

Newport Beach, CA - December 7 - 11

Monday, December 7

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

Tuesday, December 8

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

Wednesday, December 9

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	Technology Trends for CPAs and CFOs 2026 Update - John Higgins
7:30-9:10 AM	2026 California Federal Tax Update Part 1 - Jane Ryder
9:40-11:20 AM	Planning for the 99% - Steve Siegel
9:40-11:20 AM	Accounting in Action: The Year's Most Important Update Pt 2 - Jennifer Louis
9:40-11:20 AM	The AI Revolution in 2026: What CPAs Should Know - John Higgins
9:40-11:20 AM	2026 California Federal Tax Update Part 2 - Jane Ryder
11:50AM-1:30PM	Understanding the Secure Act - Steve Siegel
11:50AM-1:30PM	Accounting in Action: The Year's Most Important Update Pt 3 - Jennifer Louis
11:50AM-1:30PM	Agentic AI for CPAs: Automate Workflows with Intelligence - John Higgins
11:50AM-1:30PM	Turn Your Firm Into a Weapon- Ed Robinson & Jeff Rattiner

Thursday, December 10

7:30-9:10 AM	Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues: Part 1 - Steve Siegel
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7:30-9:10 AM	Audit Power-Up: Maximizing Analytical Procedures for Stronger Evidence - Jennifer Louis
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: Part 2 - Steve Siegel
9:40-11:20 AM	The Fraud Battle Plan- Jennifer Louis
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	Cybersecurity: Protecting Your Firm's Data and Reputation- John Higgins
11:50AM-1:30PM	Estate Planning: Rules, Tools, Using Case Studies to Demonstrate Planning Issues: Part 3 - Steve Siegel
11:50AM-1:30PM	Cash Flow Confidence- Jennifer Louis
11:50AM-1:30PM	Leading Through Disagreement - Ed Robinson
11:50AM-1:30PM	Smarter Tax Services with Artificial Intelligence (AI) Tools - John Higgins

Friday, December 11

7:30-9:10 AM	The LLC vs the S Corporation - Planning Choices and Considerations - Steve Siegel
7:30-9:10 AM	Juggling the Numbers: Financial Reporting and Analysis - Jennifer Louis

7:30-9:10 AM	Leading with Vision - Ed Robinson
7:30-9:10 AM	AI 101: Part 1 - Introduction to AI - 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	The Impact of Environmental, Social and Governance (ESG) - Related Matters on Financial Statements and Audits - Jennifer Louis
9:40-11:20 AM	Divorce - The Financial Nightmare - Being Smart During the Process - Jeff Rattiner
9:40-11:20 AM	AI 101: Part 2 - Microsoft Copilot - John Higgins
11:50AM-1:30PM	Income Taxation of Trust and Estates - Steve Siegel
11:50AM-1:30PM	Supervisory Skills - Coaching Staff to Stay on the Right Track- Jennifer Louis
11:50AM-1:30PM	Leading the Firm Forward - Ed Robinson
11:50AM-1:30PM	AI 101: Part 3 - ChatGPT - John Higgins