

New Orleans, LA - May 18 - 22, 2026

Monday, May 18

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 1 - Mark Seid
7:30-9:10 AM	Cash Flow Confidence: Get it Right Every Time - Jeff Sailor
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 2 - Mark Seid
9:40-11:20 AM	Navigating Revenue Recognition: Key Insights for Accountants - Jeff Sailor
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Individuals: Part 3 - Mark Seid
11:50AM-1:30PM	Accounting Adventures: Navigating Financial Instruments - Jeff Sailor

Tuesday, May 19

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 1 - Mark Seid
7:30-9:10 AM	Accounting for Inventory - Jeff Sailor
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 2 - Mark Seid
9:40-11:20 AM	Estimates, Contingencies, and Going Concerns: Accounting for the Unknown - Jeff Sailor
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Businesses: Part 3 - Mark Seid
11:50AM-1:30PM	The Fraud Battle Plan - Jeff Sailor

Wednesday, May 20

- 7:30-9:10 AM** **LLCs & S Corps - Comparatives Analysis** - Arthur Werner
- 7:30-9:10 AM** **World's Liveliest Accounting Update Pt 1** - Jeff Sailor
- 7:30-9:10 AM** **Microsoft's Power Tools** - Tommy Stephens, K2
- 9:40-11:20 AM** **S Corporations: Tax Compliance, Elections, and Best Practices** - Arthur Werner
- 9:40-11:20 AM** **World's Liveliest Accounting Update Pt 2** - Jeff Sailor
- 9:40-11:20 AM** **The Best Kept Secrets Of Microsoft 365** - Tommy Stephens, K2
- 11:50AM-1:30PM** **Schedule K-1: What is it & What Do I Do with It?** - Arthur Werner
- 11:50AM-1:30PM** **World's Liveliest Accounting Update Pt 3** - Jeff Sailor
- 11:50AM-1:30PM** **Excel 2026 Deep Dive** - Tommy Stephens, K2

Thursday, May 21

- 7:30-9:10 AM** **Protecting Your Assets: The Complete Guide to Domestic Trusts PT 1** - Arthur Werner
- 7:30-9:10 AM** **Simplifying the Complex: GAAP Alternatives for Private Companies** - Jeff Sailor
- 7:30-9:10 AM** **Excel Power Features and Functions** - Tommy Stephens, K2
- 9:40-11:20 AM** **Protecting Your Assets: The Complete Guide to Domestic Trusts PT 2** - Arthur Werner

- 9:40-11:20 AM** **Closely Held, Financially Free: Strategies for Business Owners** - Jeff Sailor
- 9:40-11:20 AM** **Driving Financial Performance With Power BI and AI- Part 1** - Tommy Stephens, K2
- 11:50AM-1:30PM** **Protecting Your Assets: The Complete Guide to Domestic Trusts PT 3** - Arthur Werner
- 11:50AM-1:30PM** **From Theory to Practice: SSARS and Preparation Engagements** - Jeff Sailor
- 11:50AM-1:30PM** **Driving Financial Performance With Power BI and AI - Part 2** - Tommy Stephens, K2

Friday, May 22

- 7:30-9:10 AM** **SECURE Act 2.0 What's in Effect Now and What's Coming in 2026** - Arthur Werner
- 7:30-9:10 AM** **Fraud's Greatest Hits - Volume 2** - Jeff Sailor
- 7:30-9:10 AM** **2026 Technology Essentials for Busy Professionals** - Tommy Stephens, K2
- 9:40-11:20 AM** **Postmortem Estate Planning: Decedent's Estate Issues** - Arthur Werner
- 9:40-11:20 AM** **Data-Driven Leadership: Essential Metrics for Controllers and CFOs** - Jeff Sailor
- 9:40-11:20 AM** **AI Tools And How They Are Changing** - Tommy Stephens, K2
- 11:50AM-1:30PM** **Cutting-Edge Estate & Financial Planning Trends** - Arthur Werner
- 11:50AM-1:30PM** **Crypto, Blockchain, and NFTs: Unlocking the Mysteries** - Jeff Sailor
- 11:50AM-1:30PM** **Technology-Focused Internal Controls to Combat Theft and Fraud** - Tommy Stephens, K2

Orlando, FL - July 6 - 10, 2026

Monday, July 6

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 1 - Mark Seid
7:30-9:10 AM	Update on the Accounting Pipeline and Impacts to the CPA Profession: Part 1 - Josh McGowan
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 2 - Mark Seid
9:40-11:20 AM	Update on the Accounting Pipeline and Impacts to the CPA Profession: Part 2 - Josh McGowan
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Individuals: Part 3 - Mark Seid
11:50AM-1:30PM	Accounting for Cryptocurrency- Josh McGowan

Tuesday, July 7

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 1 - Mark Seid
7:30-9:10 AM	Juggling the Numbers: Financial Reporting and Analysis - Josh McGowan
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 2 - Mark Seid
9:40-11:20 AM	Nonprofit Accounting and Operations: Tackling Top Challenges - Josh McGowan
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Businesses: Part 3- Mark Seid
11:50AM-1:30PM	Private Equity and the Accounting Industry - Josh McGowan

Wednesday, July 8

- 7:30-9:10 AM **LLCs & S Corps - Comparatives Analysis** - Arthur Werner
- 7:30-9:10 AM **World's Liveliest Accounting Update Pt 1** - Jeff Sailor
- 7:30-9:10 AM **Evaluating Whether to Add Personal Financial Services to your Existing Practice** - Tommy Stephens, K2
- 7:30-9:10 AM **Winning the Talent War: Strategies for Recruitment and Retention** - Rocco Lueck
- 9:40-11:20 AM **S Corporations: Tax Compliance, Elections, and Best Practices** - Arthur Werner
- 9:40-11:20 AM **World's Liveliest Accounting Update Pt 2** - Jeff Sailor
- 9:40-11:20 AM **Leading the Firm Forward** - Ed Robinson
- 9:40-11:20 AM **The Future of Finance: The New CFO in the New Economy** - Rocco Lueck
- 11:50AM-1:30PM **Schedule K-1: What is it & What Do I Do with It?** - Arthur Werner
- 11:50AM-1:30PM **World's Liveliest Accounting Update Pt 3** - Jeff Sailor
- 11:50AM-1:30PM **The Power of Form 1040 - Identifying Key Financial Planning Opportunities** - Jeff Rattiner
- 11:50AM-1:30PM **Lifestyle Firm Building** - Yuri Kapilovich, CPA

Thursday, July 9

- 7:30-9:10 AM **Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues Pt 1** - Steve Siegel

7:30-9:10 AM	Simplifying the Complex: GAAP Alternatives for Private Companies - Jeff Sailor
7:30-9:10 AM	The Art of Influence in Accounting - Ed Robinson
7:30-9:10 AM	Microsoft 365 for CPAs: Unlocking Hidden Productivity Tools - John Higgins
9:40-11:20 AM	Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues Pt 2 - Steve Siegel
9:40-11:20 AM	Estimates Contingencies, and Going Concern: Accounting for the Unknown - Jeff Sailor
9:40-11:20 AM	Insurance: The REAL DEAL on How to Be Prepared—What Your AGENT WON'T TELL YOU! - Jeff Rattiner
9:40-11:20 AM	The AI Revolution in 2026: What CPAs Should Know - John Higgins
11:50AM-1:30PM	Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues Pt 3 - Steve Siegel
11:50AM-1:30PM	Business Valuations - Kyle Schaeffer
11:50AM-1:30PM	Leading Through Disagreement - Ed Robinson
11:50AM-1:30PM	Technology Trends for CPAs and CFOs: 2026 Update - John Higgins

Friday, July 10

7:30-9:10 AM	"The LLC vs the S Corporation – Planning Choices and Considerations" - Steve Siegel
7:30-9:10 AM	Accounting Adventures: Navigating Financial Instruments - Jeff Sailor

7:30-9:10 AM	Leading with Vision - Ed Robinson
7:30-9:10 AM	AI 101 pt - John Higgins
9:40-11:20 AM	Capital Gain Planning After OBBBA – Qualified Small Business Stock – Opportunity Zone Funds - Steve Siegel
9:40-11:20 AM	Cash Flow Confidence: Get it Right Every Time - Jeff Sailor
9:40-11:20 AM	Divorce - The Financial Nightmare - Being Smart During the Process - Jeff Rattiner
9:40-11:20 AM	AI 101 Pt 2 - John Higgins
11:50AM-1:30PM	Income Taxation of Trust and Estates - Steve Siegel
11:50AM-1:30PM	The Fraud Battle Plan: Leveraging Internal Controls for Success - Jeff Sailor
11:50AM-1:30PM	Turn Your Firm Into a Weapon - Ed Robinson
11:50AM-1:30PM	AI 101 pt 3 - John Higgins

White Sulfur Springs, WV - August 10-14, 2026

Monday, August 10

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 1 - Alice Orzechowski
7:30-9:10 AM	Estimates, Contingencies, and Going Concerns: Accounting for the Unknown - Jennifer Louis
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 2 - Alice Orzechowski
9:40-11:20 AM	Navigating Revenue Recognition: Key Insights for Accountants - Jennifer Louis
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Individuals: Part 3 - Alice Orzechowski
11:50AM-1:30PM	From Theory to Practice: SSARS and Preparation Engagements - Jennifer Louis

Tuesday, August 11

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 1 - Alice Orzechowski
7:30-9:10 AM	Juggling the Numbers: Financial Reporting and Analysis - Jennifer Louis
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 2 - Alice Orzechowski
9:40-11:20 AM	Cash Flow Confidence: Get it Right Every Time - Jennifer Louis
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Businesses: Part 3 - Alice Orzechowski
11:50AM-1:30PM	Think Like an Auditor: Mastering Financial Statement Preparation - Jennifer Louis

Wednesday, August 12

7:30-9:10 AM	LLCs & S Corps - Comparatives Analysis - Arthur Werner
7:30-9:10 AM	Accounting in Action: The Year's Most Important Updates Pt 1 - Jennifer Louis
7:30-9:10 AM	Evaluating Whether to Add Personal Financial Services to your Existing Practice - Jeff Rattiner
7:30-9:10 AM	Microsoft Power Tools - Tommy Stephens, K2
9:40-11:20 AM	S Corporations: Tax Compliance, Elections, and Best Practices - Arthur Werner
9:40-11:20 AM	Accounting in Action: The Year's Most Important Update Pt 2 - Jennifer Louis
9:40-11:20 AM	Leading the Firm Forward - Ed Robinson
9:40-11:20 AM	Data Analytics - Effective Tools for Better Results - Tommy Stephens, K2
11:50AM-1:30PM	Schedule K-1: What is it & What Do I Do with It? - Arthur Werner
11:50AM-1:30PM	Accounting in Action: The Year's Most Important Update Pt 3 - Jennifer Louis
11:50AM-1:30PM	The Power of Form 1040 - Identifying Key Financial Planning Opportunities - Jeff Rattiner
11:50AM-1:30PM	Technology-Focused Internal Controls to Combat Theft and Fraud - Tommy Stephens, K2

Thursday, August 13

7:30-9:10 AM	Protecting Your Assets: The Complete Guide to Domestic Trusts PT 1 - Arthur Werner
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7:30-9:10 AM	Updating on the Accounting Pipeline and Impacts to the CPA Profession: Part 1 - Josh McGowan
7:30-9:10 AM	The Art of Influence in Accounting - Ed Robinson
7:30-9:10 AM	Technology Trends for CPAs and CFOs 2026 Update - John Higgins
9:40-11:20 AM	Protecting Your Assets: The Complete Guide to Domestic Trusts PT 2 - Arthur Werner
9:40-11:20 AM	Updating on the Accounting Pipeline and Impacts to the CPA Profession: Part 2 - Josh McGowan
9:40-11:20 AM	Insurance: The REAL DEAL on How to Be Prepared—What Your AGENT WON'T TELL YOU! - Jeff Rattiner
9:40-11:20 AM	The AI Revolution in 2026: What CPAs Should Know - John Higgins
11:50AM-1:30PM	Protecting Your Assets: The Complete Guide to Domestic Trusts PT 3 - Arthur Werner
11:50AM-1:30PM	Private Equity and the Accounting Industry - Josh McGowan
11:50AM-1:30PM	Leading Through Disagreement - Ed Robinson
11:50AM-1:30PM	Agentic AI for CPAs: Automate Workflows with Intelligence - John Higgins

Friday, August 14

7:30-9:10 AM	SECURE Act 2.0 What's in Effect Now and What's Coming in 2026 - Arthur Werner
7:30-9:10 AM	2026 Accounting and Auditing Update: Part 1 - Josh McGowan

7:30-9:10 AM	Leading with Vision - Ed Robinson
7:30-9:10 AM	AI 101 pt - John Higgins
9:40-11:20 AM	Postmortem Estate Planning: Decedent's Estate Issues - Arthur Werner
9:40-11:20 AM	2026 Accounting and Auditing Update: Part 2 - Josh McGowan
9:40-11:20 AM	Divorce - The Financial Nightmare - Being Smart During the Process - Jeff Rattiner
9:40-11:20 AM	AI 101 Pt 2 - John Higgins
11:50AM-1:30PM	Cutting-Edge Estate & Financial Planning Trends - Arthur Werner
11:50AM-1:30PM	Accounting for Cryptocurrency and Utilizing AI - Josh McGowan
11:50AM-1:30PM	Turn Your Firm Into a Weapon - Ed Robinson & Jeff Rattiner
11:50AM-1:30PM	AI 101 pt 3 - John Higgins

Las Vegas - October 26-30, 2026

Monday, October 26

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 1 - Mark Seid
7:30-9:10 AM	PCAOB and SEC Update - Jennifer Louis
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 2 - Mark Seid
9:40-11:20 AM	Professional Ethics Considerations for CPAs - Jennifer Louis
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Individuals: Part 3 - Mark Seid
11:50AM-1:30PM	Navigating Revenue Recognition - Jennifer Louis

Tuesday, October 27

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 1 - Mark Seid
7:30-9:10 AM	Accounting and Reporting Long-term Debt - Jennifer Louis
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 2 - Mark Seid
9:40-11:20 AM	Estimates, Contingencies, and Going Concern - Jennifer Louis
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Businesses: Part 3 - Mark Seid
11:50AM-1:30PM	Simplifying the Complex: GAAP Alternative for Private Companies - Jennifer Louis

Wednesday, October 28

- 7:30-9:10 AM** **Social Security and Medicare in 2026** - Steve Siegel
- 7:30-9:10 AM** **Accounting in Action: The Year's Most Important Updates - Part 1** - Jennifer Louis
- 7:30-9:10 AM** **Evaluating Whether to Add Personal Financial Services to your Existing Practice** - Jeff Rattiner
- 7:30-9:10 AM** **Microsoft Power Tools** - Tommy Stephens, K2
- 9:40-11:20 AM** **Planning for the 99%** - Steve Siegel
- 9:40-11:20 AM** **Accounting in Action: The Year's Most Important Updates - Part 2** - Jennifer Louis
- 9:40-11:20 AM** **Leading the Firm Forward** - Ed Robinson
- 9:40-11:20 AM** **Data Analytics - Effective Tools for Better Results** - Tommy Stephens, K2
- 11:50AM-1:30PM** **Understanding the Secure Act** - Steve Siegel
- 11:50AM-1:30PM** **Accounting in Action: The Year's Most Important Updates - Part 3** - Jennifer Louis
- 11:50AM-1:30PM** **The Power of Form 1040 - Identifying Key Financial Planning Opportunities** - Jeff Rattiner
- 11:50AM-1:30PM** **Technology-Focused Internal Controls to Combat Theft and Fraud** - Tommy Stephens, K2

Thursday, October 29

- 7:30-9:10 AM** **Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues Pt 1** - Steve Siegel

7:30-9:10 AM	Audit Power-Up: Maxizing Analytical Procedures for Stronger Evidence - Jennifer Louis
7:30-9:10 AM	The Art of Influence in Accounting - Ed Robinson
7:30-9:10 AM	Excel Power Features and Functions - Tommy Stephens, K2
9:40-11:20 AM	Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues Pt 2 - Jennifer Louis
9:40-11:20 AM	The Fraud Battle Plan - Jennifer Louis
9:40-11:20 AM	Insurance: The REAL DEAL on How to Be Prepared—What Your AGENT WON'T TELL YOU! - Jeff Rattiner
9:40-11:20 AM	Driving Financial Performance With Power BI and AI-Part 1 - Tommy Stephens, K2
11:50AM-1:30PM	Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues Pt 3 - Steve Siegel
11:50AM-1:30PM	Cash Flow Confidence - Jennifer Louis
11:50AM-1:30PM	Leading Through Disagreement - Ed Robinson
11:50AM-1:30PM	Driving Financial Performance With Power BI and AI - Part 2 - Tommy Stephens, K2

Friday, October 30

7:30-9:10 AM	"The LLC vs the S Corporation – Planning Choices and Considerations" - Steve Siegel
7:30-9:10 AM	Juggling the Numbers: Financial Reporting and Analysis - Jennifer Louis

7:30-9:10 AM	Leading with Vision - Ed Robinson
7:30-9:10 AM	2026 Technology Essentials for Busy Professionals - Tommy Stephens, K2
9:40-11:20 AM	Capital Gain Planning After OBBBA – Qualified Small Business Stock – Opportunity Zone Funds - Steve Siegel
9:40-11:20 AM	The Impact of Environmental, Social and Governance (ESG) - Related Matters on Financial Statements and Audits - Jennifer Louis
9:40-11:20 AM	Divorce - The Financial Nightmare - Being Smart During the Process - Jeff Rattiner
9:40-11:20 AM	AI Tools And How They Are Changing - Tommy Stephens, K2
11:50AM-1:30PM	Income Taxation of Trust and Estates - Steve Siegel
11:50AM-1:30PM	Supervisory Skills - Coaching Staff to Stay on the Right Track - Jennifer Louis
11:50AM-1:30PM	Turn Your Firm Into a Weapon - Ed Robinson & Jeff Rattiner
11:50AM-1:30PM	Technology-Focused Internal Controls to Combat Theft and Fraud - Tommy Stephens, K2

Boca Raton - November 2-6, 2026

Monday, November 2

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 1 - Mark Seid
7:30-9:10 AM	Cash Flow Confidence: Get it Right Every Time - Jeff Sailor
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 2 - Mark Seid
9:40-11:20 AM	Navigating Revenue Recognition: Key Insights for Accountants - Jeff Sailor
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Individuals: Part 3 - Mark Seid
11:50AM-1:30PM	Accounting Adventures: Navigating Financial Instruments - Jeff Sailor

Tuesday, November 3

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 1 - Mark Seid
7:30-9:10 AM	Accounting for Inventory - Jeff Sailor
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 2 - Mark Seid
9:40-11:20 AM	Estimates, Contingencies, and Going Concerns: Accounting for the Unknown - Jeff Sailor
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Businesses: Part 3 - Mark Seid
11:50AM-1:30PM	The Fraud Battle Plan - Jeff Sailor

Wednesday, November 4

7:30-9:10 AM	LLCs & S Corps - Comparatives Analysis - Arthur Werner
7:30-9:10 AM	World's Liveliest Accounting Update Pt 1 - Jeff Sailor
7:30-9:10 AM	Evaluating Whether to Add Personal Financial Services to your Existing Practice - Jeff Rattiner
7:30-9:10 AM	Technology Trends for CPAs and CFOs 2026 Update - John Higgins
9:40-11:20 AM	S Corporations: Tax Compliance, Elections, and Best Practices - Arthur Werner
9:40-11:20 AM	World's Liveliest Accounting Update Pt 2 - Jeff Sailor
9:40-11:20 AM	Leading the Firm Forward - Ed Robinson
9:40-11:20 AM	The AI Revolution in 2026: What CPAs Should Know - John Higgins
11:50AM-1:30PM	Schedule K-1: What is it & What Do I Do with It? - Arthur Werner
11:50AM-1:30PM	World's Liveliest Accounting Update Pt 3 - Jeff Sailor
11:50AM-1:30PM	The Power of Form 1040 - Identifying Key Financial Planning Opportunities - Jeff Rattiner
11:50AM-1:30PM	Agentic AI for CPAs: Automate Workflows with Intelligence - John Higgins

Thursday, November 5

7:30-9:10 AM	Protecting Your Assets: The Complete Guide to Domestic Trusts Pt 1 - Arthur Werner
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7:30-9:10 AM	Simplifying the Complex: GAAP Alternatives for Private Companies - Jeff Sailor
7:30-9:10 AM	The Art of Influence in Accounting - Ed Robinson
7:30-9:10 AM	Microsoft 365 for CPAs: Unlocking Hidden Productivity Tools - John Higgins
9:40-11:20 AM	Protecting Your Assets: The Complete Guide to Domestic Trusts Pt 2 - Arthur Werner
9:40-11:20 AM	Closely Held, Financially Free: Strategies for Business Owners - Jeff Sailor
9:40-11:20 AM	Insurance: The REAL DEAL on How to Be Prepared—What Your AGENT WON'T TELL YOU! - Jeff Rattiner
9:40-11:20 AM	Cybersecurity: Protecting Your Firm's Data and Reputation - John Higgins
11:50AM-1:30PM	Protecting Your Assets: The Complete Guide to Domestic Trusts Pt 3 - Arthur Werner
11:50AM-1:30PM	From Theory to Practice: SSARS and Preparation Engagements - Jeff Sailor
11:50AM-1:30PM	Turn Your Firm Into a Weapon - Ed Robinson & Jeff Rattiner
11:50AM-1:30PM	Smarter Tax Services with Artificial Intelligence (AI) Tools - John Higgins

Friday, November 6

7:30-9:10 AM	SECURE Act 2.0 What's in Effect Now and What's Coming in 2026 - Arthur Werner
7:30-9:10 AM	Fraud's Greatest Hits - Volume 2 - Jeff Sailor

7:30-9:10 AM	Lifestyle Firm Building Pt 1 - Yuri Kapilovich, CPA
7:30-9:10 AM	AI 101 Pt 1 - John Higgins
9:40-11:20 AM	Postmortem Estate Planning: Decedent's Estate Issues - Arthur Werner
9:40-11:20 AM	Data-Driven Leadership: Essential Metrics for Controllers and CFOs - Jeff Sailor
9:40-11:20 AM	Lifestyle Firm Building Pt 2 - Yuri Kapilovich, CPA
9:40-11:20 AM	AI 101 Pt 2 - John Higgins
11:50AM-1:30PM	Cutting-Edge Estate & Financial Planning Trends - Arthur Werner
11:50AM-1:30PM	Crypto, Blockchain, and NFTs: Unlocking the Mysteries - Jeff Sailor
11:50AM-1:30PM	Lifestyle Firm Building Pt 3 - Yuri Kapilovich, CPA
11:50AM-1:30PM	AI 101 Pt 3 - John Higgins

Maui, HI - November 9-13, 2026

Monday, November 9

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 1 - Alice Orzechowski
7:30-9:10 AM	Cash Flow Confidence: Get it Right Every Time - Jeff Sailor
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 2 - Alice Orzechowski
9:40-11:20 AM	Navigating Revenue Recognition: Key Insights for Accountants - Jeff Sailor
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Individuals: Part 3 - Alice Orzechowski
11:50AM-1:30PM	Accounting Adventures: Navigating Financial Instruments - Jeff Sailor

Tuesday, November 10

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 1 - Alice Orzechowski
7:30-9:10 AM	Accounting for Inventory - Jeff Sailor
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 2 - Alice Orzechowski
9:40-11:20 AM	Estimates, Contingencies, and Going Concerns: Accounting for the Unknown - Jeff Sailor
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Businesses: Part 3 - Alice Orzechowski
11:50AM-1:30PM	The Fraud Battle Plan - Jeff Sailor

Wednesday, November 11

7:30-9:10 AM	SECURE Act 2.0 & Retirement Planning Updates - Arthur Werner
7:30-9:10 AM	World's Liveliest Accounting Update Pt 1 - Jeff Sailor
7:30-9:10 AM	Evaluating Whether to Add Personal Financial Services to your Existing Practice - Jeff Rattiner
7:30-9:10 AM	Microsoft Power Tools - Tommy Stephens, K2
9:40-11:20 AM	LLCs & S Corps - Comparatives Analysis - Arthur Werner
9:40-11:20 AM	World's Liveliest Accounting Update Pt 2 - Jeff Sailor
9:40-11:20 AM	Leading the Firm Forward - Ed Robinson
9:40-11:20 AM	Data Analytics - Effective Tools for Better Results - Tommy Stephens, K2
11:50AM-1:30PM	S Corporations: Tax Compliance, Elections, and Best Practices - Arthur Werner
11:50AM-1:30PM	World's Liveliest Accounting Update Pt 3 - Jeff Sailor
11:50AM-1:30PM	The Power of Form 1040 - Identifying Key Financial Planning Opportunities - Jeff Rattiner
11:50AM-1:30PM	Technology-Focused Internal Controls to Combat Theft and Fraud - Tommy Stephens, K2

Thursday, November 12

7:30-9:10 AM	Protecting Your Assets: The Complete Guide to Domestic Trusts Pt 1 - Arthur Werner
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7:30-9:10 AM	Simplifying the Complex: GAAP Alternatives for Private Companies - Jeff Sailor
7:30-9:10 AM	The Art of Influence in Accounting - Ed Robinson
7:30-9:10 AM	Excel Power Features and Functions - Tommy Stephens, K2
9:40-11:20 AM	Protecting Your Assets: The Complete Guide to Domestic Trusts Pt 2 - Arthur Werner
9:40-11:20 AM	Closely Held, Financially Free: Strategies for Business Owners - Jeff Sailor
9:40-11:20 AM	Insurance: The REAL DEAL on How to Be Prepared—What Your AGENT WON'T TELL YOU! - Jeff Rattiner
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11:50AM-1:30PM	From Theory to Practice: SSARS and Preparation Engagements - Jeff Sailor
11:50AM-1:30PM	Leading Through Disagreement - Ed Robinson
11:50AM-1:30PM	Driving Financial Performance With Power BI and AI - Part 2 - Tommy Stephens, K2

Friday, November 13

7:30-9:10 AM	SECURE Act 2.0 What's in Effect Now and What's Coming in 2026 - Arthur Werner
7:30-9:10 AM	Fraud's Greatest Hits - Volume 2 - Jeff Sailor

7:30-9:10 AM	Leading with Vision - Ed Robinson
7:30-9:10 AM	2026 Technology Essentials for Busy Professionals - Tommy Stephens, K2
9:40-11:20 AM	Postmortem Estate Planning: Decedent's Estate Issues - Arthur Werner
9:40-11:20 AM	Data-Driven Leadership: Essential Metrics for Controllers and CFOs - Jeff Sailor
9:40-11:20 AM	Divorce - The Financial Nightmare - Being Smart During the Process - Jeff Rattiner
9:40-11:20 AM	AI Tools And How They Are Changing - Tommy Stephens, K2
11:50AM-1:30PM	Cutting-Edge Estate & Financial Planning Trends - Arthur Werner
11:50AM-1:30PM	Crypto, Blockchain, and NFTs: Unlocking the Mysteries - Jeff Sailor
11:50AM-1:30PM	Turn Your Firm Into a Weapon - Ed Robinson & Jeff Rattiner
11:50AM-1:30PM	Technology-Focused Internal Controls to Combat Theft and Fraud - Tommy Stephens, K2

Phoenix, AZ - November 16 - 20, 2026

Monday, November 16

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 1 - Alice Orzechowski
7:30-9:10 AM	Cash Flow Confidence: Get it Right Every Time - Jeff Sailor
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 2 - Alice Orzechowski
9:40-11:20 AM	Navigating Revenue Recognition: Key Insights for Accountants - Jeff Sailor
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Individuals: Part 3 - Alice Orzechowski
11:50AM-1:30PM	Accounting Adventures: Navigating Financial Instruments - Jeff Sailor

Tuesday, November 17

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 1 - Alice Orzechowski
7:30-9:10 AM	Accounting for Inventory - Jeff Sailor
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 2 - Alice Orzechowski
9:40-11:20 AM	Estimates, Contingencies, and Going Concerns: Accounting for the Unknown - Jeff Sailor
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Businesses: Part 3 - Alice Orzechowski
11:50AM-1:30PM	The Fraud Battle Plan - Jeff Sailor

Wednesday, November 18

7:30-9:10 AM	Social Security and Medicare in 2026 - Steve Siegel
7:30-9:10 AM	World's Liveliest Accounting Update Pt 1 - Jeff Sailor
7:30-9:10 AM	Technology Trends for CPAs and CFOs 2026 Update - John Higgins
7:30-9:10 AM	2026 California Federal Tax Update Part 1 - Karen Brosi
9:40-11:20 AM	Planning for the 99% - Steve Siegel
9:40-11:20 AM	World's Liveliest Accounting Update Pt 2 - Jeff Sailor
9:40-11:20 AM	The AI Revolution in 2026: What CPAs Should Know - John Higgins
9:40-11:20 AM	2026 California Federal Tax Update Part 2 - Karen Brosi
11:50AM-1:30PM	Understanding the Secure Act - Steve Siegel
11:50AM-1:30PM	World's Liveliest Accounting Update Pt 3 - Jeff Sailor
11:50AM-1:30PM	Agentic AI for CPAs: Automate Workflows with Intelligence - John Higgins
11:50AM-1:30PM	Turn Your Firm Into a Weapon - Ed Robinson & Jeff Rattiner

Thursday, November 19

7:30-9:10 AM	Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues Pt 1 - Steve Siegel
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7:30-9:10 AM	Simplifying the Complex: GAAP Alternatives for Private Companies - Jeff Sailor
7:30-9:10 AM	The Art of Influence in Accounting - Ed Robinson
7:30-9:10 AM	Microsoft 365 for CPAs: Unlocking Hidden Productivity Tools - John Higgins
9:40-11:20 AM	Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues Pt 2 - Steve Siegel
9:40-11:20 AM	Closely Held, Financially Free: Strategies for Business Owners - Jeff Sailor
9:40-11:20 AM	Insurance: The REAL DEAL on How to Be Prepared—What Your AGENT WON'T TELL YOU! - Jeff Rattiner
9:40-11:20 AM	Cybersecurity: Protecting Your Firm's Data and Reputation - John Higgins
11:50AM-1:30PM	Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues Pt 3 - Steve Siegel
11:50AM-1:30PM	From Theory to Practice: SSARS and Preparation Engagements - Jeff Sailor
11:50AM-1:30PM	Leading Through Disagreement - Ed Robinson
11:50AM-1:30PM	Smarter Tax Services with Artificial Intelligence (AI) Tools - John Higgins

Friday, November 20

7:30-9:10 AM	The LLC vs the S Corporation – Planning Choices and Considerations - Steve Siegel
7:30-9:10 AM	Fraud's Greatest Hits - Volume 2 - Jeff Sailor

7:30-9:10 AM	Leading with Vision - Ed Robinson
7:30-9:10 AM	AI 101 Pt 1 - John Higgins
9:40-11:20 AM	Capital Gain Planning After OBBBA – Qualified Small Business Stock – Opportunity Zone Funds - Steve Siegel
9:40-11:20 AM	Data-Driven Leadership: Essential Metrics for Controllers and CFOs - Jeff Sailor
9:40-11:20 AM	Divorce - The Financial Nightmare - Being Smart During the Process - Jeff Rattiner
9:40-11:20 AM	AI 101 Pt 2 - John Higgins
11:50AM-1:30PM	Income Taxation of Trust and Estates - Steve Siegel
11:50AM-1:30PM	Crypto, Blockchain, and NFTs: Unlocking the Mysteries - Jeff Sailor
11:50AM-1:30PM	Leading the Firm Forward - Ed Robinson
11:50AM-1:30PM	AI 101 Pt 3 - John Higgins

Newport Beach, CA - December 7 - 11

Monday, December 7

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 1 -Jane Ryder
7:30-9:10 AM	PCAOB and SEC Update- Jennifer Louis
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 2- Jane Ryder
9:40-11:20 AM	Professional Ethics Considerations for CPAs - Jennifer Louis
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Individuals: Part 3 -Jane Ryder
11:50AM-1:30PM	Navigating Revenue Recognition -Jennifer Louis

Tuesday, December 8

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 1 -Jane Ryder
7:30-9:10 AM	Accounting and Reporting Long-term Debt - Jennifer Louis
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 2 - Jane Ryder
9:40-11:20 AM	Estimates, Contingencies, and Going Concern- Jennifer Louis
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Businesses: Part 3- Jane Ryder
11:50AM-1:30PM	Simplifying the Complex: GAAP Alternative for Private Companies - Jennifer Louis

Wednesday, December 9

7:30-9:10 AM	LLCs & S Corps - Comparatives Analysis - Arthur Werner
7:30-9:10 AM	Accounting in Action: The Year's Most Important Updates Pt 1 - Jennifer Louis
7:30-9:10 AM	Technology Trends for CPAs and CFOs 2026 Update - John Higgins
7:30-9:10 AM	2026 California Federal Tax Update Part 1 - Jane Ryder
9:40-11:20 AM	S Corporations: Tax Compliance, Elections, and Best Practices - Arthur Werner
9:40-11:20 AM	Accounting in Action: The Year's Most Important Update Pt 2 - Jennifer Louis
9:40-11:20 AM	The AI Revolution in 2026: What CPAs Should Know - John Higgins
9:40-11:20 AM	2026 California Federal Tax Update Part 2 - Jane Ryder
11:50AM-1:30PM	Schedule K-1: What is it & What Do I Do with It? - Arthur Werner
11:50AM-1:30PM	Accounting in Action: The Year's Most Important Update Pt 3 - Jennifer Louis
11:50AM-1:30PM	Agentic AI for CPAs: Automate Workflows with Intelligence - John Higgins
11:50AM-1:30PM	Turn Your Firm Into a Weapon- Ed Robinson & Jeff Rattiner

Thursday, December 10

7:30-9:10 AM	Protecting Your Assets: The Complete Guide to Domestic Trusts PT 1 - Arthur Werner
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7:30-9:10 AM	Audit Power-Up: Maximizing Analytical Procedures for Stronger Evidence - Jennifer Louis
7:30-9:10 AM	The Art of Influence in Accounting - Ed Robinson
7:30-9:10 AM	Microsoft 365 for CPAs: Unlocking Hidden Productivity Tools - John Higgins
9:40-11:20 AM	Protecting Your Assets: The Complete Guide to Domestic Trusts Pt 2 - Arthur Werner
9:40-11:20 AM	The Fraud Battle Plan - Jennifer Louis
9:40-11:20 AM	Insurance: The REAL DEAL on How to Be Prepared—What Your AGENT WON'T TELL YOU! - Jeff Rattiner
9:40-11:20 AM	Cybersecurity: Protecting Your Firm's Data and Reputation - John Higgins
11:50AM-1:30PM	Protecting Your Assets: The Complete Guide to Domestic Trusts Pt 3 - Arthur Werner
11:50AM-1:30PM	Cash Flow Confidence - Jennifer Louis
11:50AM-1:30PM	Leading Through Disagreement - Ed Robinson
11:50AM-1:30PM	Smarter Tax Services with Artificial Intelligence (AI) Tools - John Higgins

Friday, December 11

7:30-9:10 AM	SECURE Act 2.0 What's in Effect Now and What's Coming in 2026 - Arthur Werner
7:30-9:10 AM	Juggling the Numbers: Financial Reporting and Analysis - Jennifer Louis

7:30-9:10 AM	Leading with Vision - Ed Robinson
7:30-9:10 AM	AI 101 Pt 1 - John Higgins
9:40-11:20 AM	Postmortem Estate Planning: Decedent's Estate Issues - Arthur Werner
9:40-11:20 AM	The Impact of Environmental, Social and Governance (ESG) - Related Matters on Financial Statements and Audits - Jennifer Louis
9:40-11:20 AM	Divorce - The Financial Nightmare - Being Smart During the Process - Jeff Rattiner
9:40-11:20 AM	AI 101 Pt 2 - John Higgins
11:50AM-1:30PM	Cutting-Edge Estate & Financial Planning Trends - Arthur Werner
11:50AM-1:30PM	Supervisory Skills - Coaching Staff to Stay on the Right Track- Jennifer Louis
11:50AM-1:30PM	Leading the Firm Forward - Ed Robinson
11:50AM-1:30PM	AI 101 Pt 3 - John Higgins

Las Vegas, NV - December 14 - 18, 2026

Monday, December 14

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 1 - Alice Orzechowski
7:30-9:10 AM	Cash Flow Confidence: Get it Right Every Time - Jeff Sailor
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 2 - Alice Orzechowski
9:40-11:20 AM	Navigating Revenue Recognition: Key Insights for Accountants - Jeff Sailor
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Individuals: Part 3 - Alice Orzechowski
11:50AM-1:30PM	Accounting Adventures: Navigating Financial Instruments - Jeff Sailor

Tuesday, December 15

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 1 - Alice Orzechowski
7:30-9:10 AM	Accounting for Inventory - Jeff Sailor
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 2 - Alice Orzechowski
9:40-11:20 AM	Estimates, Contingencies, and Going Concerns: Accounting for the Unknown - Jeff Sailor
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Businesses: Part 3 - Alice Orzechowski
11:50AM-1:30PM	The Fraud Battle Plan - Jeff Sailor

Wednesday, December 16

7:30-9:10 AM	LLCs & S Corps - Comparatives Analysis - Arthur Werner
7:30-9:10 AM	World's Liveliest Accounting Update Pt 1 - Jeff Sailor
7:30-9:10 AM	Microsoft Power Tools - Tommy Stephens, K2
7:30-9:10 AM	2026 California Federal Tax Update Part 1 - Karen Brosi
9:40-11:20 AM	S Corporations: Tax Compliance, Elections, and Best Practices - Arthur Werner
9:40-11:20 AM	World's Liveliest Accounting Update Pt 2 - Jeff Sailor
9:40-11:20 AM	Data Analytics - Effective Tools for Better Results - Tommy Stephens, K2
9:40-11:20 AM	2026 California Federal Tax Update Part 2 - Karen Brosi
11:50AM-1:30PM	Schedule K-1: What is it & What Do I Do with It? - Arthur Werner
11:50AM-1:30PM	World's Liveliest Accounting Update Pt 3 - Jeff Sailor
11:50AM-1:30PM	Technology-Focused Internal Controls to Combat Theft and Fraud - Tommy Stephens, K2
11:50AM-1:30PM	Turn Your Firm Into a Weapon - Ed Robinson & Jeff Rattiner

Thursday, December 17

7:30-9:10 AM	Protecting Your Assets: The Complete Guide to Domestic Trusts Pt 1 - Arthur Werner
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7:30-9:10 AM	Simplifying the Complex: GAAP Alternatives for Private Companies - Jeff Sailor
7:30-9:10 AM	The Art of Influence in Accounting - Ed Robinson
7:30-9:10 AM	Excel Power Features and Functions - Tommy Stephens, K2
9:40-11:20 AM	Protecting Your Assets: The Complete Guide to Domestic Trusts Pt 2 - Arthur Werner
9:40-11:20 AM	Closely Held, Financially Free: Strategies for Business Owners - Jeff Sailor
9:40-11:20 AM	Insurance: The REAL DEAL on How to Be Prepared—What Your AGENT WON'T TELL YOU! - Jeff Rattiner
9:40-11:20 AM	Driving Financial Performance With Power BI and AI-Part 1 - Tommy Stephens, K2
11:50AM-1:30PM	Protecting Your Assets: The Complete Guide to Domestic Trusts PT 3 - Arthur Werner
11:50AM-1:30PM	From Theory to Practice: SSARS and Preparation Engagements - Jeff Sailor
11:50AM-1:30PM	Leading Through Disagreement - Ed Robinson
11:50AM-1:30PM	Driving Financial Performance With Power BI and AI - Part 2 - Tommy Stephens, K2

Friday, December 18

7:30-9:10 AM	SECURE Act 2.0 What's in Effect Now and What's Coming in 2026 - Arthur Werner
7:30-9:10 AM	Simplifying the Complex: GAAP Alternatives for Private Companies - Jeff Sailor

7:30-9:10 AM	Leading the Firm Forward - Ed Robinson
7:30-9:10 AM	2026 Technology Essentials for Busy Professionals - Tommy Stephens, K2
9:40-11:20 AM	Postmortem Estate Planning: Decedent's Estate Issues - Arthur Werner
9:40-11:20 AM	Closely Held, Financially Free: Strategies for Business Owners - Jeff Sailor
9:40-11:20 AM	Divorce - The Financial Nightmare - Being Smart During the Process - Jeff Rattiner
9:40-11:20 AM	AI Tools And How They Are Changing - Tommy Stephens, K2
11:50AM-1:30PM	Cutting-Edge Estate & Financial Planning Trends - Arthur Werner
11:50AM-1:30PM	From Theory to Practice: SSARS and Preparation Engagements - Jeff Sailor
11:50AM-1:30PM	Leading with Vision- Ed Robinson
11:50AM-1:30PM	Technology-Focused Internal Controls to Combat Theft and Fraud - Tommy Stephens, K2