

Boca Raton - November 2-6, 2026

Monday, November 2

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 1 - Mark Seid
7:30-9:10 AM	Cash Flow Confidence: Get it Right Every Time - Jeff Sailor
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Individuals: Part 2 - Mark Seid
9:40-11:20 AM	Navigating Revenue Recognition: Key Insights for Accountants - Jeff Sailor
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Individuals: Part 3 - Mark Seid
11:50AM-1:30PM	Accounting Adventures: Navigating Financial Instruments - Jeff Sailor

Tuesday, November 3

7:30-9:10 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 1 - Mark Seid
7:30-9:10 AM	Accounting for Inventory - Jeff Sailor
9:40-11:20 AM	2026 Tax Update: Critical Issues Impacting Businesses: Part 2 - Mark Seid
9:40-11:20 AM	Estimates, Contingencies, and Going Concerns: Accounting for the Unknown - Jeff Sailor
11:50AM-1:30PM	2026 Tax Update: Critical Issues Impacting Businesses: Part 3 - Mark Seid
11:50AM-1:30PM	The Fraud Battle Plan - Jeff Sailor

Wednesday, November 4

7:30-9:10 AM	Planning for the 99% - Steve Siegel
7:30-9:10 AM	World's Liveliest Accounting Update Pt 1 - Jeff Sailor
7:30-9:10 AM	Understanding the Technical Disciplines of Personal Financial Planning - Jeff Rattiner
7:30-9:10 AM	Technology Trends for CPAs: 2026 Update - John Higgins
9:40-11:20 AM	Understanding the Federal Gift Tax 2026 - Steve Siegel
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 AI Revolution in 2026: What CPAs Should Know - John Higgins
11:50AM-1:30PM	Income Taxation of Trusts and Estates 2026 - Steve Siegel
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	Agentic AI for CPAs: Automate Workflows with Intelligence - John Higgins

Thursday, November 5

7:30-9:10 AM	The Trust Course Part 1 - Basic Characteristics and Elements of Trusts - Steve Siegel
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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	The Trust Course Part 2 - Charitable Trusts, GRATs and QPRTS - Arthur Werner
9:40-11:20 AM	Accounting for Construction Contractors - 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	Cybersecurity: Protecting Your Firm's Data and Reputation - John Higgins
11:50AM-1:30PM	The Trust Course Part 3 - IDGTs, SLATs, Dynasty Trusts and More - Steve Siegel
11:50AM-1:30PM	From Theory to Practice: SSARS and Preparation Engagements - Jeff Sailor
11:50AM-1:30PM	Turn Your Firm Into a Weapon - Ed Robinson & Jeff Rattiner
11:50AM-1:30PM	Smarter Tax Services with Artificial Intelligence (AI) Tools - John Higgins

Friday, November 6

7:30-9:10 AM	Social Security and Medicare in 2026 - Steve Siegel
7:30-9:10 AM	Fraud's Greatest Hits - Volume 2 - Jeff Sailor

7:30-9:10 AM	Lifestyle Firm Building Pt 1 - Yuri Kapilovich, CPA
7:30-9:10 AM	AI 101 Pt 1 - John Higgins
9:40-11:20 AM	Retirement Distributions and the Secure Act - Steve Siegel
9:40-11:20 AM	Data-Driven Leadership: Essential Metrics for Controllers and CFOs - Jeff Sailor
9:40-11:20 AM	Lifestyle Firm Building Pt 2 - Yuri Kapilovich, CPA
9:40-11:20 AM	AI 101 Pt 2 - John Higgins
11:50AM-1:30PM	Business Succession Planning - 2026 - Steve Siegel
11:50AM-1:30PM	Crypto, Blockchain, and NFTs: Unlocking the Mysteries - Jeff Sailor
11:50AM-1:30PM	Lifestyle Firm Building Pt 3 - Yuri Kapilovich, CPA
11:50AM-1:30PM	AI 101 Pt 3 - John Higgins