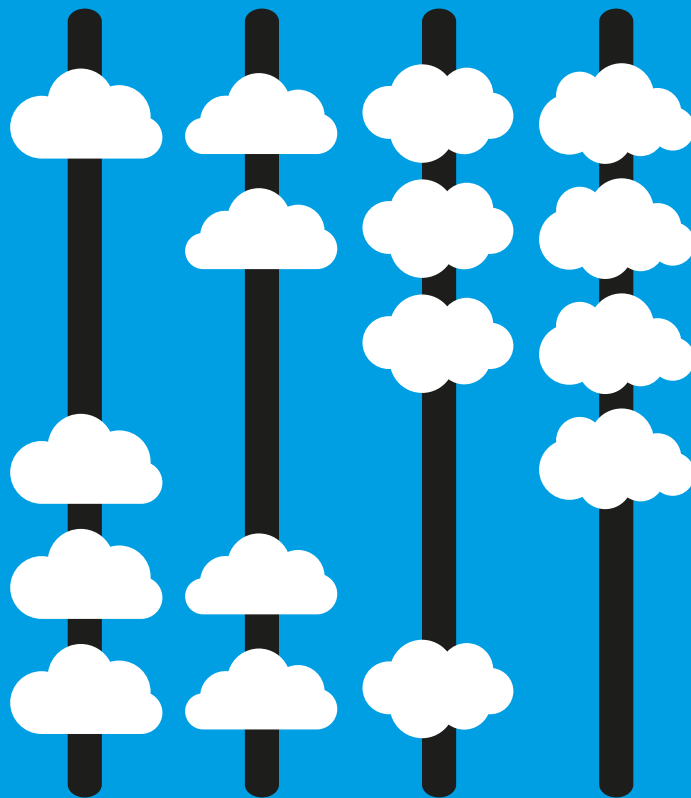


accounting & FINANCE SHOW

July 11-12 2018, Javits Center, New York, NY



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ON THE DIGITAL INNOVATION THAT IS SWEEPING
ACCOUNTING & FINANCE - ARE YOU READY?

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OUR STORY

Digital technology is revolutionizing accounting and financial management. Cloud accounting and a plethora of new applications, software and services are giving accountants, bookkeepers and finance managers a powerful range of value-adding tools.

But many accountants are feeling left behind by the pace of change and uncertain about their future in an increasingly automated world. The **Accounting & Finance Show New York** will empower CPAs both new and old to embrace digital transformation, develop new skills and stay ahead of the technology curve.

We're bringing **6** targeted conference streams to an ambitious audience hungry to learn, network and innovate. These streams include:

- Technology
- Tax Management
- Wealth Management
- Practice Management
- Funding, Bookkeeping & Payroll
- Finance Director's Summit

Our **200+ expert speakers** come from every size of accounting practice and every walk of life – from Jamila Abston, Partner at **Ernst & Young** to Jody Padar, author of **The Radical CPA**; and from Kelvin Joseph, CMO of **Steiner Sports** to Ashok Rajan, **Janney Montgomery Scott's** VP of Investments.

If you're looking for networking, discussion, debate and free CPE with thousands of like-minded peers, this is the only New York City event for you.

We can't wait to welcome you to the Javits Center next July!



AIDAN BRAIN
Head of Conference Production
Terrapinn USA

aidan.brain@terrapinn.com



Our keynote speaker **Kelvin Joseph** typifies the ambitious, upwardly mobile CPA experience. After studying public accounting at PACE, Kelvin worked at **Ernst & Young** before becoming **Steiner Sports'** CFO less than a decade after graduating. Now he's COO and CMO of one of America's biggest sports marketing agencies.

KEY SPEAKERS



TECHNOLOGY

Mark Li, Cryptocurrency/Blockchain/
Bitcoin Leader, **Burr Pilger Mayer**

Leading expert on blockchain,
cryptocurrency and all things future-
facing



BOOKKEEPING & PAYROLL

Stacy Kildal, Founder, **Kildal Services**

QuickBooks guru with her own dedicated
following across the bookkeeping
community



FINANCE DIRECTORS SUMMIT:

Jody Padar, Author, **The Radical CPA**

Author, CEO, consultant and renowned
visionary



TAX MANAGEMENT:

Jamila Abston, Partner, **Ernst &
Young**

Manager before the age of 27 and
partner by the age of 35



WEALTH MANAGEMENT:

Ashok Rajan, V.P. Investments,
Janney Montgomery Scott

28-year Wall Street practitioner
frequently invited on Bloomberg, CNBC
and CNN



PRACTICE MANAGEMENT:

Drew Carrick, Senior Consultant,
Grant Thornton

Consultant and entertainment personality
– an accountant who raps!

200+ SPEAKERS INCLUDING:

KEYNOTES



Kelvin Joseph
CMO & COO
Steiner Sports



Caroline Ciralo
Former Acting
Assistant Attorney
General, Tax
Division
U.S. Department of
Justice

TECHNOLOGY THEATER



Mark Li
Cryptocurrency/
Blockchain/Bitcoin
Leader
Burr Pilger Mayer



Ranica Arrowsmith
Technology Editor
Accounting Today



Michael Pinna
IT Audit Manager
Buchbinder & Tunick



Gregory LaFollette
Strategic Advisor
CPA.com



Sean Stein Smith
Assistant Professor
Lehman College



Jasminda Brown
Senior Manager IT
Burr Pilger Mayer



Erik Weinapple
Tax Director
Burr Pilger Mayer



Byron Patrick
Managing Director
CPA Practice,
Network Alliance



Michael Jones
SVP Sales &
Partnerships
MBS Tax &
Accounting



Andrea Parness
CPA/Owner
A. Parness & Co.



Sanjiv Singh
Director, Fintech/
Blockchain Advisory
Group
KPMG



Elizabeth Adams
Digital Strategy
Leader
Links Advisory

FINANCE DIRECTORS SUMMIT



Jody Padar
Author
The Radical CPA



Jacquelyn Tracy
Founding Partner
Mandel & Tracy



Matthew Nissen
Finance Director
Verus Claims Service



Mark Zabel
Data Scientist/
Statistician
Verus Claims
Services



Richard Brand
CFO
BeyondSpring



Lindsay Stevenson
VP Finance
1st Financial Bank
USA



Jody Grunden
Co-Founder & CEO
Summit CPA Group

BOOKKEEPING & PAYROLL



Gail Perry
Editor-in-Chief
CPA Practice Advisor



Ann Dzurani
Professor of
Analytics &
Accountancy
Northern Illinois
University



Jennifer Templeman
COO
Jumpstart



Pete Badas
Managing Partner
Innovative Tax &
Accounting Group



Cindy Schroeder
Owner
Bright Bookkeeping



James Medeiros
Principal
CrossCountry
Consulting



Melissa Krumme Hooley
Partner, Employee
Benefits Plan
Anton Collins
Mitchell



Stacy Kildal
Founder
Kildal Services

WEALTH MANAGEMENT



John Napolitano
CEO
US Wealth
Management



Lester Wigler
Financial Advisor/
Senior Portfolio
Manager
Morgan Stanley



Hank Berkowitz
Managing Principal
HB Publishing



Alan Kahn
President
AJK Financial Group



Daniel Mazzola
Investment Advisor
American Portfolios



Matthew Rappaport
Tax Planning and
Structuring Attorney
Matthew E.
Rappaport, Esq



Gregory Matalon
Estate Litigation
Attorney
Capell, Barnett,
Matalon &
Schoenfeld



Rona Loshak
Founding Partner
Karp Loshak



Natalie Karp
Founding Partner
Karp Loshak



Karly Laughlin
Manager Tax, Small
Business
Belfint, Lyons &
Shuman



Ash Rajan
V.P. Investments
Janney Montgomery
Scott

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200+ SPEAKERS INCLUDING:

TAX MANAGEMENT



Justin Hopton
Senior Tax Associate
PwC



Michael Schidlow
Head of Financial
Crime Compliance
HSBC



Rich Lanza
Director, Data
Analytics
Grant Thornton



Deniz Appelbaum, PhD
Professor of
Accounting
Montclair State
University



Frances McKenna
Tax Director
Marks Paneth



Alexander Buchholz
Senior Audit
Manager
Senior Audit
Manager



Michael Young
Litigation Partner
Willkie Farr &
Gallagher



Mary-Jo Kranacher
ACFE Professor of
Fraud Examination
CUNY York College



Salvatore Collemi
Partner in Charge
Professional
Standards Group
Marks Paneth



Daniel Winters
International
& Bitcoin Tax
Compliance
Global Tax
Accountants



Mark L. Stone
CPA MST
Sales Tax Defense



Dennis Lormel
President
DML Associates
Consulting



Michael Dillon
President
Dillon Tax
Consulting



Edward Mendlowitz
CPA Partner
WithumSmith+Brown



John D'Amico
Director
Marks Paneth



Brian Gordon
Director of State &
Local Taxes
Gettry Marcus CPA



Brad Muniz
Partner
Sobel & Co.



Ryan Severino
Chief Economist
JLL



Robert Barnett
Tax Partner
Capell, Barnett,
Matalon &
Schoenfeld



Chris Hitzelberger
Managing Director
SourceHov Tax



Paresh Shah
CEO
PareShah Financial



Eli Uncyk
Partner
Kameran, Uncyk,
Soniker & Klein



Jennifer Ann Wynne
Tax Attorney
Tenenbaum Law



Karen Tenenbaum
Tax Attorney
Tenenbaum Law



Sibi Thomas
Partner, Non-Profit,
Government &
Healthcare
Marks Paneth



Jamila Abston
Partner
Ernst & Young

PRACTICE MANAGEMENT



Drew Carrick
Senior Consultant
Grant Thornton



Gary Boomer
CEO
Boomer Consulting



Garrett Wagner
Business Therapist
Thaney & Associates



Joanne L. DelBalso, EA
Owner, No Fuss
Accounting Services &
Be Socially Awesome



Bill Carlino
Managing Director
Transition Advisors



Jeremias Ramos
Editor-in-Chief
The Daily CPA



Paul Calabrese
Senior Manager
Rubino & Co



Sandi Leyva
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Accountants'
Accelerator



Melisa Galasso
Owner
Galasso Learning
Solutions



Glenn Eyrych
Partner
Calibre CPA Group



Jennifer Katrulya
Practice Leader
Entrepreneurial
Services
MarksNelson



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Mergers & Acquisitions
Specialty Consultant
Goldenberg
Consulting Group



Katie Tolin
Chief Growth Guide
CPA Growth Guides



Lauren Clemmer
Executive Director
Association
for Accounting
Marketing



Abby Eisenkraft
CEO
Choice Tax Solutions



Rebekah Brown
Manager
Maryland
Association of CPAs



Richard Kestenbaum
Partner
Triangle Capital



Bob Goldfarb
Principal
Janover LLC



Andrea Feinberg
President
Coaching Insights



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Nkrumah Pierre
Director, Business
Development &
Friends of the Firm
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AGENDA AT A GLANCE

DAY 1

Conference Day One – Wednesday July 11th

PLENARY KEYNOTES

8:00	Plenary Keynote Conversation: Automation, Hope and Fear: Seizing the Future for the Modern Accountant					
8:25	Plenary Keynote Address: From CPA to CEO: the new wave of entrepreneurial accountants					
8:50	<i>Title Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
	 TECHNOLOGY THEATER	 BOOKKEEPING AND PAYROLL THEATER	 FINANCE DIRECTOR'S SUMMIT	 TAX MANAGEMENT THEATER	 WEALTH MANAGEMENT THEATER	 PRACTICE MANAGEMENT THEATER
9:40	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
10:05	Automated accounting for 21st century business	How to add payroll to your CPA services	The CFO of the future: beyond the numbers	Regulatory roadblocks: equip your clients for change	Title	Principles of change management in accounting firms
10:30	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
10:55	Developing a digital strategy for success available	Navigating the minefield of payroll compliance	Driving business value as a finance director	Data and analytics in tax: the young professional's perspective	Becoming the 'trusted advisor'	Thinking like a start-up
11:20	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
11:45	PANEL: Women in accounting	The Radical HR Manager	Mapping the ideal CFO career trajectory	How tech can transform auditing	Asset management for accounting	Variables for valuing an accounting firm
12:10	TECHNOLOGY INNOVATION SHOWCASE <i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
12:35		Employee education: transmitting value	The Radical CFO	Analysis of tax changes to the ACA	Get ready for the new era in estate planning	The Anticipatory CPA: from crisis manager to opportunity manager
1:00	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
1:25		Payroll software: compare and contrast	Winning new business: tried-and-tested techniques	Thinking strategically with cost segregation	Radical Wealth Management	PANEL: Recruiting & retaining millennials
1:50	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
2:15	PANEL: Blockchain for accounting: the next agitator of change?	Working smart: how tech can revolutionize your day-to-day	Being a virtual CFO: is it possible? Is it desirable	Internal auditing: developing a workforce strategy for improved risk management	Robo-advisors: the future of wealth management?	PANEL: Marketing strategies for large practices
2:40	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
3:05	PANEL: Crypto-accounting in the business world	Effective time management for CPAs	Document management for small business	Accounting and auditing for non-profits	Marketing wealth management	Brand yourself: carving out a social media niche
3:30	<i>Platinum Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
4:20	Time to get radical: upending the traditional CPA model					
4:45	CEO Q&A: Leadership in accounting & technology – managing firms through disruption and innovation					
5:10	Networking Drinks Cocktail Party					







END OF CONFERENCE DAY ONE

AGENDA AT A GLANCE

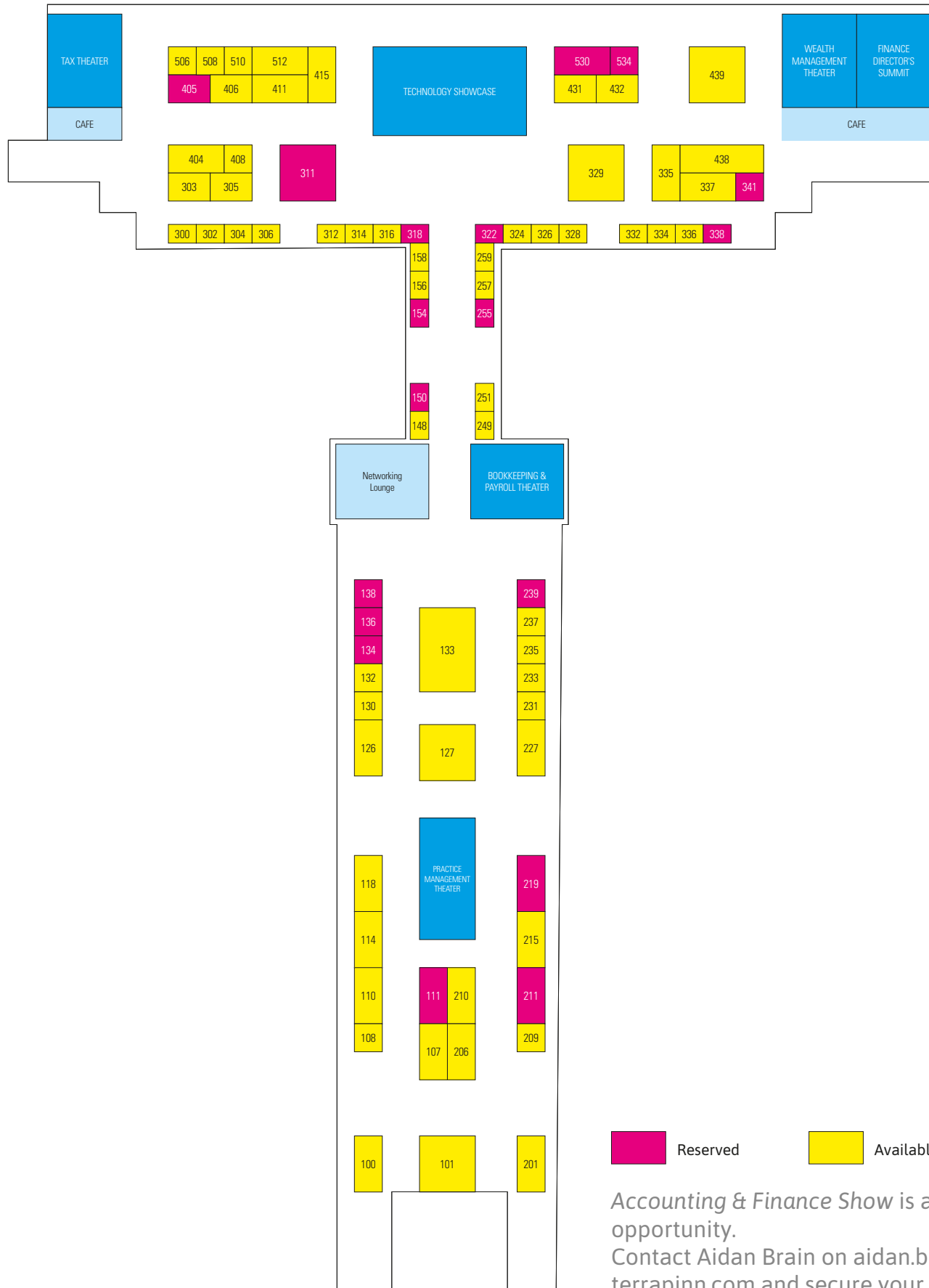
DAY 2

Conference Day Two – Thursday July 12th

PLENARY KEYNOTES

8:00	Plenary Keynote: A New Foundation for American Greatness? Analysis of the upcoming tax reform					
8:25	Plenary Keynote: Tax, the Good, the Bad and the Ugly					
9:15	<i>Platinum Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
	 TECHNOLOGY THEATER	 BOOKKEEPING AND PAYROLL THEATER	 FINANCE DIRECTOR'S SUMMIT	 TAX MANAGEMENT THEATER	 WEALTH MANAGEMENT THEATER	 PRACTICE MANAGEMENT THEATER
9:40t	TECHNOLOGY INNOVATION SHOWCASE	How HR leaders optimize workflow with technology	PANEL: Why finance directors should be tech evangelists	Analytics in tax planning	How Fintech is disrupting financial planning	Big data and analytics in practice management
10:05	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
10:30		Machine learning and OCR: data entry made simple	Grow your business with the next generation of advanced analytics and big data	Easing tax season workload compression	Wealth advisors in the face of tax reform and market pressures	OXFORD DEBATE: Value-based pricing vs hourly billing
10:55	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
11:20		Bridging the GAAP: implementing the new Lease Accounting Standard	Grow your business with the next generation of advanced analytics and big data	PANEL SESSION: Uncovering illicit financial activity	PANEL SESSION: Going it alone vs financial planning in a CPA firm	How to transform outreach strategies for new clients
11:45	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
12:10	Blockchain: Accounting tech of the future	Workflow solutions in tech	Cost management for CFOs: reduce spend without reducing growth	FASBs revenue recognition standards for non-profits	Life insurance industry trends and future outlook	PANEL: Diversity and inclusion in accounting
12:35	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
1:00	Digital change management: streamlining internal adoption	eCommerce accounting for the 21st century	Recruiting right: building your financial team	Stolen Identity Refund Fraud (SIRF) and how to identify it	Ethics in wealth management	Beyond compliance: Adding advisory services to your practice
1:25	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
1:50	Managing a business in the Cloud	How changes to revenue recognition will affect bookkeepers and accountants	Address cybersecurity vulnerability to protect your firm	Taxing the Cloud: Nexus and sales tax	Forensic accountancy for risk management	Increasing net worth and intrinsic value
2:15	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
2:40	PANEL SESSION: Cybersecurity in large firms	Workforce analytics: a new dimension to human capital management	IT infrastructure for maximum financial productivity	Enhancing the quality of your auditing process	Navigating the maze: Today's landscape of long term care	The customer-centric CPA: a focus on service and experience
3:05	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
3:30	OXFORD DEBATE: Will commoditization kill off accountancy?	Big data and analytics for bookkeeping	Securing funding for small businesses	Tackling fraud with technology	Auditing alternative investments	Succession planning for your practice
4:00	CONFERENCE ENDS					

FLOORPLAN



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