You will also learn about some of the lesser-known but practical options such as Zoho and Wave Accounting.

» 2:10 p.m. BREAK

» 2:20 p.m. GENERAL SESSION

Personal Privacy

With much of our personal information collected and stored by others - what can we do to help protect our privacy? Personal privacy is one of the biggest concerns of many individuals and organizations. By taking part in this session, you will learn valuable techniques that can help you identify what elements of your personal information are at risk. Perhaps more importantly, you will learn what you can do to get back in control.

Day 2 Sessions

» 7:30 a.m. REGISTRATION

» 8:00 a.m. GENERAL SESSION

» The Best of the Best - Office Productivity Boosters

Most professionals are familiar with using the Microsoft Office suite for day to day productivity. But how much more could you do to improve your productivity? Are you using Office's best tricks? In this session, you will learn how to spot opportunities where you can achieve productivity gains with little effort. Moreover, you will learn how to use the tools you already own to boost your office productivity.

» 9:40 a.m. BREAK

» 9:50 a.m.

MORNING BREAKOUT SESSIONS

11 Going Virtual

"Going virtual" has evolved beyond anywhere, anytime, any device access to full-service remote support. There are a wide variety of tools that help us work virtually. In this session, you will learn about many of them, including multi-factor authentication, hosting, VOIP telephony, video conferencing, document management systems, portals, Microsoft Bookings/Teams/TimeTrade, and employee portals.

12 A Scary Ride Through the Dark Web

You have heard of the Dark Web, but have you experienced it? If not, buckle up for a scary ride through the underbelly of the Internet. Here many illicit and illegal activities occur every day, potentially affecting our personal and organizational security. Upon completing this session, you will understand why it is important to secure your information so that you do not become yet another victim of the Dark Web.

13 Excel Power Query

Microsoft has updated Excel's Power Query tool - first released in 2010 - with many new features. Power Query now provides users with the ability to access, link, and clean data to prepare it for reporting. Learn ten things every Power Query user should know to make it easier to create powerful reports in less time from any data source.

» 11:30 a.m. LUNCH

» 12:20 p.m.

AFTERNOON BREAKOUT SESSIONS

14 Personal Technologies

No doubt, personal technologies are now mainstream. But can we automate our homes - and businesses - for convenience and security? What about connecting smart speakers, like Amazon Alexa or Google Home units, into our lighting systems or our surround sound TV systems? Learn the options available to tie various systems together and the fundamentals of using integration tools like, "If This, Then That (IFTTT)," to handle the task. Tune up your world at home and office with a little bit of effort.

15 Improving Communications

Charts and graphs are nothing new. However, many professionals struggle with building effective visualizations. Take part in this session to improve your skills when building visualizations. Learn how to create advanced charts that are interactive, dynamic, and animated. If you are looking to improve your communication skills, this session is a must for you.

16 Power BI - Advanced Reporting

In this session, you will learn how to go beyond importing data into Power BI and creating simple reports. Instead, you will learn how to take advantage of some of Power BI's advanced features, including managing data relationships, creating KPIs, adding goal-oriented graphics, filtering with Slicers, and using new AI features in Power BI. Further, you will learn how you can use Power BI Desktop, Power BI Mobile, and Power BI Pro in concert to create a comprehensive reporting strategy.

» 1:10 p.m. BREAK

» 1:20 p.m.

AFTERNOON BREAKOUT SESSIONS

17 Mid-Market Accounting, ERP, and Business Intelligence

Is your accounting platform performing as expected? Sophisticated features formerly only available in Tier 1 ERP solutions have moved down market into the mid-market. Further, add-ons like business intelligence, financial reporting, budgeting, accounts payable automation, and sales tax compliance are easy to integrate to create a complete solution. If you have outgrown your existing system, have a proprietary system in place, or have a system that is ten years old or greater, it is time for you to review your options.

18 Current Tech Crimes

Security is a top concern for CPAs every year. Yet many hacks result from organizations not implementing effective internal controls over information technology. In this session, you will learn about critical IT-related controls using a case study approach. More specifically, you will learn from real-world examples of breaches and security failures. Attend this fast-paced session and learn more about IT-related controls you can use to prevent computer crimes such as identity and information theft, tax refund fraud, and more.

19 Sales Tax Compliance in a Post-Wayfair World

The Supreme Court's Wayfair decision changes the game with respect to sales tax compliance. Now, many states are rushing to implement laws requiring even small businesses to charge, collect, and remit sales taxes on transactions that cross state lines. As a result, sales tax compliance just became infinitely more complex and many businesses could be looking at substantial fines and penalties for not complying. In this session, you will learn about your new compliance requirements and about tools that you can use to meet these requirements.

» 2:10 p.m. BREAK

» 2:20 p.m. GENERAL SESSION

» Excel's Best New Features

With the release of Excel 2019 and updates in Excel provided through Office 365 subscriptions, Microsoft continues to pack new features into the popular spreadsheet tool. Enhancements to Power Query, new functions, and improved collaboration opportunities are all available in newer versions of Excel. Exciting opportunities for improved productivity await. Learn how you can put Excel's best new features to work right away!

» 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