



2022 – 2023 NW CPA BUSINESS ROUNDTABLE DISCUSSION GROUP

If you work or live in the northwest Houston area you will want to join this group. CPAs who are in industry, public practice, and tax-exempt career areas participate in the discussions.

Location: Los Cucos – 22390 Tomball Pkwy, Houston, Texas 77070/Zoom

Time: 2:30 – 5:30 PM

CPE Credit: 3 hours

Dates, topics and speakers:

- June 23 – Tentative Rob Pennington – Calm in the Storm – Handling Stressful Situations with Calm
- July 28 – Elijah Lopez from Manske Wealth – Investment related planning
- August 18 – Minh Vo and Tony Lopez from Verus Financial - Digital Asset 101
- September 22 – Chris Maurer, JD, CFP from Park Place Financial – Social Security related
- October 27 – Austin Tenette – Strategic Planning for business and personal
- November 17 – Gerard Schreiber and Henry Grzes (AICPA) - IRS Practice Issues and IRS and AICPA Rules of Practice
- December 15 – John “The Bearded Leader” Parnell - Leadership
- January 19 – Jonathan Powell - Equitable
- May 25, 2023 – Keith Cothroll – Various Tax Subject Matters

Schedule subject to change. Suggestions for topics and discussion leaders are welcomed!

Complete and return **entire** form with payment to:
TXCPA Houston Foundation
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Or email to kondracek@txcpahouston.cpa

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