

# Newport Beach, CA - December 7 - 11

## Monday, December 7

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

## Tuesday, December 8

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

## Wednesday, December 9

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

## Thursday, December 10

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

## Friday, December 11

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

<b>7:30-9:10 AM</b>	<b>Leading with Vision - Ed Robinson</b>
<b>7:30-9:10 AM</b>	<b>AI 101 Pt 1 - John Higgins</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>The Impact of Environmental, Social and Governance (ESG) - Related Matters on Financial Statements and Audits - Jennifer Louis</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 101 Pt 2 - John Higgins</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>Supervisory Skills - Coaching Staff to Stay on the Right Track- Jennifer Louis</b>
<b>11:50AM-1:30PM</b>	<b>Leading the Firm Forward - Ed Robinson</b>
<b>11:50AM-1:30PM</b>	<b>AI 101 Pt 3 - John Higgins</b>