

Spring Splash Accounting Conference Schedule (Day One)

**This schedule is subject to change*

8:00 – 9:40am	
Cases and Rulings Course Description Coming Soon!	J. William Strickland
Accounting for Software Course Description Coming Soon!	Jaclyn Veno
Budgeting From the Bottom Up You send your clients their financial statements each month. Or you help them with a budget once a year. Then they never look at what you send them each month or know if they are below, meeting or exceeding their budget. Imagine turning those numbers into impactful graphs so they can see the trends and financial health of their company. This session helps you provide the same, meaningful information, in a form they can see and understand. You'll help them spot impending profitability, productivity, and cash flow issues so they can resolve them before those issues become crises.	Ruth King
8:05 – 9:45am	
Grant Writing with AI: A Strategic Tool for Nonprofits Course Description Coming Soon!	Schrendria Robinson
SC Tax Credits: Fundamentals for Strategic Tax Planning Using Historic, Abandoned Building, Textile Mill, and Affordable Housing credits Course Description Coming Soon!	Holly Strategier
BREAK	
10:00 – 10:50am	
Bueller, Bueller... Is Your Tax Strategy Playing Hooky? Trump Taxes, Tariffs & Transfer Pricing Update Course Description Coming Soon!	David Zaiken, Kathleen Holston, and Cheryl Leydon
Quality Management Standards - Year 1 Post-Implementation Tips Course Description Coming Soon!	Jennifer Louis
The Multigenerational Advantage: Building Stronger Teams for the Future Course Description Coming Soon!	Carlie Boese

10:05 – 10:55am**Common Issues in Contribution Accounting, Grants and Discounted Pledges**

Master the nuances of contribution accounting with this focused, fifty minute session designed for CPAs working with nonprofit organizations. This course explores common pitfalls in accounting for contributions, grants, and pledges, with practical insights grounded in current U.S. GAAP.

Participants will gain clarity on distinguishing conditional vs. unconditional contributions, the peculiarities of in-kinds, proper revenue recognition and the unique issues surrounding multi-year pledges. Through real-world examples and common error scenarios, this session equips you to avoid misstatements, strengthen compliance, and enhance audit readiness.

Whether you prepare, audit, or advise nonprofit financial statements, this course will sharpen your technical expertise and help you navigate one of the most judgment-heavy areas in nonprofit accounting with confidence.

AICPA Update  **Yellow Book 24**

Course Description Coming Soon!

Jackie McLaughlin

Jaclyn Veno

BREAK**11:10am – 12:30pm****Capital Gains Primer**

Course Description Coming Soon!

J. William Strickland

Evaluating the Reliability of Audit Evidence - Including Electronic Evidence & Use of AI

Course Description Coming Soon!

Jennifer Louis

Budgeting, Forecasting & Management Reporting in Industry

Course Description Coming Soon!

Diana M. Gentile

11:15am – 12:35pm**Financial Storytelling: Turning Numbers Into Mission Impact**

Course Description Coming Soon!

Schrendria Robinson

Sales Skills for CPAs and Accounting Professionals

“Nothing happens until somebody sells something!” During this fast-paced program you will learn how to sell more, and enjoy the process of doing so. Interested in shortening the sales cycle? Learn how during this session, as well as how to turn your strategic allies into a strategic sales force. Get creative on your marketing, and learn how to make every minute of every day work for you. In-person networking? No problem! Learn how to build rapport quicker. This program will help you organize your sales calls, and help to discern between selling an appointment and selling your services. What about social media, you ask? Yep, we will cover that too. Plus, your sales questions will be answered, your sales scenarios addressed, and you’ll even laugh. What could be better? You do not want to miss this program!

Doug Van Dyke

12:30 - 1:30pm | Lunch

1:30 – 3:10pm

State & Local Tax Trends to Watch in 2026

Course Description Coming Soon!

Dumb Financial Mistakes Your Clients Make and How to Help Avoid Them

In this lighthearted presentation I give you my top dumb mistakes that your business clients make all the time. I'll give you discussion suggestions on how they can avoid them in the future.

These mistakes include pricing, discounting, P&L and balance sheet issues, and cash flow issues. You'll discover the conversations to have so they have a more profitable business and build wealth.

These mistakes come from my book, *101 Dumb Financial Mistakes Business Owners Make and How to Avoid Them*.

No-Fluff AI: How To Find Time & Reduce Friction

Course Description Coming Soon!

Jeremy L. Migliara

Ruth King

Liz Peuster

1:35 – 3:15pm

Yellow Book & Single Audit Update Yellow Book 24

Course Description Coming Soon!

Presentation Skills and Public Speaking

Savvy CPAs and accounting professionals possess the ability to move groups of people. During this program you will learn the 20 best practices to embrace as a speaker and presenter. You will formalize your ability to prepare for important presentations. You will learn techniques that will help you manage an audience, as well as how to use your voice as an instrument. By the end of this session, you will know six key structures that can make your presentation easy to understand. In addition, you will enhance your ability to use humor and tell stories. This program is geared for CPAs and accountants who want to raise their bar of excellence and who thirst to make a positive difference in the lives of others!

Jennifer Louis

Doug Van Dyke

BREAK

3:30 – 4:40pm

From Business Sale to Inherited IRA: Tax Strategies for High-Net-Worth Clients

Course Description Coming Soon!

EBP Audits in the Real World: Testing, Tech, and Cutting Through the AI Hype

Course Description Coming Soon!

The Single Most Important Strategy for Accountants in 2026

Join us for a forward-looking webinar designed to help CPA firms address the profession's most pressing challenges—talent shortages, rising client expectations, burnout, and accelerating technology change. Participants will explore how leading firms are responding to the accounting talent crisis by combining AI technologies with next-generation offshore staffing models to create scalable, future-ready practices. The session will examine the evolution of offshore staffing, the role of AI-enabled professionals, and practical frameworks for building strategic capacity, improving profitability, and shifting from compliance work to higher-value advisory services.

Justin Chastain

Kelly Mann

Julie A. Bonness

3:35 – 4:45pm

Cybersecurity Risk Trends Faced by Nonprofits  Yellow Book 56

Course Description Coming Soon!

Jennifer Louis

Estate Planning For the High-Net-Worth Family




Course Description Coming Soon!

Adrien Spandle and
James M. Harris III

4:45 pm | Refuel Reception

Spring Splash Accounting Conference Schedule (Day Two)

**This schedule is subject to change*

8:00 – 9:40am	
Economic Update This presentation will cover the current state of the Global Economy and the current trends, news, and exceptions for the markets, economy and consumer in 2026	Bert R. Arrowood
8:05 – 9:45am	
All The Queen's Horses  Yellow Book 24 How could one woman steal \$53 million without anyone noticing? All the Queen's Horses tells the story of Rita Crundwell, the perpetrator of the largest case of municipal fraud in American history. View the documentary and discuss the fraud and internal control issues related to the case.	Larry Finney
The Client's Lifecycle; Deductions and Credits for Real Life Situations From the grandparents looking to pass on their wealth to the teenager looking for a good start in life, everyone is looking to maximize their income and reduce their taxes paid. Tax advisors need to know a variety of topics usually taught in pieces. This presentation will pull together the deductions and credits based on the client's age, situation and goals. "The Client's Lifecycle; Deductions and Credits for Real Life Situations" will bring these credits together in one coherent picture for these types of clients. Topics covered include the new tips and overtime deduction, new car interest deduction, IRA withdrawal topics, gift tax and beyond.	Sarah Berg
BREAK	
10:00 – 10:50am	
Back to the Future of Taxes: Tax Planning and Integration in the Post-OBDDA Era Course Description Coming Soon!	David Zaiken and Cheryl Leydon
Breaking Down SOC Review Standards Into Real World Practice Course Description Coming Soon!	Kelly Mann
Inventory, Cost Accounting & Margin Integrity in Industry Course Description Coming Soon!	Diana M. Gentile
10:05 – 10:55am	
Stepping Through the Federal Regulations  Yellow Book 24 Understanding how major federal regulatory frameworks interact is essential for anyone working with federally funded programs or government contracts. Stepping Through the Federal Regulations provides a clear, structured walkthrough of how 2 CFR 200, the Federal Acquisition Regulation (FAR), and Cost Accounting Standards (CAS) work both independently and together to shape compliance expectations. Attendees will gain clarity on when each framework applies, where requirements overlap, and how to use that integrated understanding to reduce compliance risk and improve audit readiness.	Lori Allen, Adam Blanton, and Katherine Zablonksi
Mitigating Financial Reporting, Fraud and Noncompliance Risks in Government Entities  Yellow Book 24 Course Description Coming Soon!	Jennifer Louis
BREAK	

11:10am – 12:30pm

Partnerships K-1, Including Capital Account Changes and Foreign Tax Credit

Course Description Coming Soon!

Karen Davis

Consideration of Fraud

Course Description Coming Soon!

Melisa Galasso

Thinking Like an Auditor in Preparing Your Financial Statements

Course Description Coming Soon!

Jennifer Louis

11:15am – 12:35pm

Best Practices to Reduce Financial Risks for Governments Yellow Book 24

Course Description Coming Soon!

Larry Finney

Internal Control Fundamentals

Course Description Coming Soon!

Jaclyn Venno

12:30 - 1:30pm | Lunch

1:30 – 3:10pm

South Carolina Tax Update

Course Description Coming Soon!

J. William Strickland

Whats Going on at the FASB Yellow Book 56

Course Description Coming Soon!

Jaclyn Venno

Using Data Analytics to Give You A Competitive Advantage: AI and Data Inquiries

Through case studies and discussion, this course will explore what data analytics is and how AI can enhance our ability to derive meaning from data. Participants will be given scenarios in which to think about the data available, and how it can be applied within specific company contexts. The focus of the course will be on how to approach data using AI tools. We also give some insights on how to write better queries using AI software.

David Peters

1:35 – 3:15pm

Behind the Numbers: Building Defensible Federal Government Estimates

 Yellow Book 24

Developing a defensible cost estimate is one of the most critical and most scrutinized responsibilities in federal contracting. Behind the Numbers: Building Defensible Federal Government Estimates equips CPAs and financial professionals with a practical, repeatable framework for preparing a Basis of Estimate (BOE) that supports compliant pricing and stands up to audits, negotiations, and regulatory review. Attendees will learn what strong support looks like, how to avoid common pitfalls, and how to present estimating rationale clearly and credibly.

Lori Allen, Adam Blanton, and Katherine Zablonki

2026 AICPA Regulatory Ethics Update ET Ethics

Course Description Coming Soon!

Melisa Galasso

BREAK

3:30 – 4:40pm

Loss Limitations, Including Basis, At-Risk, Passive Activities and Excess Business Losses

Course Description Coming Soon!

Karen Davis

Addressing Common Documentation Deficiencies

Course Description Coming Soon!

Jaclyn Veno

Advanced Digital Asset Concepts

Proofing? Staking? Stablecoins? If you feel like your head is spinning with all of the digital assets that are out there, you are not alone. For many CFOs and Controllers, it may feel like learning a new language. The good news is that this language is very learnable, if you know the concepts (and you don't even have to conjugate any verbs)! In this course, we will differentiate the major terminology and talk about the accounting, tax, and practical implications of mining and staking, proof of work and proof of stake, and centralized and decentralized digital assets. We will discuss how smart contracts may be used in everyday business situations - and even spend a moment or two discussing how you can have an entity without any humans in it. It is all in this session on advanced digital asset concepts!

David Peters

3:35 – 4:45pm

Allowable, Allocable and Reasonable - Oh My! Yellow Book 24

Charging costs to federal contracts may seem straightforward, but determining whether a cost is allowable, allocable, and reasonable can be complex. Allowable, Allocable, and Reasonable Oh My! provides a practical, plain-language breakdown of the rules that govern what can and cannot be charged to federally funded work. Attendees will leave with decision-making tools and examples they can apply immediately to strengthen compliance, reduce audit findings, and support consistent, defensible charging practices.

Lori Allen, Adam Blanton, and Katherine Zablonksi

What's Going on at the GASB Yellow Book 24

Course Description Coming Soon!

Melisa Galasso