

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