

# Orlando, FL - July 6 - 10, 2026

## Monday, July 6

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

## Tuesday, July 7

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7:30-9:10 AM	<b>2026 Tax Update: Critical Issues Impacting Businesses: Part 1</b> - Mark Seid, EA, CPA, USTCP
7:30-9:10 AM	<b>2026 Accounting and Auditing Update</b> - Josh McGowan, DBA, CPA
9:40-11:20 AM	<b>2026 Tax Update: Critical Issues Impacting Businesses: Part 2</b> - Mark Seid, EA, CPA, USTCP
9:40-11:20 AM	<b>2026 Ethical Failures</b> - Josh McGowan, DBA, CPA
11:50AM-1:30PM	<b>2026 Tax Update: Critical Issues Impacting Businesses: Part 3-</b> Mark Seid, EA, CPA, USTCP
11:50AM-1:30PM	<b>Private Equity and the Accounting Industry</b> - Josh McGowan, DBA, CPA

## Wednesday, July 8

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- 7:30-9:10 AM**      **LLCs & S Corporations: Compliance and Tax Issues** - Art Werner, JD, MS
- 7:30-9:10 AM**      **The Remote Work Playbook** - Ed Robinson, CPA, CSP
- 7:30-9:10 AM**      **World's Liveliest Accounting Update: Part 1** - Tommy Stephens, K2
- 7:30-9:10 AM**      **Winning the Talent War: Strategies for Recruitment and Retention** - Rocco Lueck, PhD
- 9:40-11:20 AM**      **S Corporations in Practice: Key Tax Rules and Compliance Issues** - Art Werner, JD, MS
- 9:40-11:20 AM**      **World's Liveliest Accounting Update Pt 2** - Jeff Sailor, CPA
- 9:40-11:20 AM**      **Leading the Firm Forward** - Ed Robinson, CPA, CSP
- 9:40-11:20 AM**      **The Future of Finance: The New CFO in the New Economy** - Rocco Lueck, PhD
- 11:50AM-1:30PM**      **K-1 Reporting in Practice: Basis, Losses, and QBI** - Art Werner, JD, MS
- 11:50AM-1:30PM**      **World's Liveliest Accounting Update Pt 3** - Jeff Sailor, CPA
- 11:50AM-1:30PM**      **401(k) Fiduciary Best Practices** - Rocco Lueck, PhD
- 11:50AM-1:30PM**      **Lifestyle Firm Building** - Yuri Kapilovich, CPA

## Thursday, July 9

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- 7:30-9:10 AM**      **Protecting Your Assets: The Complete Guide to Domestic Trusts: Part 1** - Art Werner, JD, MS

7:30-9:10 AM	<b>Simplifying the Complex: GAAP Alternatives for Private Companies</b> - Jeff Sailor, CPA
7:30-9:10 AM	<b>The Art of Influence in Accounting</b> - Ed Robinson, CPA, CSP
7:30-9:10 AM	<b>Microsoft 365 for CPAs: Unlocking Hidden Productivity Tools</b> - John Higgins, CPA, CITP
9:40-11:20 AM	<b>Protecting Your Assets: The Complete Guide to Domestic Trusts: Part 2</b> - Art Werner, JD, MS
9:40-11:20 AM	<b>Estimates Contingencies, and Going Concern: Accounting for the Unknown</b> - Jeff Sailor, CPA
9:40-11:20 AM	<b>Executive Benefits Planning and Non-Qualified Plans</b> - Rocco Lueck, PhD
9:40-11:20 AM	<b>The AI Revolution in 2026: What CPAs Should Know</b> - John Higgins, CPA, CITP
11:50AM-1:30PM	<b>Protecting Your Assets: The Complete Guide to Domestic Trusts: Part 3</b> - Art Werner, JD, MS
11:50AM-1:30PM	<b>Business Valuations</b> - Kyle Schaeffer, CPA, CFE
11:50AM-1:30PM	<b>Leading Through Disagreement</b> - Ed Robinson, CPA, CSP
11:50AM-1:30PM	<b>Technology Trends for CPAs and CFOs: 2026 Update</b> - John Higgins, CPA, CITP

## Friday, July 10

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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> - Art Werner, JD, MS
7:30-9:10 AM	<b>Accounting Adventures: Navigating Financial Instruments</b> - Jeff Sailor, CPA

<b>7:30-9:10 AM</b>	<b>Leading with Vision</b> - Ed Robinson, CPA, CSP
<b>7:30-9:10 AM</b>	<b>AI 101: Part 1 - Introduction to AI</b> - John Higgins, CPA, CITP
<b>9:40-11:20 AM</b>	<b>Postmortem Estate Planning: Decedent's Estate Issues</b> - Art Werner, JD, MS
<b>9:40-11:20 AM</b>	<b>Cash Flow Confidence: Get it Right Every Time</b> - Jeff Sailor, CPA
<b>9:40-11:20 AM</b>	<b>From Data Insights</b> - Rocco Lueck, PhD
<b>9:40-11:20 AM</b>	<b>AI 101: Part 2 - Microsoft Copilot</b> - John Higgins, CPA, CITP
<b>11:50AM-1:30PM</b>	<b>Cutting-Edge Estate &amp; Financial Planning Trends</b> - Art Werner, JD, MS
<b>11:50AM-1:30PM</b>	<b>The Fraud Battle Plan: Leveraging Internal Controls for Success</b> - Jeff Sailor, CPA
<b>11:50AM-1:30PM</b>	<b>The Power of the People</b> - Ed Robinson, CPA, CSP
<b>11:50AM-1:30PM</b>	<b>AI 101: Part 3 - ChatGPT</b> - John Higgins, CPA, CITP

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

## Monday, August 10

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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>Estimates, Contingencies, and Going Concerns: Accounting for the Unknown</b> - Jennifer Louis |
| 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> - Jennifer Louis             |
| 11:50AM-1:30PM | <b>2026 Tax Update: Critical Issues Impacting Individuals: Part 3</b> - Alice Orzechowski        |
| 11:50AM-1:30PM | <b>From Theory to Practice: SSARS and Preparation Engagements</b> - Jennifer Louis               |

## Tuesday, August 11

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

## Wednesday, August 12

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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>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>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>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>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>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, August 13

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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>Updating on the Accounting Pipeline and Impacts to the CPA Profession: Part 1 - Josh McGowan</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>Technology Trends for CPAs and CFOs 2026 Update - John Higgins</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>Updating on the Accounting Pipeline and Impacts to the CPA Profession: Part 2 - Josh McGowan</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>The AI Revolution in 2026: What CPAs Should Know - John Higgins</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>Private Equity and the Accounting Industry - Josh McGowan</b>
<b>11:50AM-1:30PM</b>	<b>Leading Through Disagreement - Ed Robinson</b>
<b>11:50AM-1:30PM</b>	<b>Agentic AI for CPAs: Automate Workflows with Intelligence - John Higgins</b>

## **Friday, August 14**

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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>2026 Accounting and Auditing Update: Part 1 - Josh McGowan</b>

<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 - 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>2026 Accounting and Auditing Update: Part 2 - Josh McGowan</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>Accounting for Cryptocurrency and Utilizing AI - Josh McGowan</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>AI 101 pt 3 - John Higgins</b>

# Las Vegas - October 26-30, 2026

## Monday, October 26

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7:30-9:10 AM	<b>2026 Tax Update: Critical Issues Impacting Individuals: Part 1</b> - Mark Seid
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> - Mark Seid
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> - Mark Seid
11:50AM-1:30PM	<b>Navigating Revenue Recognition</b> - Jennifer Louis

## Tuesday, October 27

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7:30-9:10 AM	<b>2026 Tax Update: Critical Issues Impacting Businesses: Part 1</b> - Mark Seid
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> - Mark Seid
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> - Mark Seid
11:50AM-1:30PM	<b>Simplifying the Complex: GAAP Alternative for Private Companies</b> - Jennifer Louis

## Wednesday, October 28

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- 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

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- 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	<b>Audit Power-Up: Maxizing 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>Excel Power Features and Functions</b> - Tommy Stephens, K2
9:40-11:20 AM	<b>Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues Pt 2</b> - Jennifer Louis
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>Driving Financial Performance With Power BI and AI-Part 1</b> - Tommy Stephens, K2
11:50AM-1:30PM	<b>Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues Pt 3</b> - Steve Siegel
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>Driving Financial Performance With Power BI and AI - Part 2</b> - Tommy Stephens, K2

## Friday, October 30

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7:30-9:10 AM	<b>"The LLC vs the S Corporation – Planning Choices and Considerations"</b> - Steve Siegel
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>2026 Technology Essentials for Busy Professionals - Tommy Stephens, K2</b>
<b>9:40-11:20 AM</b>	<b>Capital Gain Planning After OBBBA – Qualified Small Business Stock – Opportunity Zone Funds - Steve Siegel</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 Tools And How They Are Changing - Tommy Stephens, K2</b>
<b>11:50AM-1:30PM</b>	<b>Income Taxation of Trust and Estates - Steve Siegel</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>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>

# Boca Raton - November 2-6, 2026

## Monday, November 2

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7:30-9:10 AM	<b>2026 Tax Update: Critical Issues Impacting Individuals: Part 1</b> - Mark Seid
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> - Mark Seid
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> - Mark Seid
11:50AM-1:30PM	<b>Accounting Adventures: Navigating Financial Instruments</b> - Jeff Sailor

## Tuesday, November 3

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7:30-9:10 AM	<b>2026 Tax Update: Critical Issues Impacting Businesses: Part 1</b> - Mark Seid
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> - Mark Seid
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> - Mark Seid
11:50AM-1:30PM	<b>The Fraud Battle Plan</b> - Jeff Sailor

## Wednesday, November 4

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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>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>Technology Trends for CPAs and CFOs 2026 Update</b> - John Higgins
9:40-11:20 AM	<b>S Corporations: Tax Compliance, Elections, and Best Practices</b> - Arthur Werner
9:40-11:20 AM	<b>World's Liveliest Accounting Update Pt 2</b> - Jeff Sailor
9:40-11:20 AM	<b>Leading the Firm Forward</b> - Ed Robinson
9:40-11:20 AM	<b>The AI Revolution in 2026: What CPAs Should Know</b> - John Higgins
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>World's Liveliest Accounting Update Pt 3</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>Agentic AI for CPAs: Automate Workflows with Intelligence</b> - John Higgins

## Thursday, November 5

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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>Simplifying the Complex: GAAP Alternatives for Private Companies</b> - Jeff Sailor
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>Closely Held, Financially Free: Strategies for Business Owners</b> - Jeff Sailor
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>From Theory to Practice: SSARS and Preparation Engagements</b> - Jeff Sailor
11:50AM-1:30PM	<b>Turn Your Firm Into a Weapon</b> - Ed Robinson & Jeff Rattiner
11:50AM-1:30PM	<b>Smarter Tax Services with Artificial Intelligence (AI) Tools</b> - John Higgins

## Friday, November 6

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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>Fraud's Greatest Hits - Volume 2</b> - Jeff Sailor

<b>7:30-9:10 AM</b>	<b>Lifestyle Firm Building Pt 1 - Yuri Kapilovich, CPA</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>Data-Driven Leadership: Essential Metrics for Controllers and CFOs - Jeff Sailor</b>
<b>9:40-11:20 AM</b>	<b>Lifestyle Firm Building Pt 2 - Yuri Kapilovich, CPA</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>Crypto, Blockchain, and NFTs: Unlocking the Mysteries - Jeff Sailor</b>
<b>11:50AM-1:30PM</b>	<b>Lifestyle Firm Building Pt 3 - Yuri Kapilovich, CPA</b>
<b>11:50AM-1:30PM</b>	<b>AI 101 Pt 3 - John Higgins</b>

# 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 2</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 3</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>

# Phoenix, AZ - November 16 - 20, 2026

## Monday, November 16

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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 17

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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 18

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7:30-9:10 AM	<b>Social Security and Medicare in 2026</b> - Steve Siegel
7:30-9:10 AM	<b>World's Liveliest Accounting Update Pt 1</b> - Jeff Sailor
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> - Karen Brosi
9:40-11:20 AM	<b>Planning for the 99%</b> - Steve Siegel
9:40-11:20 AM	<b>World's Liveliest Accounting Update Pt 2</b> - Jeff Sailor
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> - Karen Brosi
11:50AM-1:30PM	<b>Understanding the Secure Act</b> - Steve Siegel
11:50AM-1:30PM	<b>World's Liveliest Accounting Update Pt 3</b> - Jeff Sailor
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, November 19

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7:30-9:10 AM	<b>Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues Pt 1</b> - Steve Siegel
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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>Microsoft 365 for CPAs: Unlocking Hidden Productivity Tools - John Higgins</b>
<b>9:40-11:20 AM</b>	<b>Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues Pt 2 - Steve Siegel</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>Cybersecurity: Protecting Your Firm's Data and Reputation - John Higgins</b>
<b>11:50AM-1:30PM</b>	<b>Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues Pt 3 - Steve Siegel</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>Smarter Tax Services with Artificial Intelligence (AI) Tools - John Higgins</b>

## **Friday, November 20**

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<b>7:30-9:10 AM</b>	<b>The LLC vs the S Corporation – Planning Choices and Considerations - Steve Siegel</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>AI 101 Pt 1 - John Higgins</b>
<b>9:40-11:20 AM</b>	<b>Capital Gain Planning After OBBBA – Qualified Small Business Stock – Opportunity Zone Funds - Steve Siegel</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 101 Pt 2 - John Higgins</b>
<b>11:50AM-1:30PM</b>	<b>Income Taxation of Trust and Estates - Steve Siegel</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>Leading the Firm Forward - Ed Robinson</b>
<b>11:50AM-1:30PM</b>	<b>AI 101 Pt 3 - John Higgins</b>

# 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>

# Las Vegas, NV - December 14 - 18, 2026

## Monday, December 14

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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, December 15

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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, December 16

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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>World's Liveliest Accounting Update Pt 1</b> - Jeff Sailor
7:30-9:10 AM	<b>Microsoft Power Tools</b> - Tommy Stephens, K2
7:30-9:10 AM	<b>2026 California Federal Tax Update Part 1</b> - Karen Brosi
9:40-11:20 AM	<b>S Corporations: Tax Compliance, Elections, and Best Practices</b> - Arthur Werner
9:40-11:20 AM	<b>World's Liveliest Accounting Update Pt 2</b> - Jeff Sailor
9:40-11:20 AM	<b>Data Analytics - Effective Tools for Better Results</b> - Tommy Stephens, K2
9:40-11:20 AM	<b>2026 California Federal Tax Update Part 2</b> - Karen Brosi
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>World's Liveliest Accounting Update Pt 3</b> - Jeff Sailor
11:50AM-1:30PM	<b>Technology-Focused Internal Controls to Combat Theft and Fraud</b> - Tommy Stephens, K2
11:50AM-1:30PM	<b>Turn Your Firm Into a Weapon</b> - Ed Robinson & Jeff Rattiner

## Thursday, December 17

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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, December 18**

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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>Simplifying the Complex: GAAP Alternatives for Private Companies - Jeff Sailor</b>

<b>7:30-9:10 AM</b>	<b>Leading the Firm Forward</b> - Ed Robinson
<b>7:30-9:10 AM</b>	<b>2026 Technology Essentials for Busy Professionals</b> - Tommy Stephens, K2
<b>9:40-11:20 AM</b>	<b>Postmortem Estate Planning: Decedent's Estate Issues</b> - Arthur Werner
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<b>11:50AM-1:30PM</b>	<b>Leading with Vision-</b> Ed Robinson
<b>11:50AM-1:30PM</b>	<b>Technology-Focused Internal Controls to Combat Theft and Fraud</b> - Tommy Stephens, K2