REDEFINING EXCELLENCE

BDO ALLIANCE USA CONFERENCE 2020

LIVE FROM THE COMFORT OF YOUR HOME OR OFFICE | MAY 18–21, 2020

BDO ALLIANCE USA

Each year, we bring together our valued Alliance Members, respected BDO USA and global professionals and visionary leaders to help us successfully prepare for the challenges we face in the year ahead – and beyond. This year, with the challenges we're facing from COVID-19, the BDO Alliance USA is moving our traditional event to an online program.

We are excited to bring you an offering of over 80 technical and professional skills sessions. Our 2020 online program will challenge you to stand out from the pack, bringing great ideas and insights back to your organizations and communities. We'll explore these concepts more through the pillars of Client Experience, Targeted Growth, Exceptional & Engaged People and Digital Transformation. Our focus will be on Redefining Excellence and helping you raise the bar in 2020.

REDEFINING EXCELLENCE

Exceptional Client Experience
Targeted Growth
Exceptional & Engaged People
Digital Transformation & Innovation

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SCHEDULE OF EVENTS

Please note all times listed in this brochure are in Eastern Daylight Time (EDT).

MONDAY, MAY 18

11:00 am – 12:00 pm	General Session
12:45 pm – 1:45 pm	Breakout Sessions
2:00 pm – 3:00 pm	Breakout Sessions

TUESDAY, MAY 19

11:00 am – 12:00 pm	General Session
12:15 pm – 1:15 pm	Breakout Sessions
1:30 pm – 2:30 pm	Breakout Sessions
2:45 pm – 3:45 pm	Breakout Sessions

WEDNESDAY, MAY 20

11:00 am – 11:30 am	General Session
11:45 am – 1:15 pm	Breakout Sessions
1:30 pm – 2:30 pm	Breakout Sessions
2:45 pm – 3:45 pm	Breakout Sessions

THURSDAY, MAY 21

11:00 am – 12:00 pm	General Session
12:15 pm – 1:45 pm	Breakout Sessions
2:00 pm – 3:30 pm	Breakout Sessions

REGISTRATION INFORMATION

Visit the link below to register:

https://onlinexperiences.com/Launch/QReg.htm?ShowUUID=92EFF329-A601-48AD-A741-4F7E1BF8320D

- There is no deadline to register, but you do need to sign up through our registration process to get access to the online conference site.
- The following pages showcase our new agenda with more than 80 sessions, including dates and times. In addition to joining our daily General Sessions, you can choose the breakout sessions that you want to attend as well. BDO will not need to record your selections.
- **As a convenience, there are links included for you here to manage that, so you can save the breakout sessions that you plan to attend to your calendar in advance. Or you can log in during the conference and build your agenda as you go. Selections can always be changed, up until the start of the session.**

Please note that CPE credit is estimated to be 1 credit for each 60-minute session and 1.5 credits for each 90-minute session. CPE credit is not available for the General Sessions on Monday, May 18 and Wednesday, May 20.

WHO SHOULD ATTEND?

Everyone!

The online program will appeal to a variety of technical and core business professionals in your firm. This year, with the conference moving online, more attendees will have the ability to participate than would have normally attended in Las Vegas. We welcome all of our member firms to experience the valuable training that the BDO Alliance USA provides. We look forward to having a mix of participants from every member firm represented at our 2020 event.

MONDAY, MAY 18
11:00 – 12:00 PM

General Session
BDO USA, LLP
Add session to calendar

Hear from Alliance Executive Director, Michael Horwitz along with BDO USA, LLP CEO Wayne Berson and BDO Global CEO Keith Farlinger.

MONDAY, MAY 18
12:45 – 1:45 PM

Accounting & Auditing

CECL
BDO USA, LLP
Add session to calendar

As companies look to adopt ASC 326 on Current Expected Credit Losses (CECL), members of BDO's National Accounting Department will cover developments and practice issues related to the adoption of CECL.

Stock Compensation: Practice Issues
BDO USA, LLP
Add session to calendar

As compensation packages continue to evolve, this session will cover common practice issues in accounting for stock-based compensation.

Tax

ASC 740: Tax Reform Updates
BDO USA, LLP
Add session to calendar

This session addresses the ASC 740 implications resulting from newly issued guidance by various government authorities related to tax reform. Discussion will involve considerations for scheduling temporary differences when evaluating the need for a valuation allowance on 163(j) interest limitation carryovers and provides awareness of the resources available for further guidance on ASC 740 issues.

Marketing/Business Development

SEO and Other Practices to Spark Growth and Drive Website Traffic
Betsy Gray, The Social Bullpen, LLC (BRN Member)
Add session to calendar

Most purchasing decisions begin with an online search. Google, Bing, and other search engines then drive consumers to websites that match them with the products or services they seek. If you want to attract the right clients, it's time to incorporate search engine optimization (SEO). This session will give an overview of SEO, outline key attributes for successful websites, and offer some practical solutions to increase traffic and stimulate growth for your firm.

Managing an Accounting Practice (MAP)

A Digitally Driven Firm
Roman Kepczyk, Right Networks (BRN Member)
Add session to calendar

What technologies your firm uses can make a difference in how you can streamline processes. This session will focus on the technologies that can transform and streamline production processes, as well as help you collaborate more effectively with clients.

The Ultimate Question
Jeff Pawlow, The Growth Partnership (BRN Member)
Add session to calendar

Once you realize that your best clients are your competitor's top prospects, it makes sense to adopt a framework to measure the level of satisfaction and loyalty at your firm. In this session, participants will be introduced to the leading objective measure of client loyalty—the Net Promoter Score. NPS is the same framework used by the BDO Alliance USA to measure satisfaction of Alliance members and can easily be put to use in your firm as well. By asking one single question, you can easily categorize clients as being either a promoter, passive or detractor relationship. Armed with this knowledge, you can then probe deeper to understand the true dynamics of your most important relationships.

Emerging Leaders

The Art of Query: Delivering Value by Asking the Right Questions
Brianna Johnson, ConvergenceCoaching, LLC®
(BRN Member)
Add session to calendar

The COVID-19 Crisis has pivoted our focus to help clients navigate the tax relief, CARES Act, the continued viability of their businesses and more. The good news for your firm is that your clients need your help pivoting themselves to new business models, remote work and economic conservation. This is your time to shine as an advisor! Asking the right questions, uncovers strategic opportunities that help you prioritize and drive value for others. But most of us aren't skilled in the art of query, so we tend to tell more than ask, talk more than listen. Truly trusted advisors want to learn more, so they can deliver more.

Human Resources

KPIs and Metrics for Your Talent and Learning Initiatives
Sandra Wiley, Boomer Consulting, Inc.
(Alliance Vendor Marketing Program)
Add session to calendar

Measuring productivity and progress in our firms used to start and stop on the financial side of the business. Today, we realize that identifying measurements in many areas of the firm will set us up for a higher level of success. In this session, we will share the KPIs, Metrics and Technology that you should be using to identify value in the talent spectrum of your firm.

MONDAY, MAY 18
2:00 – 3:00 PM

Accounting & Auditing

Complex Financial Instruments: Practice Issues
BDO USA, LLP
Add session to calendar

This session will cover common practice issues in Complex Financial Instruments—redeemable preferred stock, preferred stock with embedded conversion options, and warrants—as well as an overview of recent standards setting activity.

Leases
BDO USA, LLP
Add session to calendar

This session will address practice issues encountered in the adoption of ASC 842 on leases, including lessons learned from the recent adoption by public companies.

Tax

International Tax: Post Tax Reform Basics
BDO USA, LLP
Add session to calendar

Do you need a refresher on international taxation due to the significant U.S. international tax changes from the Tax Cuts and Jobs Act (TCJA)? This session explains how international corporate tax rules are applied post-TCJA, including global intangible low-taxed income (GILTI), foreign derived intangible income (FDII), base erosion and anti-abuse tax (BEAT) and international items affecting pass-through entities. The session also provides a swift refresher on Subpart F and foreign tax credits.

Marketing/Business Development

Developing a Business Pipeline that Actually Works
Jon Hubbard, Boomer Consulting, Inc.
(Alliance Vendor Marketing Program)
Add session to calendar

There are dozens, if not hundreds, of business development conversations happening with clients and prospects in your firm on a weekly basis. Unfortunately, most firms haven't figured how to consolidate, track and coordinate all of these conversations. This results in a significant amount of revenue leaking through your business development pipeline regularly. In this session, you will learn the critical components your firm's business development process needs in order to stop leaking revenue and start capturing it.

Industry

What's Ahead for the Healthcare Industry: Accounting & Regulatory Update
BDO USA, LLP
Add session to calendar

Change is happening rapidly in healthcare. The new lease standard, telehealth, goodwill impairment and revenue recognition are just several examples of the future. We'll discuss how these changes can help our clients advance and stay ahead of future changes. The session will cover the latest in the accounting and regulatory environment, including challenges and opportunities ahead.

Advisory

The Risk Game: Is management focused too heavily on Black Swan events instead of Grey Rhino events? How to prepare the C-Suite and Board
BDO USA, LLP
Add session to calendar

In this session, you'll hear about specific stories and case studies where leaders are preparing clients to be ready for Grey Rhino events (risks where the likelihood and impact combined lead to much higher stakes). We will cover these Grey Rhino risks that are now facing management and boards. Topics include: fraud and unique plans that fraudsters have built; gaining a strong understanding of a company's culture and how you can actually audit it; disruptors that management should be paying attention to; disaster preparedness; and the interconnectedness of all these risks and how to address it.

Managing an Accounting Practice (MAP)

Re-Tooling Your Firm for the Knowledge-Worker Age
Jeff Pawlow, The Growth Partnership (BRN Member)
Add session to calendar

As the profession sits at an evolutionary pivot point, firms are grappling with how to command a premium fee in an increasingly commoditized market. The systems currently in place at most firms were inherited from the previous generation and may actually work against what is needed to thrive in the generation to come. Explore how legacy thinking inhibits the pivot from compliance to advisory services and how you must re-tool your "factory" to succeed in the emerging landscape.

Emerging Leaders

Developing and Retaining Your High Potentials
Infopro Learning, Inc. (BRN Member)
Add session to calendar

Current high-potential leadership programs need significant retooling and rethinking to support future leaders. The rate of change is exponentially accelerating, and more than 40% of today's leadership roles will look dramatically different in five years. This workshop provides proven strategies for preparing high potentials to lead organizations faced with digital disruptions and a complex, ambiguous and challenging future. Senior leaders and owners of businesses of all sizes are seriously worried about the readiness of their organizations to develop and retain their high potentials. This program helps firms and their clients plot a strong new direction to identify, develop and retain their key players.

TUESDAY, MAY 19
11:00 – 12:00 PM

General Session
Mike Platt, The Platt Group
Add session to calendar

Mike Platt, managing principal of The Platt Group, will be our keynote speaker on Tuesday. The Platt Group/INSIDE Public Accounting assists accounting firm leaders in making their firms more efficient, growth-minded, profitable and forward-looking. Mike will present the results and trends highlighted in the current IPA surveys and facilitate a panel discussion with three "Best of the Best" Alliance firm managing partners.

TUESDAY, MAY 19
12:15 – 1:15 PM

Accounting & Auditing

Ensuring Engagement Quality When Performing SSARS Engagements
Rich Daisley, Surgent CPE
(Alliance Learning Vendor Program)
Add session to calendar

Reviews, compilations and preparations of financial statements are a vital service that public accountants provide to many smaller and medium sized entities. While not as complex as an audit, these engagements nonetheless require a high level of expertise of the accountant as well as adherence to the AICPA's standards for such engagements, which are found in the Statement of Standards for Accounting and Review Services (SSARS). In this session, we'll review the major differences between the services covered by the SSARS, provide an overview of the standards covering these engagements, and discuss recently issued and proposed changes to the SSARS.

SEC Matters: Comment Letter Trends and an Overview of the Filing Review and Comment Letter Process
BDO USA, LLP
Add session to calendar

This session will cover various SEC topics, including the SEC filing review process, the SEC comment letter process, SEC comment letter trends and other emerging issues.

Tax

Taxation of Executive Compensation
BDO USA, LLP
Add session to calendar

Many questions arise surrounding the rules related to executive compensation, including taxation, limitation and timing. This session focuses on the common areas of inquiry, including 409A – nonqualified deferred compensation, 162(m) – $1 million deduction limitation, and 280G – golden parachute payments. We will cover scenarios and discuss optimal structuring and planning opportunities associated with each..

Marketing/Business Development

The Buyer's Journey: What It Is and Why It Matters
BDO USA, LLP
Add session to calendar

Before selecting a professional services provider, a prospect will go through a discovery, research and evaluation process. This process is called the buyer's journey. Buyers don't want to be targeted or closed; they want to better understand their business issues, find relevant insights and evaluate solutions. They want to find the *right* people who can alleviate their challenges and help them reach their business and financial goals. By understanding your buyer's journey and providing value and answers at every stage, you can differentiate your firm and nurture customers toward deciding to buy from you. Join this session to hear proven strategies to enhance your buyer's journey, align your marketing strategies and drive higher win rates.

Advisory

Applying Professional Skepticism to Self-Insured Liability Estimates
BDO USA, LLP
Add session to calendar

The PCAOB's new standard AS 2501, *Auditing Accounting Estimates*, arrives at a time when corporate balance sheets have experienced material adverse developments on actuarial estimates. This new emphasis on the application of professional skepticism can be particularly challenging when applied to actuarial professional judgment, especially in regard to potential management bias. This presentation will explore ways to interact with actuaries to support their expert judgments with professional skepticism. The BDO Actuarial Team will provide examples of work that external actuaries should present to reveal details about actuarial methods and material assumptions.

Managing an Accounting Practice (MAP)

Contemporary Organic Growth Strategies
Bob Lewis, The Visionary Group (BRN Member)
Add session to calendar

This session will start by reviewing the financial steps of growth plans, including the overlooked element of "run-off." We will demonstrate modern approaches to winning business, explain how to instill a sales culture, and provide ideas on increasing staff engagement in the growth process. The session will detail how to create a client mining program, provide depth on which types of prospects to pursue and how to do so, and describe how to target and approach referral partners in a different way than the traditional referral exchange process. We will go into detail on how to market Client Accounting Services and R&D credits, how to create an Exit and Succession niche to service a firm's aging client base, and how to develop an advisory center.

Emerging Leaders

10 Attributes of an Advisor and Consultant
Sandra Wiley, Boomer Consulting, Inc.
(Alliance Vendor Marketing Program)
Add session to calendar

As we move into the world of consulting, many are asking questions about what skills, attributes and talents a true consultant/advisor will need to possess. In this session, we will explore 10 "must have" characteristics that all professionals must either naturally have or will need to upskill into to thrive in the newly transformed firm of the future.

Human Resources

Exceptional and Engaged People: The Stages of Staff Development
BDO USA, LLP
Add session to calendar

When attracting and retaining our key assets is one of the biggest challenges our firms face, learn the four stages of staff development and tactics for each stage. As leaders of growth organizations, this session will help you leverage this understanding and learn the tools you can use to build a firm of exceptional and engaged people.

TUESDAY, MAY 19

1:30–2:30 PM

Accounting & Auditing

Revenue Recognition
BDO USA, LLP
Add session to calendar

This session will describe practice issues encountered and lessons learned from the adoption of ASC 606.

Tax

Tax Controversy and Procedure Update
BDO USA, LLP
Add session to calendar

This session focuses on the general IRS examination and appeals functions. Timelines of typical and atypical examinations through appeals are discussed, along with the various procedural options available to those undergoing examination. Other topics include recent developments in federal tax procedure, current court cases, trends in IRS examinations and appeals, and other relevant IRS activity.

Marketing/Business Development

Marketing 101
Christine Hollinden, Hollinden marketers + strategists (BRN Member)
Add session to calendar

This session will focus on the essential elements of service marketing, including building or expanding upon a marketing plan for your firm. We will discuss understanding your market and customer needs and how to use that in creating effective marketing strategies. The session will also touch on online marketing efforts, like Google search, social media, and email, to attract and connect with current and prospective clients. Whether your firm has a robust marketing function, or you are just getting started, this session will have takeaways for everyone!

Industry

Private Equity: Tech's Best Kept Secret
BDO USA, LLP
Add session to calendar

In this session, BDO's National Technology Practice Leader will discuss the role of private equity within the technology industry, covering topics that include strategies to fuel targeted growth, financing trends and the impact of private equity on tech IPO and M&A strategies.

Advisory

Building and Growing your Risk Advisory Services Business
BDO USA, LLP
Add session to calendar

In this session, we'll cover the key steps to building and growing a Risk Advisory Services practice.

Topics will include:

- What is your winning aspiration?
- Where will you play?
- How will you win?
- What capabilities must be in place?
- What are your strategic goals?

The book *Playing to Win: How Strategy Really Works* by A.G. Lafley and Roger Martin will provide a framework for the above topics.

Managing an Accounting Practice (MAP)

Examining the Sacred Cows of the Profession: Is It Time to Go to Slaughter?
Mike Platt, The Platt Group, LLC
Add session to calendar

This session will challenge the set of beliefs that have been the foundation of the public accounting profession for decades. Many of these belief systems have evolved into untouchable pillars of firm structure—such as "partners are the right ones to own relationships," or "team members need to be on your payroll to ensure success." We'll explore these "sacred cows" and offer alternative ideas that are being implemented by other firms to pave the way for a different future.

Emerging Leaders

Finding the Synergy, Empowering Your Team
John Cummings, Anderson ZurMuehlen & Co., P.C. (CPA Member)
Add session to calendar

Too many leaders operate on the philosophy that the devil is in the details and spend their time managing the minutia. This session will discuss how to release control of everything in order to allow employees to grow and develop and not hamstring their abilities to take on more complex problems.

Human Resources

Put Me In! Valuable Tips on How to Coach and Mentor Your Teams
Heather Kinzie, The STRIVE Group, LLC
(Alliance Learning Vendor Program)
Add session to calendar

This session will focus on areas such as coaching vs. mentoring; recognizing when coaching is needed as opposed to when mentoring is needed; and creating coaching and mentoring plans.

TUESDAY, MAY 19
2:45 – 3:45 PM

Accounting & Auditing

Variable Interest Entities and Consolidation Matters: Practice Issues
BDO USA, LLP
Add session to calendar

This session will cover common practice issues in consolidation issues, including variable interest entities

Tax

International Tax: New M&A Tax Strategies
BDO USA, LLP
Add session to calendar

Tax reform has altered the landscape of entity structures, causing an increase in transactional considerations. This session will focus on bringing awareness to the new provisions impacting taxable transactions, including the 100% DRD, CFC anti-deferral rules and global intangible low-taxed income (GILTI), application of Section 1248 and 964(e), Section 367, and other international tax provisions.

Marketing/Business Development

Marketing Technology
Christine Hollinden, Hollinden marketers + strategists (BRN Member)
Add session to calendar

This session will help firms determine what technology you may need for your marketing efforts. A review of how to decide on which technology is best, what to budget and implementation considerations will be discussed.

Industry

Supply Chain Excellence Redefined: The Impact of Industry 4.0, Digital Transformation and the Changing Tax and Trade Environment on Our Clients' Supply Chains
BDO USA, LLP
Add session to calendar

During this session, attendees will hear about key elements and capabilities of effective manufacturing and distribution supply chains, how our clients' supply chains are being impacted by digital transformation activities as well as Industry 4.0 concepts, and review examples of the services we can provide to assist our clients in their journey. We will also explore how multinational organizations must monitor business impacts resulting from the significant, continued global tax law changes coming out of the OCED BEPS initiative, coupled with trade tensions resulting from U.S.-China trade negotiations and Brexit. BDO's supply chain leaders and international tax professionals will walk you through considerations for supply chain realignments.

Advisory

Financial Risk Management
BDO USA, LLP
Add session to calendar

This session will focus on how to identify risk, quantify the exposure and provide solutions to mitigate the risk. Topics to be covered include: credit risk, market risk, asset/liability management, troubled debt restructuring, mortgage servicing rights models, governance and compliance, determining materiality thresholds and ensuring dynamic monitoring, risk sensitivity, standardization, and future model risk management.

Managing an Accounting Practice (MAP)

Building New Revenue Streams: Leveraging Information Technology & Big Data
Anderson ZurMuehlen Technology Services (BRN Member)
Add session to calendar

We understand that accounting firms view information technology as a costly but necessary expense. Our team of qualified professionals specializes in leveraging information technology and big data to generate revenue and reduce costs. In this session, you will learn how IT can be a robust engine for revenue growth and increased profitability.

Emerging Leaders

Becoming a Powerful and Effective Delegator
Brianna Johnson, ConvergenceCoaching, LLC®
(BRN Member)
Add session to calendar

Delegation is a leadership must-have especially in our new remote paradigm. Effective delegation ensures clarity about expectations, develops team members so they can progress and take on more, and ensures succession. Unfortunately, real delegation is often desired and seldom practiced. At some point or another, we're all guilty of one or more of the seven "sins" of delegation.

Facilitation Skills Workshop
BDO USA, LLP
Add session to calendar

This hands-on workshop is designed to move you beyond fundamental facilitation skills and into higher-level meeting facilitation. Participants will practice facilitation and receive immediate feedback; work through real-life scenarios together; and leave with some excellent facilitation tools, techniques and best practices that can be applied immediately.

WEDNESDAY, MAY 20
11:00 – 11:30 AM

General Session
BDO USA, LLP
Add session to calendar

Hear from BDO USA, LLP's COO Steve Ferrara and find out the winners of our annual BDO Alliance awards!

WEDNESDAY, MAY 20
11:45 – 1:15 PM

Accounting & Auditing

2018 Yellow Book: What You Need to Know
BDO USA, LLP
Add session to calendar

BDO's nonprofit leaders will discuss changes due to the 2018 Yellow Book that becomes effective for June 30, 2020 engagements. This revision represents the first comprehensive overhaul of the Yellow Book standards since 2011. During this session, we will discuss new standards and what the new Yellow Book does and does not require auditors to do, including requirements related to ethics, independence, professional judgment, competence and CPE, internal controls, quality control and peer review.

Tax

PCS Tax Law Updates Including Changes to Required Minimum Distributions
BDO USA, LLP
Add session to calendar

This session will ensure participants are able to improve client experience by recognizing the impact individual taxes have on a client's total tax focus. We will give participants insight into the benefits of estate and wealth succession planning, income tax planning and family office services. Participants will understand the value of basic planning techniques and will be equipped to engage in high-level discussions with clients.

Marketing/Business Development

The Sales Chain and How It Can Derail Your Growth Efforts
Bob Lewis, The Visionary Group (BRN Member)
Add session to calendar

Every CPA firm struggles with having a limited number of professionals capable of developing business. The limited number of professionals who can bring in work is referred to as "impaired leverage." The sales chain will review every step in the selling process and will demonstrate where efforts can go wrong and how to prevent mistakes in new client prospecting, client mining and referral partner development. This session is specific to the CPA profession with suggestions on how to address the issue of "impaired leverage" inside a firm. You cannot expect a growth strategy to thrive if basic selling skills are not in place.

Industry

Real Estate Investor's Guide to Opportunity Zones/Property Tax and Credits & Incentives Opportunities
BDO USA, LLP
Add session to calendar

The Opportunity Zone program has created much excitement, and experts are predicting over $100 billion of investment will be invested in underserved communities. While the tax incentives are attractive, real estate investors should evaluate each deal based on its fundamentals. The first part of this session will provide an overview of the program, review how to mitigate risk when investing in opportunity funds, and analyze the effects of Opportunity Zones on the broader real estate market. The second part will focus on common misconceptions about property tax, opportunities to minimize property tax liabilities by identifying improvements, opportunities to generate significant credits and incentives, and the most significant credits and incentives opportunities available in specific states.

Advisory

Build or Buy? Choices for Alliance Firms in Creating an Outsourcing Practice
(session runs from 11:45-12:45 PM)
BDO USA, LLP
Add session to calendar

This session will discuss the key components required to build a successful outsourcing practice, including the basic components, what your client will expect in service delivery, sources of components to "help" and "build your own," and the use of BDO*Drive* as a turnkey alternative.

Managing an Accounting Practice (MAP)

Build Your Legacy Now
John Fenton, John J. Fenton Executive Coaching (BRN Member)
Add session to calendar

This session will cover the 8 Principles of Successful Company Culture and how you can enjoy success in creating your legacy by your design.

Emerging Leaders

Workplace Creativity and Innovation
Infopro Learning, Inc. (BRN Member)
Add session to calendar

This workshop offers a highly interactive approach to defining, practicing and applying innovative thinking. By experiencing an experiential exercise, participants will embrace a new perspective of the contribution of innovation in getting work done more effectively and efficiently. One of the biggest barriers to innovation is the fear of failure. This program explores excusable and inexcusable failures, and what managers can do to overcome these barriers and become failure tolerant. Participants will review strategies to create a culture of innovation and steps they can take to implement that culture back in their offices.

Human Resources

What Did You Say? Ensuring Accountability in Our Conversations
Heather Kinzie, The STRIVE Group, LLC (Alliance Learning Vendor Program)
Add session to calendar

This session will review different types of communication, how to pick up on communication cues, and listening and building trust through communication.

WEDNESDAY, MAY 20
1:30 – 2:30 PM

Accounting & Auditing

Business Combinations: Practice Issues
BDO USA, LLP
Add session to calendar

Even though there has been little standard setting in this area for some time, business combinations still create numerous practice issues. This session will describe practice issues in business combinations.

Using Global BDO Member Firms on International Assurance Engagements
Add session to calendar
BDO USA, LLP

In this session, the BDO Global Offerings and Support Services group will cover various aspects of collaborating with BDO Member Firms on international assurance engagements.

Tax

Accounting Method Issues Arising from Transactions
BDO USA, LLP
Add session to calendar

This session provides a high-level overview of the impact of taxable stock and asset acquisitions and tax-free transfers on a company's accounting methods. Topics discussed include adoption vs. carryover of new methods, assumption of deferred revenue liabilities, Section 381 transactions and transaction costs.

Small Business Taxpayer Accounting Method Changes
BDO USA, LLP
Add session to calendar

This session presents opportunities for small business taxpayers with gross receipts of $25 million or less related to tax reform's simplifying provisions. A discussion will cover what to consider when applying the gross receipts test, and the specific favorable accounting methods available for taxpayers that qualify.

Marketing/Business Development

Building the Partner Pipeline: Weaving a Business Development and Marketing Culture into Your Firm's DNA
BDO USA, LLP
Add session to calendar

As our profession expects to lose many of its entrepreneurial rainmakers to retirement in the coming years, more firms are focused on embedding "true business development acumen" into their DNA. Sustainability depends on leadership's ability to build a professional pipeline that can source new leads and opportunities, close new engagements, and in some cases build entirely new practices. Join us to hear best practices and a tangible process for creating a business development and marketing culture within your firm that will drive employee engagement and excitement around firm growth.

Industry

Dealership Industry
Rex Collins, HBK CPAs and Consultants (CPA Member)
Add session to calendar

This session will cover current events, hot topics and trends within the auto dealership industry.

Advisory

Real Estate: Bricks and Sticks of Real Property Valuation for Estate Taxation
BDO USA, LLP
Add session to calendar

Estate tax returns have some of the highest rates of audit. Learn what the IRS requires when establishing the value of real estate assets and the value of entities that hold real estate assets.

Topics covered include: timing of appraisal dates, change in basis for trusts, how depreciation works and pitfalls of accelerated depreciation, how the IRS defines a "qualified appraiser," what happens when the IRS challenges values, proper support for partial interest (DLOM and DLOC) discounts, and avoiding violations of IRC §6695A substantial and gross valuation misstatements.

Human Resources

Competency-Based Interviewing Techniques
BDO USA, LLP
Add session to calendar

This session will review how to standardize the interview process throughout your firm to offer a consistent and more in-depth candidate interview experience.

WEDNESDAY, MAY 20
2:45 – 3:45 PM

Accounting & Auditing

ERISA Update (Including SAS 136)
BDO USA, LLP
Add session to calendar

This session will discuss developments in Employee Benefit Plans, including recent DOL activity, quality control findings and recent standards setting activity.

Tax

Corporate Tax: Exit Planning Strategies for Businesses
BDO USA, LLP
Add session to calendar

Exit planning strategies are integral in maximizing the value for entities and benefits to owners. This session will review tax efficient exit strategies for corporations, including asset acquisitions; F reorganizations; stock sales, including a discussion of the impact to both buyers and sellers when Section 338(h)(10) and Section 336(e) elections are made; basic partnership acquisition structures; leveraged employee stock ownership plans (ESOPs); and taxable and tax-free management rollovers. The use of the installment method to defer taxation on escrows, earn-outs and seller financed notes will also be discussed.

SALT Income Tax Legislative and Judicial Update
BDO USA, LLP
Add session to calendar

Each state is incorporating the Tax Cuts and Jobs Act (TCJA) provisions differently, which is causing many state tax compliance challenges. We will discuss how states conform to TCJA, demonstrate how to navigate to the tools on BDO's Tax Knowledge Base that provide a summary of each state's treatment of TCJA, and highlight value-added planning opportunities.

Marketing/Business Development

Client Opportunity Plans: Growing your Firm Through Existing Clients
Becca Davis, Rea & Associates, Inc. (CPA Member)
Add session to calendar

During times of uncertainty, offering multiple services to your clients will help solidify and strengthen those relationships and reduce client turnover. But how do you systematically identify and pursue opportunities with your clients? In this session, you will get a look at Rea & Associates' "Client Opportunity Plan" process and learn how to implement something similar in your firm. We'll discuss how to track and manage these opportunities and how marketing can get involved to help move them through the sales cycle, as well as accountability measures you might want to consider putting in place.

Industry

The Evolution of Serving a Manufacturing Client in Today's Environment
BDO USA, LLP
Add session to calendar

During this session, we will present BDO's Manufacturing strategy for FY20 and beyond, detailing our learning and development curriculum, ecosystem framework and partnerships, research and insights approach for business development, and innovation lab strategy. In addition to learning how to leverage our strategy, attendees will hear BDO on top trends in the industry and how to best serve clients in an ever-changing environment.

Managing an Accounting Practice (MAP)

Protect Your Bottom Line: Learn Tools You Can Use at the Contracting Stage to Protect Yourself Financially
Jennifer Doll, Globalization Partners
(Alliance Vendor Marketing Program)
Add session to calendar

This session provides information on planning for legal risk and litigation, such as contract tools and insurance coverage for minimizing financial exposure. This would cover things like insurance coverages, cash flow considerations for defending litigation, and how contract clauses such as indemnities and liability caps can be used to reduce risk.

What the Heck is EOS?
David King, BMSS, LLC (CPA Member)
Add session to calendar

EOS (Entrepreneurial Operating System) has had a tremendous impact on the success of BMSS, LLC since being implemented in the firm in 2015. This session will provide an overview of the EOS Model that is explained in the book *Traction*. We will discuss our implementation journey and offer insights into how to implement EOS in a CPA firm, as well as how you can help your clients implement EOS.

Emerging Leaders

Unlocking Your Team's Potential
Infopro Learning, Inc. (BRN Member)
Add session to calendar

Leaders need opportunities to practice and apply proven techniques to unlock each team member's potential in ways that strengthen diverse teams and the firm itself. The focus of this session is on leaders creating a culture that encourages and rewards achievements by unlocking everyone's potential. Leaders learn how employee engagement impacts a firm's bottom line and the importance of their role in engaging every team member. We will reflect a "bias for action" that focuses on identifying signals of disengaged employees, addressing generational and cultural differences, deploying motivational strategies and considering the team's performance while still focusing on each individual's needs.

THURSDAY, MAY 21
11:00 – 12:00 PM

General Session
Tom Hood, Maryland Association of CPAs and Business Learning Institute
Add session to calendar

Tom Hood, CEO of the Maryland Association of CPAs and Business Learning Institute, will be our closing speaker on Thursday. Against the backdrop of change and uncertainty, there's an immediate need for the CPA firm leader to evolve and adapt. The megatrends of technology, demographics, regulations and standards are driving massive changes in the way CPA firms work. Tom will offer tips and techniques to manage the present and future, redefining excellence in the ways we harness exponentials and adopt an exponential mindset.

THURSDAY, MAY 21
12:15 – 1:45 PM

Accounting & Auditing

Audit Committee Communications and CAMs: Enhancing Value-Added Insights
BDO USA, LLP
Add session to calendar

Recognizing the important role that audit committees and those charged with governance play in ensuring integrity of financial reporting, we will discuss how to ensure you are delivering compliant required communications focused on significant risk while adding additional value and strengthening relationships. This session will share better practices, tools and resources auditors of both private and public companies can leverage in their discussions with audit committees and related documentation. Additionally, we will outline how communications with audit committees are considered for public companies who are currently going through Critical Audit Matter dry runs.

Independence Update
BDO USA, LLP
Add session to calendar

This session will cover developments and reminders in the areas of ethics and independence.

Tax

S Corporations: Commonly Encountered Issues
BDO USA, LLP
Add session to calendar

Important issues affecting S corporations have surfaced in the first year of tax reform implementation. This session compiles some of the most commonly encountered issues, including statutory amendments unique to S corporations, and provides new insights into Section 199A and 163(j). Section 965—transition tax provisions and Section 336(e) elections will also be discussed.

Tax Practice Leaders Meeting
Target Audience: Tax Practice Leaders and Tax Specialty Firm Members of BRN
Add session to calendar

This session is for tax practice leaders and will include a BDO national tax panel on innovative tax planning, as well as panel discussions on tax transformation and building a private client services practice.

Marketing/Business Development

Business Development/Marketing Group Meeting
Add session to calendar

This session for marketing and business development professionals, and those with an interest in these areas, will include presentations from The Growth Partnership on the marketer of the future and how to elevate that role to be seen as a catalyst for growth. We'll also hear from Boomer Consulting on how to proactively position your firm's brand to grow your service offerings and accelerate your success. Finally, BDO's National Director of Relationship & Account Management will speak on BDO's focus on exceptional client experience and takeaways for Alliance firms.

Advisory

Business Analytics
BDO USA, LLP
Add session to calendar

This session will offer a business case study on modeling that includes an evaluation of economic incentives (tax credits and abatement), access to labor and cost of labor considerations, the regulatory environment, and access to infrastructure and facility-related costs.

Managing an Accounting Practice (MAP)

Pulse of the Managing Partner
BDO USA, LLP
Add session to calendar

Whether you are a managing partner, partner or aspiring partner, you'll benefit from hearing the perspectives of a panel of Managing Partners representing small, medium and large Alliance firms.We will distribute the results of an updated survey related to MAP topics.

Emerging Leaders

Master the Art of Time Management
BDO USA, LLP
Add session to calendar

Time management skills are essential for professional success. Those who are able to successfully implement time management strategies are able to control their workload rather than spend each day in a frenzy, reacting to crisis after crisis—stress declines and personal productivity soars! These highly effective individuals are able to focus on the tasks with the greatest impact to them and their organization. This Time Management workshop will cover strategies to help participants apply these crucial strategies in their own daily whirlwind.

THURSDAY, MAY 21
2:00 – 3:30 PM

Accounting & Auditing

Assurance Practice Leaders Meeting
Target Audience: A&A Practice Leaders
Add session to calendar

This session is for assurance and audit practice leaders and will focus on best practices, challenges and innovative ideas in running efficient audit practices.

IAASB Quality Control Standards and Compliance Programs
BDO USA, LLP
Add session to calendar

This session will cover firms' responsibilities under the Department of Justice's April 2019 release of "Evaluation of Corporate Compliance Programs" and strategies for complying with the IAASB's new quality control standards.

Nonprofit Accounting Update
BDO USA, LLP
Add session to calendar

This session will deliver an overview of the Accounting Standards that have been issued by the Financial Accounting Standards Board and a status report on current projects relevant to the nonprofit sector.

Tax

Reviewing Partnership Tax Returns & Considerations Resulting from Prior Year Errors
BDO USA, LLP
Add session to calendar

This session will provide insight into reviewing complex partnership allocations as well as significant issues that arise from prior year reporting errors and how to properly correct them. A complex partnership agreement involving a multitier targeted allocation will be analyzed and the new disclosure requirements for Schedule K-1 will be discussed.

Indirect Tax Automation in a Post-*Wayfair* World
BDO USA, LLP
Add session to calendar

In a post-*Wayfair* world, the reality of a need for software solutions has come to the forefront. Companies cannot effectively comply with all the different state and local laws and rates in a manual environment. Now with COVID-19 pushing more companies to direct shipment to end users, the needs of companies are escalating. We will discuss the different software products on the market, the implementation process and issues that can occur, and how we can help you guide your clients during this time.

Industry

ESOPs and Contractors: A Savvy Business Succession Strategy
Construction Accounting Network (CAN)
Add session to calendar

For business owners, selling their company to employees through an ESOP can be an attractive alternative to other sale options. ESOPs have become especially popular in the contractor industry, allowing the company to remain independent, reward employees with ownership, and capitalize on tax incentives available to ESOP-owned companies.

Other

Professional Ethics Update
Jeanne H. Yamamura, CPA, MIM, PhD
Add session to calendar

This course provides busy CPAs with an overview of recent changes in ethical standards and a review of common regulatory violations. Inclusion of the latest issuances and coverage of ethical violations ensure that the most important issues affecting practitioners will be discussed. Participants will have an opportunity to test their recall of common ethical requirements. The focus is practical application—not just a dry recitation of the rules!

Managing an Accounting Practice (MAP)

CPA M&A: How to Find and Close the Right Deals
Bob Lewis, The Visionary Group (BRN Member)
Add session to calendar

Deals are being sourced, negotiated and closed much differently than ever. Firms are looking at mergers or acquisitions with fresh perspectives. Do not fall into the trap of waiting for a deal to come to you. There are unique opportunities to acquire talent, niches and new locations. Whether you are acquiring or need an exit strategy, discover how to systemize an M&A strategy and what risk or upside factors to consider when conducting these deals. Aging partner groups, succession talent with an unclear path to partnership, undefined buy-in processes, and exiting partner concerns of the succession team's ability to make buyout payments are fueling CPA M&A. Our team will review what merger partners look for, deal financials, how to approach initial merger talks, and how to view deals differently.

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