

Spring Splash Accounting Conference Schedule (Day One)

**This schedule is subject to change*

8:00 – 9:40am	
<p>Cases and Rulings Keep up to date on IRS rulings and court cases affecting Federal income tax. We will review recent court cases and review of recent IRS rulings and pronouncements.</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 In today's competitive funding landscape, nonprofit organizations must work smarter, not just harder, to secure grant funding. This 100-minute workshop equips non-profit executives, board members and those serving nonprofit organizations with the practical strategies to leverage artificial intelligence (AI) as a powerful tool in the grant writing process.</p> <p>SC Tax Credits: Fundamentals for Strategic Tax Planning Using Historic, Abandoned Building, Textile Mill, and Affordable Housing credits This presentation explores the South Carolina Property Rehabilitation and Housing Tax Credits programs and its benefits for property owners, developers, South Carolina taxpayers, and the community. Specifically, it will cover the SC Historic Rehabilitation Tax Credit, SC Abandoned Building Tax Credit, and SC Abandoned Mill Tax Credit as well as complimentary tax and community programs specific to property rehabilitation</p>	<p>Schrendria Robinson</p> <p>Holly Strategier</p>
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

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.

Jennifer Louis

The Multigenerational Advantage: Building Stronger Teams for the Future

Today's accounting and finance teams are more generationally diverse than ever — and for CPAs, that diversity can either slow you down or set you apart. With experienced professionals, rising leaders, and digital native talent working side by side, the firms that succeed will be the ones that align different perspectives toward a common goal.

Carlie Boese

Join us as we dive into what today's multigenerational workforce really means for finance and accounting leaders — and how to engage your entire team to drive stronger performance, smarter collaboration, and long term firm success. This high energy session breaks down the defining traits, communication styles, and motivators of each generation in the workforce, cutting through stereotypes to focus on what actually drives results. Attendees will gain practical strategies for hiring, managing, and engaging talent across generations — from retaining institutional knowledge to attracting and motivating the next wave of accounting professionals.

10:05 – 10:55am**Common Issues in Contribution Accounting, Grants and Discounted Pledges**  **Yellow Book 56**

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.

Jackie McLaughlin

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.

Jaclyn Veno

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.

BREAK

11:10am – 12:30pm

Capital Gains Primer

This session is an overview of tax law governing capital gains. A discussion of Internal Revenue Code and best practices dealing with capital gains, and discussions of relevant Internal Revenue Code sections governing capital gains and tax planning opportunities.

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.

Budgeting, Forecasting & Management Reporting in Industry

This course gives finance and accounting professionals a practical, real-world look at how budgeting, forecasting, and management reporting actually work inside organizations; not just in theory, but in reality. Attendees will learn why budgets fail, how to build better assumptions, and how to communicate financial performance with clarity and confidence.

You'll walk away with actionable tools to improve planning accuracy, strengthen forecast ownership, and elevate your role as the financial "narrator" who not only explains the surprises, but turns data into decisions.

J. William Strickland

Jennifer Louis

Diana Gentile

11:15am – 12:35pm

Financial Storytelling: Turning Numbers Into Mission Impact

Nonprofit financial data is more than compliance-it's a powerful narrative tool. This session equips nonprofit executives and CPA's to move beyond spreadsheets and audits to become strategic storytellers who connect financial performance to mission impact. By bridging the gap between numbers and purpose, participants can elevate their role as key partners in advancing organizational impact.

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!

Schrendria Robinson

Doug Van Dyke

12:30 - 1:30pm | Lunch

3:30 – 4:40pm

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

When a business owner exits after decades of building wealth, the real work begins—navigating the tax consequences. This course walks CPAs and financial advisors through the most complex and consequential tax events facing high-net-worth clients: structured business sales, installment agreements, qualified opportunity zone reinvestment, and the often-misunderstood rules governing inherited IRAs after the SECURE Act. Attendees will leave with actionable strategies to minimize tax exposure, optimize timing, and counsel clients with confidence at every stage of the wealth transfer lifecycle.

Justin Chastain

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

If you've sat through another conference session where someone told you AI is going to revolutionize your audit practice and walked away more confused than when you started, this one's for you. This session skips the hype and goes straight to what's actually happening in EBP audits right now. We'll start with real data from the field: what practitioners across the country are doing around sample sizes, testing procedures, and workpaper structure, and where the biggest inefficiencies are quietly eating into your realization. From there, we'll tackle the AI conversation head-on. Not all AI is created equal, and much of what's being marketed to auditors today is well-branded automation, not the game-changer it's billed as. You'll leave with a clear framework for separating meaningful tools from the noise and the right questions to ask any vendor before you sign anything. We'll close with a practical technology landscape built for EBP practices. No fluff. No vendor pitches. Just 70 minutes of conversation about where this profession is today and where it is headed.


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.

Charles McKissick

3:35 – 4:45pm

Cybersecurity Risk Trends Faced by Nonprofits 

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

This presentation explores the evolving landscape of estate planning strategies for high net worth families and the expanding role professionals play in guiding clients through complex, multi generational decisions. Attendees will gain an overview of recent estate strategy updates, current industry trends and planning considerations that impact affluent families today.

Adrien Spandle and James M. Harris III

The session also provides a practical review of three advanced estate planning strategies commonly used with high net worth clients: the Grantor Retained Annuity Trust (GRAT), the Spousal Lifetime Access Trust (SLAT), and the Intentionally Defective Grantor Trust (IDGT). Each strategy will be discussed in terms of structure, purpose, benefits, risks and ideal client scenarios, allowing participants to better understand when and how these tools may be effectively implemented.


Finally, the presentation will focus on how a client's CPA can redefine their role—from an administrative compliance provider to a proactive, strategic advisor. By collaborating on estate planning strategies, anticipating client needs, and facilitating informed conversations beyond the tax return, CPAs can deepen client relationships, enhance long term value, and position themselves as trusted advisors at the center of the client's advisory team.

Wells Fargo Advisors Financial Network does not provide legal or tax advice. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN), Member SIPC. James Harris & Company is a separate entity from WFAFN.

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 SOC 1 reports are a necessary part of every employee benefit plan audit — but they're also one of the most time-consuming and inconsistently documented areas in practice. This session cuts through the complexity and gives you a practical, step-by-step framework for evaluating SOC 1 reports efficiently and in full compliance with professional standards. You'll leave with a clear process for assessing period coverage, auditor quality, exceptions, carve-outs, and complementary user entity controls (CUECs) — plus documentation strategies you can implement immediately.	Kelly Mann
Inventory, Cost Accounting & Margin Integrity in Industry Inventory and cost accounting are two of the most misunderstood, yet most financially impactful, areas in industry. Small errors in inventory valuation can create large distortions in gross margin, and cost accounting assumptions often determine whether margin is real or an illusion. This course gives participants a practical, real-world understanding of how inventory flows through the financial statements, how cost accounting translates operational activity into financial results, and how margin integrity breaks down when processes fail. Attendees will learn how to identify margin distortion, strengthen cost accuracy, and partner with operations to ensure reported profitability reflects economic reality.	Diana 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

Over the years, IRS has added more and more codes to partnership Schedule K-1 to capture items of income, loss, gain, deduction and credit in granular detail. Schedule K-3 was added some years ago to provide information for calculation of the foreign tax credit. Now is your chance to make sense of all this.

Karen Davis

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.

Melisa Galasso

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.

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.

Larry Finney

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.

Jaclyn Veno

12:30 - 1:30pm | Lunch

1:30 – 3:10pm

South Carolina Tax Update

Keep up to date on SCDOR rulings and court cases affecting South Carolina income tax

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

The loss limitation rules are both interconnected and maddingly complicated, with suspended losses that carry forward indefinitely until they are available to be used. Which forms are used to compute these loss limitations and what does this all mean? Come to this seminar to find out.

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.

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!

Karen Davis


Jaclyn Veno

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