

RETHINK SUCCESS

A New Mindset for Sustainable Business

2021 BDO USA, LLP VIRTUAL CONFERENCE

NOVEMBER 16, 2021



Welcome to Our Virtual Forum

Please join BDO Leaders and Keynote Speakers for our second annual virtual BDO USA Conference, **Rethink Success: A New Mindset for Sustainable Business** - a forum for business leaders to share and discuss insights as we explore strategies and ideas that are shaping the current and future business landscape.

Topics will include:

- ▶ Economic and M&A outlook
- ▶ Tax reform
- ▶ Employee engagement, workplace solutions, and virtual global workforce
- ▶ Global supply chain
- ▶ Digital acceleration
- ▶ ESG disclosure and reporting
- ▶ Leading with purpose
- ▶ Sustainable business strategies, and more

WHY ATTEND?

- ▶ This 1-day virtual event combines general sessions with topical breakouts focused on the issues that matter most as leaders and organizations continue to navigate the rapid evolution of today's new business environment. Companies must assess, adapt, and act to thrive and leaders must rethink strategies, policies, and initiatives while rewriting the employee and consumer experience for sustainable business success.
- ▶ Live Q&A with BDO leaders and special guests during each session.
- ▶ Attendees can earn up to **6 CPE credits** in various fields of study.

WHO SHOULD ATTEND?

The online program will appeal to a variety of C-Suite and technical, finance, human resource, and business professionals. We welcome BDO clients and invited guests to experience the valuable insights and business issue updates.

STAY CONNECTED WITH BDO USA, LLP



Registration Information

- ▶ Registration prior to the start of the conference is required to gain access to the online platform.
- ▶ The following pages showcase our agenda, including session times, overviews, and CPE credits and fields of study. In addition to joining our Keynote and General Sessions, you may select breakout sessions most relevant to you and your team or organization.
- ▶ Customize your agenda in advance and save session selections to your Outlook calendar using the links provided. Or log in during the conference and build your agenda as you go. Your selections may be made up until the start of each session.
- ▶ We spaced session start times to allow for periodic breaks and will begin and end each session promptly as scheduled.

Please note that CPE credit is estimated to be 1.0 credit for each 50-minute session. CPE credit is not available for the welcome and opening remarks.

SCHEDULE OF EVENTS

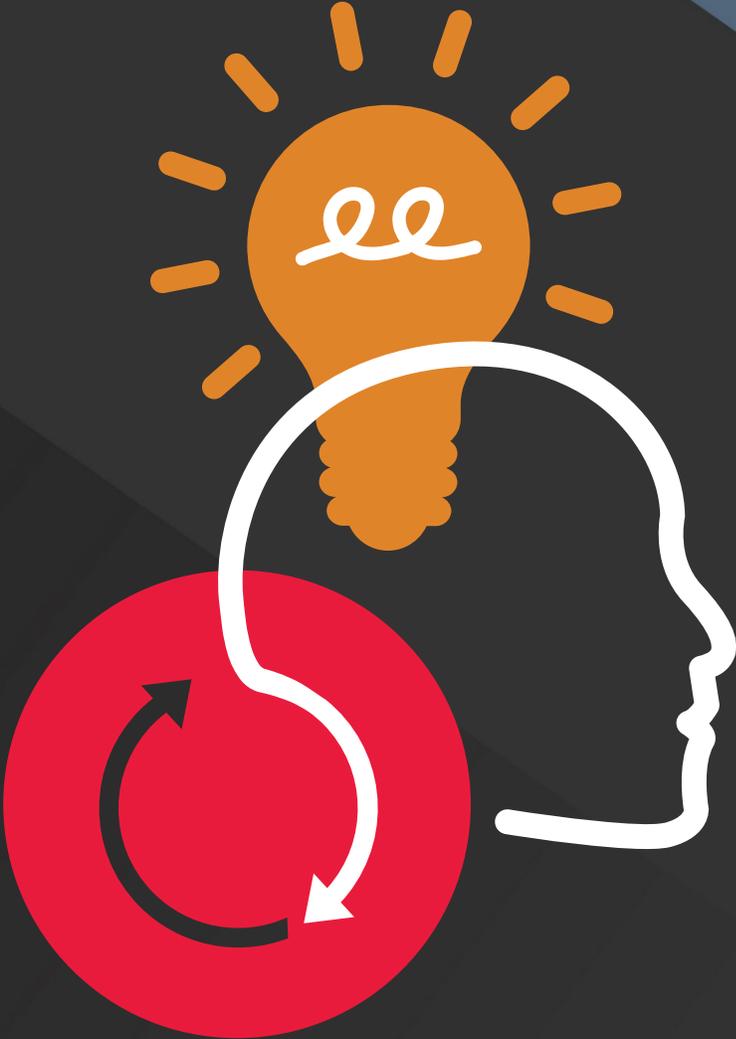
Please note all times listed in this brochure are in Eastern Time (ET).

TUESDAY, NOVEMBER 16

9:00 am - 11:00 am	Virtual Conference Center Opens
11:05 am - 11:15 am	Opening Remarks
11:15 am - 12:05 pm	Keynote: General Session
12:15 pm - 1:05 pm	Panel: General Session
1:05 pm - 1:30 pm	Break
1:30 pm - 2:20 pm	Topical Breakouts Round 1
2:30 pm - 3:20 pm	Topical Breakouts Round 2
3:30 pm - 4:20 pm	Topical Breakouts Round 3
4:30 pm - 5:20 pm	Keynote: General Session
5:20 pm - 5:30 pm	Closing



Detailed
Agenda



Welcome and General Sessions

Tuesday, November 16

11:05 - 11:15 AM Eastern Time

Welcome and Opening Remarks: The Future of Business is Sustainable Business

[ADD SESSION TO CALENDAR](#)

In recent years, doing well by doing good was a strategy leaders could pursue to be better - better employers, better community stewards, better businesses. Today, a fundamental shift is underway. We now know that doing good is not good enough. Today, the strategy leaders must pursue to ensure long-term, sustainable success has evolved to be more holistic, integrated and interdependent. Join BDO USA CEO Wayne Berson in kicking off our virtual event as he discusses how the middle market is adapting to this realignment. Wayne will also highlight the business issues, emerging trends and insights BDO leaders and guests will explore throughout the day.

Non-CPE Session

11:15 AM - 12:05 PM Eastern Time

Market Outlook 2022

[ADD SESSION TO CALENDAR](#)

Join Jay Duke, BDO National Managing Partner Advisory with Keynote Speaker, Brian Belski, Chief Investment Strategist, BMO Capital Markets, as they discuss the 2022 market outlook and settling into the new normal. Sharing the latest trends in the M&A and debt and equity capital markets, Brian will discuss current market statistics and trends to provide an outlook for the capital markets.

After this program attendees will be able to:

- ▶ Understand how the pandemic continues to impact the nation's market outlook
- ▶ Identify key market drivers of growth and capital market opportunity
- ▶ Identify the trends and outlook for markets

CPE 1.0 Credit / Field of Study: Technical EC, Economics

12:15 - 1:05 PM Eastern Time

The ESG Imperative: Strategies for Sustainability

[ADD SESSION TO CALENDAR](#)

Of the factors changing the business landscape, the fundamental shift in mindset occurring around the convergence of environmental, social and governance (ESG) issues is rising to center stage. ESG is at the forefront for organizations of all types and their diverse set of stakeholders. Businesses and their leadership teams are expected to have positions on ESG-related issues and be the drivers of change. There has never been a more critical time to prioritize ESG as a strategy for building a sustainable business and future for all.

Join moderator Christopher D. Tower and panelists from BDO's ESG Center of Excellence while they discuss the U.S. ESG landscape and key considerations for businesses in navigating their ESG and related reporting journeys.

After this program attendees will be able to:

- ▶ Summarize why and how sustainability is impacting corporate behaviors and business models in today's business world
- ▶ Identify primary drivers, pressures and opportunities for advancing ESG strategy and related reporting
- ▶ Conduct insightful conversations with management and boards regarding what to consider when launching the ESG journey

CPE 1.0 Credit / Field of Study: Technical SK, Specialized Knowledge

Topical Breakouts

Tuesday, November 16

1:30 - 2:20 PM Eastern Time

Rethink the Workplace - Breakouts Round 1

Breakout Option #1 - Redefining the Workplace

ADD SESSION TO CALENDAR

Today, the physical “place” where work is done is just one of several factors that companies must consider as part of a holistic workplace strategy. Organizations are now faced with the unique opportunity to reimagine the way work is done – and the implications go far beyond the office. From digital enablement and process redesign to support a hybrid workforce, to reevaluating real estate strategies and potential operational risks, redefining the old “workplace” is an enterprise-wide transformation effort closely intertwined with the organizational operating model. To successfully build the next generation workplace, companies must consider how key elements of their strategies work together and prioritize organizational alignment.

After this program participants will be able to:

- ▶ Describe the key foundational elements of a successful reimaged workplace strategy
- ▶ Understand the relationship between the organizational operating model and workplace strategy in planning and in practice
- ▶ Discuss the workforce’s influence on a reimaged workplace strategy
- ▶ Describe the important role of an operational risk program in workplace strategy

CPE 1.0 Credit / Field of Study: Non-technical BMO, Business Management & Organization

Breakout Option #2 - The Global Virtual Workforce

ADD SESSION TO CALENDAR

The pandemic-prompted shift to remote work environments has opened new doors, both for talent and organizations, that are no longer limited by geography when it comes to employment. Workers can truly work from anywhere, and companies can source the brightest and best talent regardless of where those workers call home. But the globalization of the workforce comes with many considerations - from tax nexus implications and compliance considerations, to employee recruitment and retention, to international data privacy.

After this program participants will be able to:

- ▶ Explain the tax and people implications of remote work
- ▶ Describe data protection (privacy and security) obligations and considerations related to remote workers
- ▶ Develop a remote worker policy to help mitigate risk
- ▶ Discuss shifts in the labor market and the impetus for flexible work arrangements

CPE 1.0 Credit / Field of Study: Technical TX, Taxes

Topical Breakouts

Tuesday, November 16

2:30 - 3:20 PM Eastern Time

Rethink Systems, Investments, and Consumer Consumption - Breakouts Round 2

Breakout Option #1 - Rethinking Your Global Supply Chain: Understanding How Global Economic Shifts Impact Supply Chains

[ADD SESSION TO CALENDAR](#)

The economic disruptions over the last few years - none more so than the past 18 months - have significantly impacted international trade, and by default global supply chains. The challenges for US-based and multinational companies are broad and sweeping. What will be the likely evolution of supply chains and international trade in the medium to long term? In this session, hear from BDO tax and supply chain professionals who will break down these international trade complexities, detail what they mean for companies across the globe and offer strategies to navigate this ever-changing landscape.

After this program participants will be able to:

- ▶ Describe global economic shifts and policies in play that have impacted supply chains across the world
- ▶ Explain the evolution of supply chains and international trade as a result of the COVID-19 pandemic
- ▶ Illustrate the tax and supply chain demand implications brought on by these economic shifts

CPE 1.0 Credit / Field of Study: Technical EC, Economics

Breakout Option #2 - 2021 M&A Trends: Setting the Stage for 2022 Activity

[ADD SESSION TO CALENDAR](#)

Join members of our deal advisory team as they talk about the overarching M&A landscape amidst a broader economic backdrop before taking a deeper dive into the day-to-day of current M&A processes and tax considerations. The presenters will discuss themes and trends that have developed recently or since the onset of the pandemic, provide key considerations for acquirers and sellers in an overactive M&A market, and discuss implications for M&A activity heading into 2022.

After this program participants will be able to:

- ▶ Discuss the capital markets and broader economic forces behind the scenes of the current frenetic deal making environment
- ▶ Provide perspective on the way the due diligence and deal processes are changing to keep pace with record-breaking M&A demand
- ▶ Review M&A-related tax considerations, including growing trends as well as best practices for both acquirers and sellers

CPE 1.0 Credit / Field of Study: Technical FI, Finance

Breakout Option #3 - Digital Accelerated: Innovating Now for What's Next

[ADD SESSION TO CALENDAR](#)

Since the start of COVID-19, most businesses have been scrambling to keep up with the pace of change, driving the accelerated demand for digital services. Now, business executives and technology leaders are focused on maintaining momentum and ensuring they are positioned to capture growth opportunities - but where should they begin?

BDO's [2021 Digital Transformation Survey](#) polled 500 C-level executives to gauge their digital readiness and plans for the future. We will take a closer look at the major trends and initiatives companies are placing their big bets on for their future, including:

- ▶ Why tech leaders are accelerating digital transformation plans
- ▶ Inside-out trends that companies are embracing to help optimize performance
- ▶ Outside-in digital innovations that are igniting growth and meeting customer demands

After this program participants will be able to:

- ▶ Describe 5 key digital trends executives have identified as priorities
- ▶ Pinpoint specific initiatives to optimize operational performance
- ▶ Identify areas to increase market demand, channel performance, and sales production

CPE 1.0 Credit / Field of Study: Technical IT, Information Technology

Topical Breakouts

Tuesday, November 16

3:30 - 4:20 PM Eastern Time

Strategies for Building a Sustainable Business - Breakouts Round 3

Breakout Option #1 - Tax as a Sustainable Business Strategy

[ADD SESSION TO CALENDAR](#)

From global disruption to economic uncertainty, businesses are in a constant state of change. The interplay between business decisions and tax implications has never been more prominent and having an understanding of these complexities plays an integral role in building a sustainable business strategy. With increasing demands for tax transparency, how can businesses be prepared? In this session, BDO's tax leaders will highlight legislative updates impacting businesses in the U.S. and around the world, discuss proposed changes on the horizon, and explain how to plan for the future.

After this program participants will be able to:

- ▶ Describe potential federal tax reform and global tax policies that may impact U.S. corporations and multinational enterprises
- ▶ Discuss how a total tax strategy can enable better decision-making and mitigate long-term risk
- ▶ Explain the role of tax in the ESG agenda and the importance of total tax liability measurement

CPE 1.0 Credit / Field of Study: Technical TX, Taxes

Breakout Option #2 - Rethink Data-Driven Business Strategies

[ADD SESSION TO CALENDAR](#)

COVID-19 gave us the opportunity to rethink everything. Data strategies provide great upside beyond reporting and dashboards. We are now talking about data monetization, predictions, artificial intelligence, and transforming the way we do business around the data that we, as organizations, have. This session will highlight examples of where we've seen clients explore more than just insights; instead, we'll highlight where we've seen businesses use advanced technologies, drones, robot dogs, and computer vision.

After this program participants will be able to:

- ▶ Recognize how data is helping organizations redesign their business
- ▶ Examine attainable advanced data technology and how to use it
- ▶ Analyze use cases where the need went above and beyond reporting and dashboards

CPE 1.0 Credit / Field of Study: Technical IT, Information Technology

Breakout Option #3 - The Evolving ESG Disclosure and Reporting Landscape

[ADD SESSION TO CALENDAR](#)

Most companies are experiencing mounting pressure to focus on ESG issues in addressing increasing expectations from broad stakeholders for decision-useful disclosures about the creation of long-term sustainable value. Within a domestic and global ESG reporting landscape - complicated by disparate reporting frameworks and standards and the fact that many ESG objectives and goals are not consistently defined and quantifiable - management teams and boards are faced with significant decision points within this journey.

Join us for an informative session discussing key considerations for US-based organizations with respect to the what, how and where to report on ESG and what the future may hold with respect to the integration of non-financial and financial reporting.

After this program participants will be able to:

- ▶ Describe the drivers impacting the ESG reporting landscape and varied stakeholder expectations for what to be reporting
- ▶ Recognize considerations in how to report on identified ESG goals and objectives and the progress being made in satisfying those goals and objectives
- ▶ Identify the appropriate vehicles for reporting on ESG strategies and execution
- ▶ Understand the growing advantage and need for assurance over ESG disclosures

CPE 1.0 Credit / Field of Study: Technical SK, Specialized Knowledge

Keynote General Session

Tuesday, November 16

4:30 - 5:20 PM Eastern Time

Rethink the Future of Business: Powered by Purpose

[ADD SESSION TO CALENDAR](#)

The most successful, and the most sustainable, businesses have a common trait - a clear understanding of their purpose and an ability to articulate that purpose to their people, their customers and other key stakeholders.

Keynote speaker Haley Rushing - co-founder and chief purposologist of The Purpose Institute and co-author of the Wall St. Journal bestseller, "It's Not What You Sell, It's What You Stand For" - will talk through why it is so critical that companies have a clearly defined and articulated purpose. She will also walk through how it has benefited some of the most significant brands in business today. To conclude the presentation, Haley will be joined by Cathy Moy, BDO's chief people officer, for a candid conversation about purpose in the workplace

After this program participants will be able to:

- ▶ Answer the question "Why does purpose matter in business?"
- ▶ Share an example of how a company used purpose to navigate a complex challenge
- ▶ Know how to communicate, cultivate, and celebrate your Purpose to inspire employee engagement

CPE 1.0 Credit / Field of Study: Non-Technical PD, Personal Development (Leadership)



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