

PROFESSIONAL DEVELOPMENT- Day 1



7:30 - 9 a.m.

Latest Developments in Employment Law

Adam T. Dougherty/Shareholder/Ogletree/Dallas; and Sean C. Urich/Shareholder/Ogletree/Dallas

Adam and Sean will discuss the latest developments from the CDC on masks, mandatory vaccine policies, non-compete and arbitration agreements, Texas sexual harassment law, and the effect of the new Texas open carry laws on your firm's or company's policies.

9 - 9:10 a.m.

Break

9:10 - 10:10 a.m.

How to Master Social Media for Small Business

Terry Sullivan/Founder/Buzz Pro/Dallas

Attend Terry's presentation to get the latest social media tips and strategies that will help you maximize your social media channels, engage your followers, track your performance and grow your business.

10:10 - 10:20 a.m.

Break

10:20 - 11:35

Leveraging Technology for Operational Effectiveness - How Manufacturing is Going Through Its Next Evolution, Texas Manufacturers Assistance Center Team

Technology is evolving at an astronomical pace and is transforming how we live and interact. During this session, the speaker will discuss the origins of Smart Manufacturing, what it means and where it is headed. The audience will be exposed to nine key technologies that enable the smart factories of the future and how some businesses are preparing themselves to transform, streamline and improve their operations. We will share a few real-life examples where these technological deployments have enabled manufacturers to gain a competitive edge. Finally, learn about the benefits of being early adaptors to the forthcoming changes in manufacturing practices.

11:35 - 11:45 a.m.

Break

11:45 a.m. - 12:35 p.m.

Lunch Topic: ESG Reporting - A Gateway to Performance

Jennifer D. Sadenwater, CPA/Managing Director/ESG Lynk/Houston

In this session, participants will gain insight into how the ESG reporting process can help to identify strengths and weaknesses in an organization – presenting opportunities for strategic positioning. We will also discuss best practices among companies to prepare for future regulation over ESG-related disclosures.

12:35 - 12:45 p.m.

Break

12:45 - 2 p.m.

Reality Based Investing

Steve Goodman, CPA, CFP®/President/Goodman Financial Corporation/Houston

This presentation will provide information on how new headlines, prognosticators and even data can be misleading if not looked into thoroughly. Discussion will include investing strategies to protect your future.

2 - 2:10 p.m.

Break

2:10 - 3:40 p.m.

Retirement and Social Security Planning: 'Start Now or Forever Hold Your Peace'

J. Miller Bentley/Financial Advisor/LGT/Dallas

Social Security has long been relied upon as sustainable income throughout post-working years, beginning payments at the natural retirement age of 65 and ceasing roughly 15-20 years later. At least, that is how Social Security and retirement used to function. With an ever-changing vision of retirement life, it is imperative that individuals understand the role Social Security benefits might, or might not, have in a successful retirement plan.

PROFESSIONAL DEVELOPEMENT- Day 1 cont.

3:40 - 3:50 p.m.

Break

3:50 - 4:50 p.m.

Leadership Without the Title

Stevie Dawn Carter, Ph.D./CEO/Stevie Dawn Inspires, LLC/Mansfield, TX

Even when we do not have the title or the power, we are still leaders in our work. Being a leader means understanding the VIP skills that leaders use daily. We call these Very Impactful Practices. Think of it as eight things you can do every day to establish your leadership brand. Whether it is learning how to communicate a message effectively or managing conflict in a positive way, these leadership skills create success regardless of your level. It is not about being a boss or even being a supervisor. Leadership is about influencing people towards a shared goal. You must lead yourself before you can lead others.

PROFESSIONAL DEVELOPMENT- Day 2

7:30 - 8:45 a.m.

Understanding Emotional Intelligence

Stevie Dawn Carter, Ph.D./CEO/Stevie Dawn Inspires, LLC

Whether you're having conversations face-to-face, over the phone or via email, it is not just about what you say, but also how you say it. Emotional intelligence is the learned ability to manage emotions effectively and interpret messages correctly. This workshop will explore the process of utilizing emotional intelligence daily.

8:45 - 8:55 a.m.

Break

8:55 - 9:55 a.m.

Excel Tips and Tricks

Jay Smith, CFE/Director/Jefferson Wells/Dallas

We will be reviewing some lesser-known tips and tricks in Excel to make life easier, especially in these times of increased data usage in order to make sound business decisions.

9:55 - 10:05 a.m.

Break

10:05 - 11:20 a.m.

Conquering Task Overload

Patricia Hendrix/Director/Woodard Institute/Canton, Georgia

In a world where reminders, tasks and to-do's come at us faster than we can process, how do we maximize our productivity while not drowning in task overload? This course explores how our brain manages tasks and outlines an effective approach for task management. Using David Allen's 5-step system for "Getting Things Done", you can achieve Mind Like Water and become the most productive YOU possible.

11:20 - 11:30 a.m.

Break

11:30 a.m. - 12:20 p.m.

Lunch Topic: Get a G.R.I.P. and Grow in Peace

Dena Jansen, CPA/Founder/CEO/Dena Speaks/Buda

The profession is constantly venturing into new frontiers and it's time we face the facts. Change is here to stay. Learning new things will be required, and it can be mentally and emotionally exhausting to navigate. But instead of leaning into anger or angst, there is a way to get a G.R.I.P. and grow in peace. Join Dena for a conversation on how we can reduce the overwhelm and tackle personal and professional growth challenges with a fresh and focused perspective.

12:20 - 12:30 p.m.

Break

PROFESSIONAL DEVELOPMENT- Day 2 cont.

12:30 - 1:45 p.m.

What's New in QuickBooks Desktop 2022

Laura Madeira/President/ACS, Inc./Dallas

This course methodically covers the new features in the various editions of QuickBooks Desktop Plus 2022. The presenter discusses and demonstrates the features that are new and improved for QuickBooks Desktop users.

1:45 - 1:55 p.m.

Break

1:55 - 3:25 p.m.

DE&I: The Business Case for Creating "Belonging"

Cheryl D. Orr, Principle/Owner, Insight HR Partners, LLC

This presentation will provide an overview of DE&I principles with a focus on the workplace. We'll make the business case for assuring that current employees and new talent feel like they belong in your workplace. Examples of how to create a workplace where employees feel like they belong and can bring their authentic selves to work will be presented.

3:25 - 3:35 p.m.

Break

3:35 - 4:50 p.m.

How to Manage Your Team

Kenny Broom, CPA, Chairman-elect, TXCPA Dallas/Senior Manager, Audit/Armanino, LLP/Dallas

Jeff Owens, CPA/Audit Partner/Armanino, LLP/Dallas

Managing teams has become a lot more complicated in the last two years. This session will discuss ideas on managing a diverse team in a complicated environment. Learn best practices for managing in hybrid, in-person and Zoom environments.