

Technology for Accounting

Taxation

Construction

BVLS

Leadership & Growth

Accounting & Assurance

	8 – 9:15 a.m. Keynote	9:30 – 10:20 a.m. Concurrent 1	10:35 – 11:25 a.m. Concurrent 2	12:25 – 1:15 p.m. Concurrent 3	1:30 – 2:20 p.m. Concurrent 4	2:35 – 3:25 p.m. Concurrent 5	3:45 – 5 p.m. Keynote
<b>Brittlebush</b>		<b>Workshop:</b> <b>Consciously Navigating Conflict (SK)</b> <i>Sarah Elliott, Intend2Lead</i>			<b>Cybersecurity for Tax Professionals (IT)</b> <i>Kenny Kang, Kenny Kang CPA</i>	<b>Project Safety: Bringing it to the Bottom Line (SK)</b> <i>David James &amp; Steve Walker</i>	
<b>Cottonwood</b>	<b>Portrait of the Future CPA Firm – A Radical Approach</b> <i>Jody Padar, April</i>	<b>Construction Tax Planning (TAX)</b> <i>Glenn Conover, Conover Asay CPAs &amp; Brandon Temple, CBIZ</i>	<b>Understanding, Detecting and Dealing with the Commercial Fraud (A&amp;A)</b> <i>Jon Titus, Titus Brueckner &amp; Levine</i>	<b>Hot Topics in Risk Management (A&amp;A)</b> <i>Dennis Tsonis, Lovitt &amp; Touche</i>	<b>10 Things to Consider In Your Year-End Tax Planning (TAX)</b> <i>Yesenia Barraza Simmons, YB Company</i>	<b>AZ Voluntary Passthrough Entity Tax (TAX)</b> <i>Ed Zollars, Thomas, Zollars &amp; Lynch, Ltd.</i>	<b>Coaching as a Leadership Style</b> <i>Karyn Edwards, Abloom Coaching</i>
<b>Ocotillo</b>	Break • 9:15 – 9:30 a.m.	<b>Tax Reporting for Digital Assets (TAX)</b> <i>Mark Kohler, Directed IRA</i>	Break • 10:20 – 10:35 a.m.	Break • 11:25 a.m. – 12:25 p.m.	<b>Pitch Perfect: Writing for Publication (SK)</b> <i>Tim Eigo, State Bar of Arizona Haley MacDonell, ASCPA</i>	Break • 2:20 – 2:35 p.m.	Break • 3:25 – 3:45 p.m.
<b>Chia</b>		<b>I want the TRUTH: Preparing to be an Expert Witness (SK)</b> <i>David Cotton, Cotton (A Sikich Company)</i>			<b>Preparing Effective Business Appraisal &amp; Economic Damages Rebuttal Reports</b> <i>James Anderson &amp; Donald Bays</i>		
		<b>Performance Auditing Made Easy (A&amp;A)</b> <i>David Cotton, Cotton (A Sikich Company)</i>		<b>Tax Wise Philanthropy (TAX)</b> <i>Lisa Stratton &amp; Amber Ramirez, Arizona Community Foundation</i>	<b>Compliance with DOL &amp; ICE (A&amp;A)</b> <i>Julie Pace, Messner ReevesLLP</i>	<b>Cryptocurrency Tax Policy (TAX)</b> <i>Seth Wilks, TaxBit (Remote Speaker)</i>	
						<b>BV or Not BV? Now THAT is a Question (SK)</b> <i>Kevin Yeanoplos, Brueggman and Johnson Yeanoplos, P.C.</i>	

## **NOVEMBER 8 – DAY ONE**

### **8:05 – 9:15 a.m. | Portrait of the Future CPA Firm—A Radical Approach**

Jody Padar, CPA (in IL), MST, *April*

The accounting industry is one of the few spaces that has successfully withstood the test of time, heavily built on long-term client relationships, deep trust and traditional customer service. For years, CPA firms were largely untouched by some of the technological overhauls seen in other areas of business. But the evolution of new technology and new operational practices is starting to change the way accounting firms are managed. So, how do you launch your own evolution? During this presentation, we'll be discussing the portrait of the future CPA firm, what this means for the firm dynamic, and how to prepare for the future, without negatively disrupting your business leveraging the Radical approach.

After completing this course, you will be able to:

- Prepare for the future, using the “radical” methodology
- Anticipate and maneuver around the business disruption
- Ask the right questions when considering new technology changes in the firm

### **9:15 – 9:30 a.m. | Networking Break**

### **9:30 – 10:20 a.m. | Breakout #1**

#### **A. Workshop: Consciously Navigating Conflict**

Sarah Elliot, CPA (in TX), PCC, *Intend2Lead*

Conflict can feel messy, awkward and scary at times...so much so, that you may find yourself trying to avoid it altogether!

When we choose to consciously navigate conflict, instead of avoiding it, we gain a valuable opportunity to expand our perspectives and can ultimately come to better solutions together. During this hands-on, interactive workshop, you'll get to work on a real-life, current conflict you're facing. Sarah will help you apply a simple, three-step framework to consciously navigate the conflict. Plus, she'll provide some real-time coaching, so you can walk away with more confidence and curiosity around conflict!

#### **B. Tax Reporting for Digital Assets**

Mark J. Kohler, CPA, JD, *Kyler, Kohler, Ostermiller & Sorensen, LLP*

The IRS has established rules around the sale, exchange and use of virtual currencies to pay for goods and services or using them as an investment. Join author and YouTuber, Mark Kohler, as he discusses tax reporting strategies for your tax client's digital assets.

#### **C. I want the TRUTH: Preparing to be an Expert Witness**

David L. Cotton, CPA (in VA), CFE, CGMA, *Cotton (A Sikich Company)*

Many practitioners are asked to help parties in litigation resolve disputes or serve as experts in a court of law. This session will serve as a guide when it happens to you. Things you need to know:

- Engagement acceptance considerations
- What standards should be followed
- Preparing to testify, what to expect
- Traps and tricks designed to undermine your effectiveness

Many CPAs are reluctant to enter the adversarial arena. But triers of fact need our expertise and help in understanding complex financial management and accounting issues so that justice is served. Litigation support work is always challenging and can be extremely rewarding and satisfying if you are properly prepared.

#### **D. Construction Tax Planning**

Glenn C. Conover, CPA, CCIFP, *Conover Asay CPAs, PLLC*

Brandon W. Temple, CPA, MTAX, *CBIZ & MHM*

What is tax planning and how is it best achieved? Tax avoidance is legal while tax evasion is illegal. Join us as we explore the theory of tax planning and discuss deferral vs conversion methods for businesses and individuals.

### **10:20 – 10:35 a.m. | Networking Break**

### **10:35 – 11:25 a.m. | Breakout #2**

#### **A. Workshop: Consciously Navigating Conflict**

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#### **B. Performance Auditing Made Easy**

David L. Cotton, CPA (in VA), CFE, CGMA, *Cotton (A Sikich Company)*

Unlike a traditional financial audit objective (Are the financial statements materially misstated?), performance auditing can address a wide variety of objectives (Is this program working? Can it be improved? Where can we save money? How can we operate more efficiently and effectively?). This session will explain what a performance audit is, describe the standards that must be followed and provide examples that indicate the value of a performance audit. Performance audits can add value to any entity and practitioners can profit from adding these assurance services to their practices.

#### **C. Understanding, Detecting and Dealing with the Many Types of Commercial Fraud**

Jon A. Titus, *Titus, Brueckner & Levine PLC*

Learn about the many types of fraud prevalent today and what to do when you detect red flags that your client may be the victim of a fraudster.

**D. A Panel of Financial Statement Users: What Contractors Need to Know**

Adam White, *Bell Bank*

Thomas A Lawless, CPA, *Sunland Asphalt*

Ryan Spriggs, AFSB, CCIFP, *EMC insurance Companies*

Banks and Sureties require regular or annual GAAP financial statements for many reasons. In addition to comparisons to peers, construction contractors should become intimately familiar with best practices, avoid red flags and deepen relationships with the financial statement users. This panel will provide valuable insight into the characteristics of a successful and healthy contractor and offer suggestions for becoming bondable and increasing bondability and credit.

1. Become informed of the metrics, potential red flags and characteristics of a healthy contractor.
2. Receive a blueprint to become bondable or increase bondability.
3. Better understand the best practices of indirect cost allocations and G&A absorption.

**11:25 a.m. – 12:25 p.m. | Lunch**

**12:25 – 1:15 p.m. | Breakout #3**

**A. Workshop: Consciously Navigating Conflict**

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**B. Tax Wise Philanthropy**

Amber Ramirez, *Arizona Community Foundation*

Lisa Stratton, *Arizona Community Foundation*

Join the Arizona Community Foundation to learn about various giving vehicles your clients can use to achieve both their philanthropic and tax planning goals, such as Charitable Lead & Remainder Trusts, Charitable Gift Annuities, and other complex gifts. Learn how you can support clients in their succession and estate planning with charitable options. And finally, learn through situational analysis of case studies highlighting tax and philanthropic objectives.

**C. Tips for Preparing Effective Business Appraisal and Economic Damages Rebuttal Reports**

James R. Anderson, CPA, ABV, CFF, ASA, *James R. Anderson, CPA, P.C.*

Donald Ray Bays, CPA, ABV, CVA, CFF, *J.S. Held LLC*

Learn how to create persuasive rebuttal reports in business valuation and economic damages cases from experienced testifying professionals. Find out what pitfalls to avoid. Litigation support services professionals new and experienced will benefit from tips from these experts.

**D. Hot Topics in Risk Management**

Dennis Tsonis, CPCU, *Lovitt & Touche, A Marsh & McLennan Agency*

Learn how to navigate some of the most pressing Risk Management issues facing Construction Companies today. This will include Cyber Liability, Fleet Management and Cannabis in the workplace.

**1:15 – 1:30 p.m. | Break**

**1:30 – 2:20 p.m. | Breakout #4**

**A. Pitch Perfect: Writing for Publication**

Haley McDonell, *Arizona Society of CPAs*

Tim Eigo, M.A., J.D., *State Bar of Arizona*

Learn how to navigate some of the most pressing Risk Management issues facing Construction Companies today. This will include Cyber Liability, Fleet Management and Cannabis in the workplace.

**B. Compliance with DOL & ICE**

Julie Pace, *Messner Reeves, LLP*

Learn Tips and issue spotting regarding wage and hour audits, I-9 audits, and NLRB claims; understand DOL wage and hour requirements and audits and how to conduct an internal wage and hour audit and the understand the top 10 employment mistakes. Learn to conduct your own internal I-9 and E-Verify audit and identify risk management issues.

**C. Cybersecurity for Tax Professionals**

Kenny Kang, M.S., CPA (in CA), CGMA, CFE, *Kenny Kang CPA*

During this session, you will learn about the current cyber threat landscape, including a survey of several cybersecurity reports. We will also review the requirements of cybersecurity for tax professionals as prescribed by Form W-12. To put these concepts together, we will have an in-depth study of various cyber fraud schemes. We will reflect on the importance of having a good cybersecurity posture within your organization by applying a real case study. We will end our discussion with some of the best practices to fight against cyber threats that your organization can put into action immediately.

**D. 10 Things to Consider in Your Year-End Tax Planning**

Yesenia Barraza Simmons, CPA, MTax, *YB Company, LLC*

Let's be proactive and make tax season less overwhelming. Come review the key items to prioritize with your clients during your year-end meetings or calls. Communicating these

changes would help your clients feel at ease and help them gather what they need to make it easier for you to prepare their returns.

**2:20 – 2:35 p.m. | Break**

**2:35 – 3:25 p.m. | Breakout #5**

**A. Project Safety; Bringing it to the Bottom Line**

David L James, CPA (Retired), CCIFP

Steve Walker, *SSC Underground*

This session will address the critical elements of safety integration into our companies; why we need to build safe; when and how to grow our safety programs; addressing both the physical and mental elements of safety programs that keep workers returning to our job sites READY to do the job - SAFELY. And how these concepts improve the company bottom line.

**B. BV or not BV? Now THAT is a Question**

Kevin R. Yeanoplos, CPA/ABV, ASA, *Brueggman and Johnson Yeanoplos, P.C.*

To some professionals, business valuation seems as mysterious as nuclear fusion. It may not be as earth-changing, but, like fusion, knowing just enough to be dangerous can blow up in your face. This session will cover the fundamental concepts of business valuation and common mistakes... and make the world safe again.

**C. Cryptocurrency Tax Policy**

Seth C. Wilks, CPA, *TaxBit (REMOTE)*

Attendees will walk away with a better understanding of the following:

- Cryptocurrency tax issues for individuals
- How the IRS audits cryptocurrency
- Cryptocurrency Tax Policy – What are the policymakers and regulators thinking?

**D. AZ Voluntary Passthrough Entity Tax**

Edward K Zollars, CPA, *Thomas, Zollars & Lynch, Ltd.*

Arizona's version of a Notice 2020-75 qualified passthrough entity tax will be first effective for 2022 tax years. Passthrough entities and their partners/shareholders will need to decide on whether or not to elect to be part of this program. The session will look at how such taxes work to reduce the tax burden on taxpayers, problems that arise under current IRS guidance and Arizona's law, the math of determining the benefit, if any, to a partner/shareholder from electing to participate and issues created by Arizona's credit not being refundable, unlike most other states' equivalent program.

**3:25 – 3:45 p.m. | Break**

**3:45 – 5:00 p.m. | Coaching as a Leadership Style**

Karyn Edwards, PhD, ACC, *Abloom Coaching*

Telling and giving advice is easy. As a leader and/or business owner, balancing the instinct to immediately give direction and instead inquire and ask thoughtful questions to gather more information and help the others arrive at their own solution is a skill you can hone. Why? It builds connection and growth in all kinds of relationships. You will learn about the science that supports these practical skills.

Technology for Accounting

Financial Planning

Taxation

Corporate Finance

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<b>Brittlebush</b>		<b>IT Systems Risk Assessment (A&amp;A)</b> <i>William Marshall, Wells Fargo</i>	<b>Case Studies in Cybersecurity Incident Response (IT)</b> <i>Randall Romes, CLA (CliftonLarsonAllen, LLP)</i>	<b>Practice Management Software for Tax Practitioners (TAX)</b> <i>Caron Mitchell &amp; Yesenia Barraza Simmons</i>			
<b>Cottonwood</b>	<b>Economic Update</b> <i>Jim Rounds, Rounds Consulting Group Inc.</i>	<b>Five Income Tax Must-Knows for Real Estate Owners (TAX)</b> <i>Ashley Sullivan, MS Consultants</i>	<b>Hot Topics in Financial Planning (SK)</b> <i>Melissa Kemp, Premium Administration, LLC</i>	<b>Accounting Update for Private Business (A&amp;A)</b> <i>Dana Cretu &amp; John Barbagallo, KPMG LLP</i>	<b>Taxes in Retirement (TAX)</b> <i>Brent Burgesser, Burgesser Wealth Management</i>	<b>Federal Tax Update (TAX)</b> <i>Ed Zollars, Thomas, Zollars &amp; Lynch, Ltd.</i>	<b>Failing to Success</b> <i>Failing to Success Ryan J. Weissmueller, Fintrepid Solutions</i>
<b>Ocotillo</b>		<b>SEC Update (A&amp;A)</b> <i>Dana Cretu &amp; John Barbagallo, KPMG LLP</i>	<b>Complexities Complying with State &amp; Local Sales Tax Laws (TAX)</b> <i>James Ortiz, REDW</i>	<b>Tax-Sensitive Asset Allocation (TAX)</b> <i>David Kimball Walser, Fortitude Family Office</i>	<b>Coping with Uncertainty: Diving into Corporate Agility (SK)</b> <i>Panel Discussion</i>		
<b>Chia</b>		<b>Employer Built Benefits (SK)</b> <i>Stephanie Waldrop, Employee Benefits International (EBI)</i>	<b>Pay Equity in a Tight Labor Market (SK)</b> <i>Saswati Sen, Equity Methods</i>	<b>Using Data to Drive Results (SK)</b> <i>Dave Newman &amp; David Lewerke, Insight Enterprises</i>	<b>Once-in-a-Lifetime Business Exit (SK)</b> <i>Armando Roman, AXIOM Founders Family Office, Inc.</i>		

Break • 9:15 – 9:30 a.m.

Break • 10:20 – 10:35 a.m.

Break • 11:25 a.m. – 12:25 p.m.

Break • 1:15 – 1:30 p.m.

Break • 2:20 – 2:35 p.m.

Break • 3:50 – 4:10 p.m.

## **NOVEMBER 9 – DAY TWO**

### **8:05 – 9:15 a.m. | Economic Update**

Jim Rounds, *Rounds Consulting, LLC*

Current economic conditions will be reviewed with emphasis on the risk of recession, how public policy will impact the economy and what your economic future might look like.

### **9:15 – 9:30 a.m. | Networking Break**

### **9:30 – 10:20 a.m. | Breakout #1**

#### **E. Employer Built Benefits**

Stephanie Waldrop, *Employee Benefits International (EBI)*

Learn how employers can take control and have an active management approach to your health care spending with as few as 25 employees. At the end of this session, you will know how to crawl, walk or run your way to better benefits for your employees at a lower cost for your company's P&L.

#### **F. SEC Update**

Dana Cretu, CPA, *KPMG LLP*

John Barbagallo, CPA (In NY), *KPMG LLP*

KPMG professionals will discuss the organization and structure of the Commission, the implications of rules and guidance recently issued by the SEC, and the impact of disclosure trends on year-end filings.

#### **G. IT Systems Risk Assessment**

William R. Marshall, CPA, CITP, CGMA, CISA, CRISC, CGEIT, COSO/ERM, *Wells Fargo*

Understanding the risks of an IT system is valuable whether you are a controller, internal auditor, financial statement auditor, SOC auditor or CEO. The risk assessment process formalizes how companies of all sizes assess systems and internal control risks. This course is designed to help you identify the key points of a good risk assessment, the key players, frequency of assessment and more.

You will learn the important value of IT risk management and how to perform a risk assessment. At the end of this session, you will be able to complete an IT risk assessment to help protect your organization's ability to perform its mission.

#### **H. Income Tax for Real Estate Owners 2022**

Ashley Sullivan, CCSP, *MS Consultants, LLC*

We will begin with an overview of any relevant tax code changes pertaining to real estate clients changing 1/1/2023. We will then dive into opportunity areas for real estate clients, including but not limited to 1031 exchanges, expensing opportunities and tangible property regulations 2022 and beyond.

## 10:20 – 10:35 a.m. | Networking Break

## 10:35 – 11:25 a.m. | Breakout #2

### A. Pay Equity in a Tight Labor Market

Saswati Sen, *Equity Methods*

This session will help you to achieve a baseline understanding of some of the key human capital challenges that companies face in a tight labor market. We will explore how hiring practices in a tight labor market can impact pay equity and discuss factors other than hiring which could affect pay equity in a tight and unusual labor market, as well as potential strategies that could help solve these layered issues.

### B. Hot Topics in Financial Planning

Melissa Kemp, CFP, AEP, CAP, CNAP, *Premium Administration, LLC*

What advocacy and legislative issues are on the immediate horizon for financial planners and CPAs who extend their tax practice into more comprehensive financial planning?

Review anticipated federal emphasis and actions regarding consumer protection (vulnerable adult and veteran focal points), DOL activity relevant to retirement plan rules for rollovers, and the continuing debate over fiduciary and best interest standards for financial professionals.

At the state level, we'll take a look at local regulators' focus points for professional financial planning and wealth management firm compliance audits, DIFI conversations around insurance and annuity policy sales disclosures, NASAA suggested additional requirements for continuing education for financial professionals, and an environment increasing your responsibility for risk management around cyber security and client privacy protection. The session concludes with information relevant to proactive public policy emphasis for the Financial Planning Association, including a new focus on Title Protection.

### C. Case Studies in Cybersecurity Incident Response – Lessons Learned the Hard Way

Randall J. Romes, CISSP, CRISC, CISA, MCP, PCI-QSA, *CLA (CliftonLarsonAllen, LLP)*

Attendees will gain an up-to date-understanding of the current threat landscape through the analysis of the case studies and examples from our penetration testing, incident response and forensic practice. Through examination of the case studies, we will explore strategies to mitigate the risks related to these types of situations and attacks and discuss the elements and structure of Incident Response plans.

Learning Objectives:

- Understand the latest threat developments
- Recognize critical dependencies and risks in outsourced service provider relationships
- Learn where organizations can focus valuable risk mitigation resources
- Develop and refine a framework of knowledge to plan future security efforts

#### **D. Complexities of Complying with State and Local Sales Tax Laws**

James A. Ortiz, *REDW, LLC*

In 2023, every state that has a sales tax will now have an economic nexus law as a result of South Dakota v. Wayfair, Inc. Complying with the different laws and the complexity of taxability is cumbersome and costly. If sales and use tax were not enough, states are not looking to enforce economic nexus for income taxes as well.

**11:25 a.m. – 12:25 p.m. | Lunch**

**12:25 – 1:15 p.m. | Breakout #3**

#### **A. Accounting Update for Private Businesses**

Dana Cretu, CPA, *KPMG LLP*

John Barbagallo, CPA (In NY), *KPMG LLP*

In this session, KPMG professionals will discuss major developments that may affect a private company's accounting and financial reporting both in the current period and near term.

#### **B. Tax-Sensitive Asset Allocation**

David Kimball Walser, CPA, *Fortitude Family Office*

Modern Portfolio Theory (MPT) forms the foundation for the way most financial planning professionals deliver investment planning and advice. Most academic treatments of MPT treat income taxes as an afterthought. At the end of this session, you will better understand how income taxes should influence investment planning for tax-sensitive investors. We will focus on how taxes impact the Efficient Frontier and discuss how to mitigate the impact of taxes on portfolio income.

#### **C. Using Data to Drive Results**

Dave Newman, *Insight Enterprises*

David Lewerke, *Insight Enterprises*

This session will focus on effectively using data (at whatever your skill level) to drive ROI, in traditional and management accounting. Additionally, this session will focus on current industry trends in the data/AI space and delve into specific "big data" use cases.

#### **D. Panel: Tax Practitioner Management Software**

Yesenia Barraza Simmons, CPA, MTax, *YB Company, LLC*

Caron M. Mitchell, CPA, *Caron Mitchell, CPA*

Learn why you should consider using practice management software for your practice. Two tax practitioners will answer your questions about the best options for your practice, best practices for implementation and what to consider when making your choice.

**1:15 – 1:30 p.m. | Break**

**1:30 – 2:20 p.m. | Breakout #4**

#### **A. Once-in-a-Lifetime Business Exit**

Armando Roman, *AXIOM Founders Family Office, Inc.*

For the CPA that serves a business client, you will understand the highpoints of what's required for a successful business exit from the seller's perspective, including key professionals involved, their roles and responsibilities, when to engage them, expected timelines and the CPA's opportunities to maximize the seller's outcome in their once-in-a-lifetime business exit. The Mom and Pop Shop has become worth millions, but the owners have never sold a business before. They don't know what they don't know. You will come away with a basic understanding of the mechanics of a successful business sale done right, from pre-planning to finish.

#### **B. Coping with Uncertainty: Diving into Corporate Agility**

Duncan W. Torrance, CPA, *FrndlyTV*

James Morgado, MBA, *Insight Enterprises*

Adam Izzett, *Fox Restaurant Concepts*

Douglas A. Dunlap, CPA, *Central Arizona Project*

The corporate world has been spun on its head: a global pandemic, the remote work revolution, labor shortages and supply chain issues. How have organizations adapted, and what can we learn from the responsive tactics business have used to cope? Join experts from the IT, restaurant and utility industries as they break down corporate agility during times of change.

#### **C. Taxes in Retirement**

Brent Burgesser, CEO, *Burgesser Wealth Management*

Build a better understanding of tax laws and tax structures and how that relates to investors. You will walk away with an understanding of what marginal tax rates mean, and what they are. Finally, Burgesser will share some strategies that you can utilize today to effectively reduce and address lifetime taxes.

#### **2:20 – 2:35 p.m. | Break**

#### **2:35 – 3:50 p.m. | Federal Tax Update**

Edward K. Zollars, CPA, *Thomas, Zollars & Lynch, Ltd.*

Every year brings new developments in taxes, and 2022 is no exception. In this session we'll discuss what has happened in 2022 in taxes, including any legislation enacted in 2022, regulations and other IRS guidance published and key court cases. Get ready to handle tax issues for the upcoming tax planning and filing season.

#### **3:50 – 4:10 p.m. | Break**

#### **4:10 – 5:00 p.m. | Failing to Success**

Ryan J. Weissmueller, CPA, *Fintrepid Solutions*

Why embracing failure is key to career growth for financial professionals.  
In this presentation you will learn:

- How to reset the paradigm on failure.
- Why building judgment is one of the most critical skills you can develop and coach.
- How to seek opportunities outside your comfort zone (and why you need to).
- How to set course for your growth journey.