

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

Wednesday, July 8

- 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

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

Friday, July 10

7:30-9:10 AM	SECURE Act 2.0 What's in Effect Now and What's Coming in 2026 - Art Werner, JD, MS
7:30-9:10 AM	Accounting Adventures: Navigating Financial Instruments - Jeff Sailor, CPA

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