

8 a.m. - 8:50 a.m. - General Session: Professional Issues Update for Texas

Sheila Enriquez, JD, CPA, CFF, CVA/Chief Diversity, Equity & Inclusion Officer and Texas Market Leader/Crowe LLP/Houston

Accounting & Auditing Track

9 a.m. - 9:50 a.m. - Accounting & Auditing Updates

C. Eric Huddleston, CPA/Partner/ABIP P.C./Houston

10 a.m. - 10:50 a.m. - What to Do When the Government Comes Calling: Tips From a Former FBI Agent and Federal Prosecutor

Tony Box/Gray Reed/Houston

11 a.m. - 11:50 a.m. - Schedules K2 and K3

*Hillary Green/Senior Manager/RSM US/Austin
Trang Phan, JD/Senior Director/RSM US LLP/Dallas*

11:50 a.m. - 12:50 p.m. - Lunch Break

12:50 p.m. - 1:40 p.m. - Appropriate Advice for M&A Inquiries

Matt Gilbert/Founder/Gilbert & Pardue Transaction Advisors/Mont Belvieu

1:55 p.m. - 2:45 p.m. - Best Methods for Businesses to Protest Property Taxes

Mark Dzeda, CPA, CMI/President/Industrial Tax Consulting/Houston

3 p.m. - 3:50 p.m. - Texas Franchise Tax

Mark Dzeda, CPA, CMI/President/Industrial Tax Consulting/Houston

Technology Track

9 a.m. - 9:50 a.m. - Best Practices in Transaction Tax System Implementation

Scott Walters/Principal Consultant/Vertex, Inc./Gatlinburg

10 a.m. - 10:50 a.m. - Online Automation

Bryan Wilton, CPA/LBMC Technology Solutions, LLC/Kansas City

11 a.m. - 11:50 a.m. - The Four W's of Social Security

David P. Zander, CFP/Owner & Founder/Back Nine Financial, LLC/Boerne

11:50 a.m. - 12:50 p.m. - Lunch Break

12:50 p.m. - 1:40 p.m. - Build and Increase Your Estate Planning Consulting Practice (Part 1)

Leonard Weiner, JD, CPA, MBA, AEP®/Tax, Estate, and Business Attorney/Leonard Weiner Law, PLLC/Houston

1:55 p.m. - 2:45 p.m. - Build and Increase Your Estate Planning Consulting Practice (Part II)

Leonard Weiner, JD, CPA, MBA, AEP®/Tax, Estate, and Business Attorney/Leonard Weiner Law, PLLC/Houston

3 p.m. - 3:50 p.m. - Nuts and Bolts of Cryptocurrency Taxation

Shehan Chandrasekera, CPA/ Head of Tax Strategy/CoinTracker/Delaware

Professional Development Track

9 a.m. - 9:50 a.m. - Employment Law Update

Craig Carter/Attorney/Jackson & Carter/Austin

10 a.m. - 10:50 a.m. - Intermediate Quickbooks

Ann Edwards Williams, CPA/Houston

11 a.m. - 11:50 a.m. - Conflict Resolution

Austin Tenette/Focal Point Coaching

11:50 a.m. - 12:50 p.m. - Lunch Break

12:50 p.m. - 1:40 p.m. - SEC Investigations: Views from a Division of Enforcement Accountant

Melvin Warren/Senior Enforcement Accountant/U.S. Securities and Exchange Commission/Ft. Worth

1:55 p.m. - 2:45 p.m. - Unconscious Bias and its Impact on Leadership

Terrence Black/Owner/Express Employment Professionals/ Houston

3 p.m. - 3:50 p.m. - Social Media With Limited Bandwidth and Budget

*Amy Rios/Marketing Director/Texas Hospital Association/Austin
Julia Mann/Strategic Communications Manager/Texas Hospital Association/Austin*

4:10 p.m. - 5:40 p.m. - General Session: The Cybersecurity Trap? Why Cybersecurity and Cyber Compliance are NOT the Same

Moderator: Kristie Ondracek; Panelists: Wayne Hunter/AvTek, Charles Denyer/Author, Emily Jones, Larry Meador



DAY TWO- JUNE 15

7 a.m. - 8 a.m. - Professional Headshots by Appointment

Accounting & Auditing Track

9 a.m. - 9:50 a.m. - Federal Tax Update (Part I)
Blaise C. Bender, JD, CPA/Attorney/Blaise C. Bender, PC/San Antonio

10 a.m. - 10:50 a.m. - Federal Tax Update (Part I)
Blaise C. Bender, JD, CPA/Attorney/Blaise C. Bender, PC/San Antonio

11 a.m. - 11:50 a.m. - Federal Tax Update (Part I)
Blaise C. Bender, JD, CPA/Attorney/Blaise C. Bender, PC/San Antonio

11:50 a.m. - 12:50 p.m. - Lunch Break

12:50 p.m. - 1:40 p.m. - Federal Tax Update (Part II)
Blaise C. Bender, JD, CPA/Attorney/Blaise C. Bender, PC/San Antonio

1:55 p.m. - 2:45 p.m. - Federal Tax Update (Part II)
Blaise C. Bender, JD, CPA/Attorney/Blaise C. Bender, PC/San Antonio

3 p.m. - 3:50 p.m. - Federal Tax Update (Part II)
Blaise C. Bender, JD, CPA/Attorney/Blaise C. Bender, PC/San Antonio

Technology Track

9 a.m. - 9:50 a.m. - Enterprise Resource Planning (ERP) – Introduction
Augustine Gavini, Ph.D./Managing Consultant/HCLTech/Phoenix

10 a.m. - 10:50 a.m. - Change Management: Making it Work for You
Alain Paolini/Vice President/Pariveda/Denver

11 a.m. - 11:50 a.m. - ChatGPT: What It Is and What It Isn't
Todd Boutte/Trenergy

11:50 a.m. - 12:50 p.m. - Lunch Break

12:50 p.m. - 1:40 p.m. - Compensation Strategy During Changing Times
Heather Gray, CPA/Founder and Senior Partner/Search Services/Bellaire

1:55 p.m. - 2:45 p.m. - IRS 101
Keith Cothroll/Tax Attorney/Law Firm of Keith A. Cothroll

3 p.m. - 3:50 p.m. - The Dark Web
Charles Denyer/Author

Professional Development Track

9 a.m. - 9:50 a.m. - Addressing Stress and Burnout in the Accounting Profession
Vicky Johnson, CPA/Accounting Instructor/University of Mary Hardin Baylor/Belton
Dale Jacobson, CPA/Kenneth Dale Jacobson CPA, PLLC/Austin

10 a.m. - 10:50 a.m. - Enhancing Your Emotional Intelligence - The DISC Advantage
Deanna Sullivan, CPA/Principal/ Sullivan Solutions/Houston

11 a.m. - 11:50 a.m. - Retaining Talent in the Workplace
Mallory Herrin, SPHR, SHRM-CP/ CEO, HerrinHR/Dallas

11:50 a.m. - 12:50 p.m. - Lunch Break

12:50 p.m. - 1:40 p.m. - Mindfulness for Greater Ease in Life
Dana Garnett/Mediator/Mindful Strategy LLC/Dallas

1:55 p.m. - 2:45 p.m. - US Data Privacy Laws - GDPR is Alive and Well in the US!
Jason Barrett, JD/Principal and Founder/JAME Consulting, LLC/Houston

3 p.m. - 3:50 p.m. - Leveraging Equity in Compensation Planning
Heather Gray, CPA/Founder and Senior Partner/Search Services/Bellaire

4:p.m. - 4:50 p.m. - Moments That Matter



DAY THREE- JUNE 16

8 a.m. - 8:50 a.m. - General Session: Don't Say the B Word Unless You Mean It: Helping Clients Who May Need Bankruptcy
Deirdre Brown, JD/Partner/Forshey & Prostok LLP/Houston

Accounting & Auditing Track

9 a.m. - 9:50 a.m. - Inflation Reduction Act in Today's Business Environment
Marianne Standley/Chamberlain Law/Houston
Umair Karowadia/ Associate/Chamberlain Law/Houston

10 a.m. - 10:50 a.m. - Technical Accounting Update
Jared Benedict/Morgan Franklin

11 a.m. - 11:50 a.m. - Current Expected Credit Loss (CECL) Implementation Insights
Gordon Dobner, CPA, Partner/FORVIS/Houston

11:50 a.m. - 12:50 p.m. - Lunch Break

12:50 p.m. - 1:40 p.m. - Private Equity Outlook
Simon Haidamous/Director/Genesis Park/Houston

Technology Track

9 a.m. - 9:50 a.m. - The Customer Engagement Experience
Minh Vo, CFBS, CDAA/Principial/Verus Financial Group/Houston

10 a.m. - 10:50 a.m. - State and Local Tax Panel Discussion
Rachel Chinukwe (Baker), CPA/STS – SALT Senior Manager/BDO USA, LLP/Dallas
Devon Dixon, CPA, CMI/STS-SALT Managing Director/BDO USA, LLP/Dallas

11 a.m. - 11:50 a.m. - Are you Ready to Grow?
Dena Jansen, CPA/Founder/Dena Speaks

11:50 a.m. - 12:50 p.m. - Lunch Break

12:50 p.m. - 1:40 p.m. - Effective Engagement and Collaboration
Alice Leong/Slalom/Chicago

Professional Development Track

9 a.m. - 9:50 a.m. - Ethics for CPAs: It's a Matter of Choice
Deanna Sullivan, CPA/Principal/ Sullivan Solutions/Houston

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Deanna Sullivan, CPA/Principal/ Sullivan Solutions/Houston

1:50 p.m. - 2:40 p.m. - General Session: Running to Rewarding Relationships
James Brown/Chief Xchange Officer/The Xchange Zone/Missouri City, TX

2:50 p.m. - 3:40 p.m. - General Session: Leadership that Counts!
Chuck Cummings, CPA, CFE/Owner/Charles C. Cummings, Jr., CPA/Pearland

ENJOY YOUR WEEKEND AND HAVE LOTS OF SUMMER FUN! THANK YOU FOR ATTENDING CPE BY THE SEA!