

Spring Splash Accounting Conference Schedule (Day One)

**This schedule is subject to change*

8:00 – 9:40am	
<p>Cases and Rulings Course Description Coming Soon!</p> <p>Accounting for Software Software-related transactions continue to evolve, requiring careful analysis under U.S. GAAP. This two-credit course examines the accounting treatment of software costs, with a primary focus on internal-use software and emerging guidance.</p> <p>Participants will walk through capitalization and expense recognition, amortization, and impairment considerations. The course includes a focused review of ASU 2025-06 and its impact on accounting for internal-use software.</p> <p>Additional topics include accounting for website development costs, Software-as-a-Service (SaaS) arrangements, and other cloud computing arrangements (CCAs), including implementation and hosting considerations. The course also addresses accounting for external-use software, including technological feasibility, capitalization thresholds, and related revenue considerations.</p> <p>Through practical examples and case-based scenarios, participants will strengthen their ability to interpret authoritative guidance and analyze the financial reporting implications of software-related transactions.</p> <p>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.</p> <p>Imagine turning those numbers into impactful graphs so they can see the trends and financial health of their company.</p> <p>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.</p>	<p>J. William Strickland</p> <p>Jaclyn Veno</p> <p>Ruth King</p>
8:05 – 9:45am	
<p>Grant Writing with AI: A Strategic Tool for Nonprofits Course Description Coming Soon!</p> <p>SC Tax Credits: Fundamentals for Strategic Tax Planning Using Historic, Abandoned Building, Textile Mill, and Affordable Housing credits Course Description Coming Soon!</p>	<p>Schrendria Robinson</p> <p>Holly Strategier</p>
BREAK	
10:00 – 10:50am	
<p>Bueller, Bueller... Is Your Tax Strategy Playing Hooky? Trump Taxes, Tariffs & Transfer Pricing Update Course Description Coming Soon!</p> <p>Quality Management Standards - Year 1 Post-Implementation Tips Participants will gain a clear understanding of recent guidance on implementing the AICPA's new Quality Management Standards and how it impacts audit and attest quality. The course highlights the foundational principles embedded in the standards and explains how they support consistent, high-quality service delivery. Attendees will leave better prepared to apply these principles in practice to strengthen quality management across their engagements.</p> <p>The Multigenerational Advantage: Building Stronger Teams for the Future Course Description Coming Soon!</p>	<p>David Zaiken, Kathleen Holston, and Cheryl Leydon</p> <p>Jennifer Louis</p> <p>Carlie Boese</p>

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**

Stay current on key developments affecting audit and attestation engagements with this comprehensive update on what's happening at the AICPA. This course begins with the next phase of quality management, with a particular focus on firms' monitoring and remediation responsibilities and what those requirements mean in practice.

Participants will also review recent and upcoming standards impacting audit, attestation, and consulting engagements, including SSAE No. 24 and SSARS No. 26, along with high-impact exposure drafts related to confirmations and fraud. The course concludes with an overview of SAS No. 149 and its implications for group audits.

Designed as a timely update for practitioners, this course helps participants understand how recent and proposed changes may affect engagement planning, execution, and compliance in the years ahead.

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

This course explores key modifications and clarifications designed to improve audit quality by strengthening the reliability of audit evidence. Participants will better understand how evolving standards emphasize higher-quality, more persuasive evidence in today's audits. The program also examines the growing impact of artificial intelligence and other technological advancements on how audit evidence is obtained and evaluated.

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

This session provides tax professionals with a clear, practical overview of the most significant recent developments in state and local taxation, with a focus on how evolving rules affect compliance, planning, and advisory work. As states continue to refine their approaches to OBBBA conformity, economic nexus, marketplace facilitator obligations, apportionment methodologies, and sourcing rules, staying current is essential for accurate guidance and risk mitigation. The lecture highlights key legislative updates and trends that are reshaping the SALT landscape, including state conformity, enactment of “millionaire taxes,” expansion of gross receipts taxes, and emerging trends in digital goods and services taxation.

Participants will gain insight into how states are responding to revenue pressures, adopting new conformity standards, and expanding audit activity—particularly in areas such as remote work, multistate service delivery, and marketplace inventory. Real-world examples illustrate how small regulatory adjustments can create meaningful exposure for multistate businesses, and how proactive planning can reduce administrative burdens.

By the end of the session, attendees will be better equipped to navigate the accelerating pace of SALT changes, anticipate areas of heightened scrutiny, and deliver informed, forward-looking advice in a rapidly shifting regulatory environment.

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 

This course reinforces critical concepts emphasized in the AICPA Audit Guide that support high-quality compliance audits. Participants will learn about new guidelines for designing and evaluating audit sampling in compliance engagements. The program also addresses frequently asked questions auditors encounter, helping practitioners apply guidance with greater confidence and consistency.

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!

Justin Chastain

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

Course Description Coming Soon!


Kelly Mann

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.

Julie A. Bonness

3:35 – 4:45pm

Cybersecurity Risk Trends Faced by Nonprofits  Yellow Book 56

This course provides an overview of the most common cybersecurity threats facing organizations today and the protections used to mitigate them. Participants will better understand practical safeguards that help reduce risk and strengthen cybersecurity awareness. The program also highlights effective ways to protect sensitive data in an increasingly digital environment.

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. You will learn why all levels of a government have a responsibility to prevent or detect fraud, especially in smaller governments where segregation of duties can be harder to accomplish. You will also learn how, in some cases, CPA firms also have a responsibility to detect fraud	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 This course examines key financial and non-financial risks faced by governments, with a focused look at fraud and noncompliance. Participants will learn how these risks impact operations, accountability, and public trust. The program also highlights internal controls critical to effective risk management, including the use of key performance metrics to monitor and mitigate risk.	Jennifer Louis
BREAK	

11:10am – 12:30pm

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

Course Description Coming Soon!

Consideration of Fraud

This course provides an in-depth exploration of AU-C 240, Consideration of Fraud in a Financial Statements Audit. Participants will gain practical insights into identifying, assessing, and responding to fraud risks within the context of financial statement audits. Through engaging lectures, real-world examples, and case studies, the course examines the nature and characteristics of fraud, including fraudulent financial reporting and misappropriation of assets. It also delves into the auditor's responsibilities under AU-C 240 for planning and performing audits with fraud considerations, techniques for identifying fraud risk factors and assessing risks of material misstatement, and methods for designing and implementing effective audit procedures. Additionally, participants will explore best practices for communicating and documenting findings related to potential or identified fraud. Ideal for auditors at all experience levels, this course equips attendees with the knowledge and tools necessary to navigate fraud-related complexities and maintain audit integrity.

Thinking Like an Auditor in Preparing Your Financial Statements

This course explores the key judgments involved in providing reasonable assurance that financial statements are free from material misstatement due to fraud or error. Participants will gain insight into how professional judgment influences critical decisions throughout the financial reporting process. The program also explains how to apply subjectivity, materiality, and other core judgment concepts when preparing financial statements and related disclosures.

Karen Davis

Melisa Galasso

Jennifer Louis

11:15am – 12:35pm

Best Practices to Reduce Financial Risks for Governments Yellow Book 24

You will learn some financial best practices for you to consider implementing to help you reduce the risk of errors, improve communication, better utilize your financial software and more.

Internal Control Fundamentals

AU-C Section 315 requires the auditor to gain an understanding of the entity and its environment and the entity's internal controls in order to design appropriate audit procedures. This course will review the key requirements of COSO which is one of the most widely used internal control frameworks. We'll also review the limitations of internal controls. Additionally, this course will introduce the risk assessment process and the various audit procedures to evaluate controls and to determine whether to test the operating effectiveness of controls.

Larry Finney

Jaclyn Veno

12:30 - 1:30pm | Lunch

1:30 – 3:10pm

South Carolina Tax Update

Course Description Coming Soon!

Whats Going on at the FASB Yellow Book 56

This course provides an efficient update on recent and upcoming accounting standard-setting activity issued by the Financial Accounting Standards Board (FASB). The course focuses on Accounting Standards Updates (ASUs) effective for December 31, 2026 year-ends for public companies, private entities, and not-for-profit organizations.

Participants will also review issued ASUs with future effective dates, along with high-level insights into recent exposure drafts. Emphasis is placed on understanding timing, scope, and areas of change that may affect financial reporting and implementation planning.

Designed as a practical update for preparers, auditors, and financial professionals, this course helps participants stay current on FASB activity and better anticipate the impact of evolving accounting standards.

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.

J. William Strickland

Jaclyn Veno

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.

2026 AICPA Regulatory Ethics Update  ET Ethics

Stay informed and ahead of the curve with this timely update on ethics and independence developments from the AICPA Professional Ethics Executive Committee (PEEC). The pace of change in ethics regulation has accelerated, and PEEC has been especially active with new interpretations, revised guidance, and significant modernization initiatives.

In this interactive course, we'll walk through the most important recent developments shaping ethical requirements for the profession, including updates affecting recruiting practices, private equity, and tax advisory services. Participants will gain practical clarity on how these changes impact both public practitioners and professionals in industry.

The course also looks ahead to proposed and ongoing projects on PEEC's agenda, providing insight into potential future changes and what they may mean for compliance planning in an evolving ethical landscape.

Lori Allen, Adam Blanton,
and Katherine Zablonksi

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

The Enhancing Audit Quality Initiative has identified inadequate or nonexistent audit documentation as one of the most significant issues facing the profession today. Over half of the engagements reviewed by the AICPA failed to meet the requirements of AU-C 230, highlighting a critical need for improvement.

Jaclyn Veno


This course addresses common misconceptions about audit documentation and provides actionable strategies to overcome these deficiencies. Attendees will learn best practices to ensure compliance with professional standards, enhance audit quality, and mitigate risks associated with poor documentation. Whether you are an experienced professional or new to auditing, this course will help you strengthen your documentation practices and uphold the highest standards of the profession.

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.

What's Going on at the GASB  **Yellow Book 24**

This course provides a focused update on major recent pronouncements issued by the Governmental Accounting Standards Board (GASB). Coverage includes GASB Statement No. 103 (financial reporting model), GASB Statement No. 104 (disclosures for capital assets), and GASB Statement No. 105 (subsequent events).

Participants will also receive a high-level overview of active GASB exposure drafts and ongoing projects. The course is designed to help auditors, preparers, and financial leaders understand how these developments affect audits, financial statement preparation, and board reporting.

Lori Allen, Adam Blanton,
and Katherine Zablonksi

Melisa Galasso