

# Maui, HI - November 9-13, 2026

## Monday, November 9

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

## Tuesday, November 10

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

## Wednesday, November 11

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

## Thursday, November 12

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

## **Friday, November 13**

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

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