

Convergence 2024 Program Grid

Time	Dallas Ballroom A1-2	Dallas Ballroom A3	Dallas Ballroom B	Dallas Ballroom C	Dallas Ballroom D2-3
7:00am - 8:00am	Registration Visit Sponsors and Exhibits				
8:00am - 9:20am	ESG and the Accountant: Navigating Challenges and Maximizing Opportunities Omar Rodriguez <i>PwC</i>	Nonprofit Industry, Accounting and Auditing Update Neely D. Duncan Maura Jackson <i>FORVIS</i>	State Income Tax Developments Including Traps for the Unwary Timothy Horan John Iannotti Cohn Reznick	The IRS is Coming. Are You and Your Client Ready? Mary E. Wood Joel N. Crouch R. Damon Rowe Meadows Collier	Culture is not Enough: The Future of Employee Engagement in the Evolving Workplace Adam Tarnow PeopleWorks International
9:20am - 9:35am	Break Visit Sponsors and Exhibits				
9:35am - 10:25am	A New World in Income Tax Footnote Disclosures – Understanding ASU 2023-09 Kemp Johnson Alan Sandberg Deloitte	BYOB: Build Your Own Budget (and Forecasts!) Lucas LaChance Lane Gorman Trubitt	North Texas: Opportunities and Challenges for the Future Dr. Timothy Bray University of Texas at Dallas	Protecting Confidentiality: The Crucial Intersection of Attorney-Client Privilege and CPA Practice Joshua D. Smeltzer Gray Reed	Professional Issues Update Tim Pike The Bonadio Group
10:25am - 10:40am	Break Visit Sponsors and Exhibits				
10:40am - 12:00pm	Tax Legislation in 2024 and Beyond – What is Likely, What is Possible, and What is Just Plain Silly Mel Schwarz Eide Bailly LLP	Selling Your Brain, NOT Your Time Ed Kless Sage	Strategic Insights for CPAs: Unlocking Wealth Excellence with Secure Act 2.0 Mastery Christopher D. Cervantes Valorous Advisors	Audit and Assurance Update Taylor Caton The Bonadio Group	Cybersecurity & Accounting Moses Varghese Lumos Technology Services
12:00pm - 12:15pm	Break Visit Sponsors and Exhibits				
12:15pm - 1:45pm	LUNCHEON KEYNOTE PRESENTATION From Transactions to Transformations: Charting Success with the Subscription Model Ron Baker VeraSage Institute				
1:45pm - 2:00pm	Break Visit Sponsors and Exhibits				
2:00pm - 3:20pm	Tax Legislation in 2024 and Beyond – What is Likely, What is Possible, and What is Just Plain Silly Mel Schwarz Eide Bailly LLP	Accounting and Tax Issues Around Debt Modifications Brady J. Cox Jackson Walker LLP	AI In Accounting Remsen Jennings Ernst & Young LLP	The CFO Triage – Investors/Board, CEO, Independence Rudy Gonzalez, Ansira Partners Kendall Helfenbein, Vandelay Hospitality Caroline Stovall, Armanino LLP Mahesh Shetty (Moderator), ILE Homes	How to Attract and Retain Accounting Personnel Sharon Lukich Adams Britton Pavlic Ben Pinto Thomas Edwards Group
3:20pm - 3:30pm	Break Visit Sponsors and Exhibits				
3:30pm - 4:50pm	Exploring New Frontiers: The Next Generation of Contested Texas Tax Issues David E. Colmenero Meadows Collier	Accelerating the Financial Close: Automation Today! AI Tomorrow? Brian Terrell BTerrell Group	Ethics and Detecting Fraud - A Case Study Richard Bowen Ethical Leadership Speaker	4 W's of Social Security 2.0 - Maxmizing Benefits – Minimizing Contributions David P. Zander Back Nine Financial	Estate Planning for Retirement Benefits Michael D. Lum Baker Tilly