DAY ONE | THURSDAY, NOVEMBER 19, 2026

8:00 - 9:40 AM

What's Your And | *John Garrett*

8:05 - 9:45 AM

Nonprofit Risk Assessments for Audit Engagements | *Melisa Galasso*

Yellow Book 56

Course Description: This session will focus on practical lessons learned from implementing SAS 145 in nonprofit audits. Participants will review key risk assessment requirements, including separate consideration of inherent risk factors, and documentation expectations to support consistent execution. The course will also address the impact of IT on audits of smaller entities, including how system complexity, limitations of QBO, and automated controls can affect risk identification and response. The session closes with best practices for identifying, assessing, and responding to risks of material misstatement in nonprofit organizations.

Learning Objectives:

- *Explain the key changes in SAS 145 as they relate to risk assessment and documentation.*
- *Identify how IT affects risk assessment in smaller entities.*
- *Develop risk responses tailored to nonprofit entities.*

8:05 - 9:45 AM

From Discovery to Recovery, Solving the Data Breach Mystery | *Robert Keisler*

How to respond when a data breach has been discovered. A real-life example. From discovery to resolution. A data breach is not a question of it a data breach will occur; it is a question of when it will occur and how do you respond.

BREAK

10:00 - 10:50 AM

SC Tax Credits: Fundamentals for Strategic Tax Planning Using Historic, Abandoned Building, Textile Mill, and Affordable Housing Credits | *Geoff Cover*

10:00 - 10:50 AM

SAS 149 and 150 Practical Considerations | *Melisa Galasso*

Course Description: The Auditing Standards Board has issued two new SASes impacting audit engagements. We'll review the key changes in SAS 149 for Group Audits and SAS 150 for External Confirmations. Attendees will walk away with practical steps for implementation.

Learning Objectives:

- *Recall the changes in SAS 149 and 150.*
- *Apply new audit standards to audit engagements.*

10:00 - 10:50 AM

Cracking the Talent Code: Uncover the Secrets to Keep Top Talent on Your Team | *Lindsey Hilton*

Every organization is searching for answers to the same pressing question: Why are talented employees leaving, and what can leaders do to keep them engaged? Join recruiting expert Lindsey Hilton as she investigates the evidence to uncover the hidden factors that influence retention, engagement and performance in today's workplace.

Together, we'll follow the trail through onboarding, compensation, flexibility, career growth, workplace well-being and leadership effectiveness to identify what's driving employee decisions. You'll discover practical, research-backed strategies to strengthen your talent game before your top performers disappear.

Whether you're leading a finance team, managing a CPA firm or developing the next generation of leaders, this session will help you crack the case on creating a workplace where talented professionals want to stay, grow and thrive.

Attendees will:

- *Investigate key factors driving employee turnover, including compensation, flexibility, burnout and career development opportunities.*
- *Gather clues to build an onboarding experience that creates belonging, sets clear expectations and accelerates new hire success.*
- *Decode today's compensation and benefits expectations to remain competitive and improve retention.*
- *Uncover strategies to foster continuous learning through upskilling, mentoring, knowledge sharing and professional development.*
- *Examine leadership practices that build trust, communication and employee well-being while reducing burnout and increasing long-term engagement.*

10:05 - 10:55 AM

Endowment Essentials: Unlocking the Keys to Long Term Financial Stewardship | *Jackie McLaughlin*

Endowments can be a powerful source of long-term financial stability for nonprofits, but managing them effectively requires thoughtful policies, sound accounting practices, and careful stewardship. In this session, you'll gain practical insights into endowment accounting, donor restrictions, investment pools, spending policies, and financial reporting requirements. Learn how to navigate common challenges, strengthen internal controls, and implement operational best practices that support transparency, donor confidence, and your organization's long-term financial sustainability.

Learning Objectives:

Upon completion of this program, participants will be able to:

1. *Differentiate between donor-restricted, term, and board-designated endowments and identify the applicable accounting and UPMIFA considerations.*
2. *Apply appropriate accounting practices for endowment contributions, investment earnings, spending distributions, and investment pool allocations.*

10:05 - 10:55 AM

AI: Where Are We Now? | *Rick Krenmayer*

In less than a year, AI went from being somewhat useful to a co-worker that can actually get real work done. Let's talk about IT. This session cuts through the hype to show where AI really stands today: what it can reliably handle, where it still falls short, and what that means for CPA firms and accounting teams. You'll see real examples of what AI can do today and leave with a practical picture of how to start using it safely.

Objective: Describe how AI capabilities have advanced over the past year, identify practical ways today's AI tools can support work in accounting firms and finance teams, and recognize the key risks and safeguards for using them responsibly.

BREAK

11:10 AM - 12:25 PM

Federal Cases and Rulings | *Bill Strickland*

11:10 AM - 12:25 PM

Breaking Down SOC Review Standards into Real-World Practice | *Kelly Mann*

What You'll Learn

You'll learn how SOC 1 and SOC 2 reports differ, when a SOC 1 is needed for an audit, and how to build it into your risk assessment. We'll walk through a step-by-step approach to reviewing a report, from period coverage and service auditor quality to exceptions, carve-outs, control objectives, and CUECs. You'll also see how to document it all in a standardized workbook, and what to do when there's no SOC 1 at all.

Key Topics

- *SOC 1 vs. SOC 2 and when they are needed in an audit.*
- *Reviewing a SOC 1 report, including period coverage, exceptions, carve-outs, and CUECs.*
- *Documentation best practices.*

11:10 AM - 12:25 PM

Beyond the Balance Sheet: Protecting Your Energy, Focus, and Performance | *P. Sloan Joseph*

Success in accounting requires precision, concentration, and the ability to perform under pressure. But constant deadlines, extended work hours, and back-to-back responsibilities can quietly drain energy and increase stress.

This engaging and practical session explores simple strategies professionals can use throughout the workday to improve focus, reduce mental fatigue, establish healthier boundaries, and finish the day with energy left for life outside of work. Participants will leave with realistic tools they can begin using immediately, without changing careers, reducing productivity, or adding more to an already full schedule.

Learning Outcomes:

- *Recognize early signs of workplace burnout.*
- *Build healthy workday boundaries.*
- *Develop a sustainable workday routine.*

11:15 AM - 12:30 PM

Built to Last: Building a Nonprofit Organization That Outlives You | *Schrendria Robinson*

11:15 AM - 12:30 PM

Business Communication - 9 Areas for Leaders to Master | *Doug Van Dyke*

Technical expertise earns credibility. How you communicate determines whether others understand, trust, and act on it. This engaging, practical keynote explores nine communication areas that can help CPAs and accounting professionals lead teams, advise stakeholders, and turn complex information into clear messages.

LUNCH & NEW CPA OATH CEREMONY | 12:30 - 1:30 PM

1:25 - 3:05 PM

SC State Tax Update | *Bill Strickland*

1:25 - 3:05 PM

Own the Risk - A Strategic Approach to Risk Financing | *Stephen Lynch*

In every business, risk is present. The type of risk varies by entity, but no business exists without risk. Risk can be costly to reduce - however, failing to address or mitigate risk on the front end can hurt in the long run. With the hardening of the traditional insurance market and rising costs to conduct any type of business, captive insurance companies offer a unique way to both mitigate risk and potentially reduce the cost of mitigating such risk.

At the end of this presentation, participants should be able to:

- *Identify and describe different types of risk financing.*
- *Describe the main attributes of a captive insurance company.*
- *Identify how captive insurance can serve as an alternative risk financing mechanism.*

1:25 - 3:05 PM

Employee Versus Independent Contractor - IRS Determination | *Ashley Summers*

Employee vs. Independent Contractor: Navigating IRS Worker Classification Rules

Worker classification remains one of the most scrutinized compliance issues facing businesses today. This course provides CPAs and advisors with a practical overview of the IRS guidelines used to determine whether a worker should be classified as an employee or an independent contractor. Attendees will learn the IRS's three primary categories of evidence: Behavioral Control, Financial Control, and Relationship of the Parties, while exploring common classification mistakes, potential tax liabilities, and available relief programs. The session also includes real-world examples and discussion opportunities to help participants apply these concepts when advising clients.

As trusted advisors, CPAs are often the first professionals clients turn to when facing worker classification questions. Misclassification can result in significant payroll tax exposure, penalties, interest, and increased audit risk. This session equips attendees with practical knowledge to:

- *Better identify worker classification risks before they become costly issues.*
- *Understand the IRS framework used during worker classification audits.*
- *Advise clients on documentation, compliance, and risk mitigation strategies.*
- *Recognize common misconceptions surrounding independent contractor status.*
- *Gain insight into IRS relief and settlement programs available when classification errors occur.*

Attendees will leave with actionable guidance they can immediately apply to protect their clients, strengthen advisory relationships, and add value through proactive compliance.

1:30 - 3:10 PM

Grant Writing: Positioning Organizations for Unbelievable Results | *Schrendria Robinson*

Yellow Book 56

1:30 - 3:10 PM

SC Regulatory Ethics: Rules & Regulations (SC Statutes and Regulations) | *Chris Jenkins*

ET Ethics

BREAK

3:25 - 4:40 PM

Helping Business Owners Prepare for Life After Transition - The Intersection of Purpose, Wealth, Taxes and Legacy After the Sale of a Business. | *Adrien Spandle*

For many business owners, selling a business creates a once-in-a-lifetime liquidity event, yet the greatest challenges often begin after the transaction. While advisors excel at valuation, tax planning, estate strategies, and deal structure, owners frequently struggle with questions that spreadsheets cannot answer: What's next? Who am I without the business? How do I use this wealth to benefit my family, community, and future generations?

This presentation examines the intersection of transaction planning and life planning. Attendees will learn practical strategies to help clients prepare for both the financial realities and personal implications of a business exit. Using the framework of the Five ANDs of Successful Transition, participants will discover how to guide owners beyond the sale toward a future defined by stewardship, legacy, impact, and purpose.

Attendees will learn how to:

- *Prepare owners for the financial and emotional realities of transition*
- *Identify common planning blind spots before a transaction closes*
- *Facilitate conversations around family, legacy, and wealth stewardship*
- *Navigate post-sale liquidity, tax efficiency, and charitable planning opportunities*
- *Help clients redefine success and build a meaningful next chapter*
- *Ideal for CPAs and advisors who want to move from being technical experts to indispensable trusted advisors.*

3:25 - 4:40 PM

Transforming Audits with the Power of Advanced Data Analytics | *Kelly Mann*

What You'll Learn

You'll learn how looking at entire data populations, instead of relying on random samples, can sharpen your risk assessment and make your sample selections more meaningful, while simultaneously performing substantive tests of details.

Key Topics

- *AU-C 500 - Audit Evidence, and the shift from sample-based testing to full-population analysis.*
- *Building risk routines and scoring models to analyze full populations.*
- *Real-world case studies showing how analytics improve audit procedures and findings.*

3:25 - 4:40 PM

From Prompting to Power User: An Iterative Approach to AI | *Liz Peuster*

3:30 - 4:45 PM

FASB Updates | *Melisa Galasso*

Yellow Book 56

Course Description: 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.

Learning Objectives:

- *Recall effective dates for recently issued FASB standards.*
- *Recognize the impact of recently issued ASUs on financial reporting.*

3:30 - 4:45 PM

Mentoring Versus Coaching: What's the Difference, and How to Do It! | *Doug Van Dyke*

Your expertise can solve today's problem—or help someone build the capability to solve tomorrow's. Effective leaders know when to coach, how to mentor, and when to give clear direction. This practical keynote helps CPAs and accounting professionals make those choices intentionally. Laugh and learn while you learn how to distinguish mentoring from coaching, recognize when each approach is useful, and conduct development conversations that strengthen skills, confidence, and accountability.

Learning Objectives:

- *How to distinguish mentoring from coaching.*
- *How to recognize when each approach is useful.*
- *How to conduct development conversations that strengthen skills, team member confidence, and accountability.*

DAY TWO | FRIDAY, NOVEMBER 20, 2026

8:00 - 9:40 AM

Economic Update | *Wendy Brewer and Aaron Barber*

We will provide a timely market and economic outlook post the mid term elections. An update to review current and expected conditions for the stock market, interest rates and the general economy.

8:05 - 9:45 AM

Yellow Book & Single Audit Update | *Melisa Galasso*

Yellow Book 24

Course Description: This comprehensive course provides a focused update on key auditing developments affecting GAGAS and Single Audit engagements. The course integrates recent changes to the Yellow Book issued by the U.S. Government Accountability Office with major updates to Uniform Guidance and related Single Audit requirements. Participants will begin with an overview of significant revisions to the 2024 Yellow Book, including changes related to quality management, key audit matters, and effective dates. The course then shifts to recent developments affecting Single Audits, including the 2024 Uniform Guidance overhaul, updates to Appendix B of the AICPA GAS/Single Audit Guide, and the 2026 proposed changes to the Uniform Guidance. Designed for auditors working with governmental and nonprofit entities receiving federal awards, this course helps participants understand how recent auditing and compliance changes intersect—and what to monitor as expectations continue to evolve.

Learning Objectives:

- *Recall quality management requirements under the 2024 Yellow Book.*
- *Recognize the impact of the 2024 Uniform Guidance changes on Single Audits.*
- *Identify changes in Appendix B of the AICPA GAS/Single Audit Guide affecting Single Audit engagements.*

8:05 - 9:45 AM

New IRS Attacks on Those Making, Valuing, and Accepting Various Types of Charitable Donations | *Hale Sheppard*

The IRS has been challenging many types of charitable donations for years, raising standard arguments, evolving during the process, and expanding its focus over time. What started as the IRS scrutinizing donations that it considered abusive has morphed into frequent challenges to charitable gifts that are, by most accounts, routine. This presentation (i) explores recent IRS attacks on charitable donations of artwork, partial ownership interests in entities, special-purpose LLCs, religious artefacts, bargain sales, cash, and more, (ii) explains how the IRS has removed significant procedural protections for appraisers and launched attacks against them, and (iii) identifies threats of serious enforcement against charitable organizations using their tax-exempt status to facilitate transactions the IRS dislikes.

BREAK

10:00 - 10:50 AM

7 Habits of Highly Effective Tax Practitioners - Knowledge, Practical Wisdom and Skills | *Karen Davis*

This course will discuss the range of skills required for effective tax practice, including how to explain tax complexities in simple terms to clients. The course will also introduce an eight-week series on specific topics targeted as tax-season OJT to interns and junior staff - employee versus independent contactor, traditional and Roth IRA's, including backdoor Roths; Form 1099 brokerage account reporting, and more.

Learning objectives:

Participants will be better equipped to understand tax return preparation from soup to nuts and more confidently deliver a complete and correct return to clients.

10:00 - 10:50 AM

Intro to Accounting & Auditing ESG | *Melisa Galasso*

Course Description: Environmental, Social, and Governance (ESG) reporting has become an increasingly important area of focus for standard setters, regulators, and stakeholders. This course provides an overview of how ESG considerations intersect with accounting and attestation services, with attention to developments affecting both preparers and assurance providers.

Participants will review current ESG-related initiatives and projects underway at the Financial Accounting Standards Board, Governmental Accounting Standards Board, and the AICPA. The course also explores the types of services CPAs may provide in connection with ESG reporting, including advisory and attestation engagements, and discusses how these engagements differ in scope and responsibility.

Designed for CPAs seeking to understand the evolving ESG landscape, this course helps participants recognize where ESG fits within existing professional standards and how CPAs can support organizations seeking credibility and assurance over ESG information.

Learning Objectives:

- *Identify types of engagements CPAs may perform related to ESG information.*
- *Recall the impact current ESG-related projects and initiatives of accounting standard setters.*
- *Recognize proposed standards for ESG attestation engagements.*

10:00 - 10:50 AM

The Cost of Capital - The When, Why & How | *Dave Peters*

Have you ever wondered why a company chooses certain ways of capital funding over others? Through analysis, discussion questions, and a review of prevailing financial theory, this course explores why some companies choose debt financing, while others choose equity financing.

Objectives

- *Explain signaling theory, the Modigliani-Miller theorem, and some of the other ideas that inform our understanding of optimal capital structure.*
- *Calculate Weighted Average Cost of Capital (WACC).*
- *Determine the components of WACC and approximations that are used for each component.*
- *Discuss the reasons a company might use debt vs. equity financing.*

10:05 - 10:55 AM

AICPA's Latest Risk-Based Single Audit Guidance | *Jennifer Louis*

Yellow Book 24

The AICPA periodically issues Audit Guides as interpretative guidance towards applying generally accepted auditing standards. The 2026 version of the AICPA Audit Guide on Government Auditing Standards (GAS) and Single Audits was underwent the most significant revisions since 2009 Anyone who performed Single Audits needs to attend this training!

Learning Objectives:

- *Recognize critical concepts reinforced by the 2026 AICPA Audit Guide on GAS and Singe Audits.*
- *Identify new guidelines for designing and evaluating the sampling on compliance audits.*

10:05 - 10:55 AM

Business Owner Exit Planning: Start With the End in Mind | *Chris Disharoon*

BREAK

11:10 AM - 12:25 PM

Retirement Considerations for CPAs and Their Clients | *Bill Strickland*

11:10 AM - 12:25 PM

PCAOB and SEC Update | *Jennifer Louis*

High quality financial reporting and resulting audits are a priority for the PCAOB and SEC. This segment will update you with the latest areas of focus on developments for SEC filers and registered PCA03 audit firms.

Learning Objectives:

- *Describe areas of focus by the SEC. new rules, and developments by the PCAOB.*
- *Discuss areas of SEC and PCAOB emphasis to help registrants improve the quality of financial reporting.*

11:10 AM - 12:25 PM

Improving Your Profits - Identifying Cost Cutting Opportunities | *Dave Peters*

Part of one's duty as a CPA working in industry is to safeguard the assets of the organization. Cost cutting is one way to preserve assets and maintain a company's competitive position in the industry. However, what keeps us from ridding our organizations of unnecessary costs? In this course, we will look at the factors that prevent our companies from being as streamlined as they could be. By using statistics and survey data, we will attempt to show how to better negotiate and navigate budgeting and contracting decisions. We will also discuss financial statement analysis techniques, benchmarking, and cash flow management in an effort to better cut costs and maintain the long-run viability of an organization.

Objectives

- *List behavioral biases that prevent companies from being streamlined.*
- *Identify techniques that may be used to make cost cutting a part of the company's culture and business strategy.*
- *Demonstrate vertical and horizontal financial statement analysis.*
- *List key considerations when benchmarking against competitors.*
- *Discuss the business cycle and how cash flow management changes during each stage.*

11:15 AM - 12:30 PM

Project Accounting for Federal Government Contracts | *Lori Allen and Katherine Zablonski*

Yellow Book 24

Learn how to set up, track, reconcile, and support costs on federal government contracts. Participants will connect familiar managerial-accounting concepts to government project accounting, examine how costs move from timesheets through the general ledger and billing process, and evaluate how different indirect-rate structures affect individual contracts.

Learning Objectives:

- *Structure charge codes by contract, CLIN, task, and cost element.*
- *Distinguish direct costs, indirect pools, and allocation bases.*
- *Understand how contract type affects cost tracking and billing.*
- *Trace costs from source records through vouchers and submissions.*
- *Apply a practical monthly-close and reconciliation process.*
- *Compare labor-based, total-cost-input, and value-added rate structures.*
- *Understand how different pools and bases shift costs among contracts.*
- *• Maintain documentation that supports consistent and audit-ready accounting practices.*

11:15 AM - 12:30 PM

Circular 230 In the Age of Artificial and Practical Intelligence | *Karen Davis*

Circular 230 contains Treasury regulations that govern practice before the IRS. While these regulations haven't been revised in a while, IRS has begun issuing notices and advisories helping practitioners navigate risks and opportunities presented by artificial intelligence. This course will survey this fast-changing landscape.

This program will cover the main features of Circular 230, with a special emphasis on recent IRS guidance in the age of AI.

Learning objectives:

Participants will be better able to navigate the ethical and practical questions that arise with the integration of AI into tax practice.

LUNCH & SCHOLARSHIP LUNCHEON | 12:30 - 1:30 PM

1:25 - 3:05 PM

QBI Redux - OBBBA Changes for 2026 and Beyond | *Karen Davis*

This course will discuss nuances of QBI including SSTB, loss limitation rules, loss carryforwards, computational complexities, and recent changes to QBI effective starting in 2026. There will also be practical insights and cautionary tales arising from nearly a decade of experience with Form 8995 and its schedules.

Learning Objectives:

This course will allow practitioners to more confidently prepare Form 8995 and troubleshoot errors in the computation and loss carryforwards.

1:25 - 3:05 PM

2026 ACFE Fraud and Cybersecurity Trends | *Jennifer Louis*

Yellow Book 56

Preventing and detecting fraud and cybersecurity risks is critical for successful organizations Of all nature, size, and complexity.

- *This provide insights in to how best eliminate or mitigate these common risks.*
- *Characteristics of fraud perpetrators and fraud victims.*
- *Most common fraud schemes and how they are detected.*
- *Internal controls to most effectively mitigate fraud risk.*
- *Common cybersecurity trends threatening organizations.*

Learning Objectives:

- *Distinguish the cause and impact on real-life fraud cases based on the 2026 ACFE Fraud Survey.*
- *Recall what to be alert for in managing cybersecurity risk.*

1:25 - 3:05 PM

A Controller's Guide to Assessing the Risk of Your Organization: Coverages and Exclusions for Basic Business Policies |

Part of being a CFO or Controller is protecting the assets of the organization and managing risk. While many financial leaders feel comfortable with the strategic aspect of this task, finding the right insurance coverages can leave one feeling out of their element. This course will focus on three common business policies – the package policy, the business & property policy, and the cyber policy. Through case studies and illustrative examples, we will explore what these policies cover, as well as what they don't cover. We will also discuss how to have more productive conversations with outside insurance brokers.

Objectives

- *Identify the basic parts of a P&C insurance policy..*

- *Recognize the basic approach to building an insurance program for a company.*
- *State the coverages and exclusions for commercial package, building & property, and cyber insurance policies.*
- *Identify techniques to building a better partnership with outside insurance brokers.*

1:30 - 3:10 PM

Understanding Defense Contract Audit Agency (DCAA) Audit Programs | *Lori Allen and Katherine Zablonski*

Yellow Book 24

Learn how DCAA audits are planned, performed, reported, and supported after issuance. Participants will explore the publicly available audit programs, Contract Audit Manual, and related resources that drive DCAA audits and will learn how to use those materials to better prepare for audits or perform audit-quality work.

learning objectives:

- *Understand the phases of a DCAA audit.*
- *Navigate the DCAA Directory of Audit Programs.*
- *Identify common audit types across the contract lifecycle.*
- *Learn how audit scope is determined.*
- *Recognize what reviewers expect from audit documentation.*
- *Understand the roles of prime and subcontract auditors.*
- *Apply practical techniques to improve audit readiness and audit quality.*
- *• Use publicly available DCAA resources to anticipate audit requirements.*

1:30 - 3:10 PM

The Palmetto Payoff: Unlocking South Carolina Tax Credits | *Katie Cota, Jeremy Migliara, Jack Sierk, and Kelly Anderson*

Tax credits and incentives can create significant value for clients, but knowing when and how to leverage them is key. Join our panel of industry specialists for an engaging discussion of South Carolina tax planning opportunities, including allocated and investor tax credits, federal credits, state credits & incentives, and economic development programs.

Through real-world scenarios and a collaborative case study, panelists will explore how participants can identify opportunities, evaluate potential benefits, navigate timing considerations, and integrate multiple strategies to maximize client value. Attendees will leave with practical insights, key planning triggers, and a better understanding of when to engage specialty advisors to deliver more proactive, comprehensive tax planning solutions.

Learning objectives:

1. Detailed information specific to South Carolina allocated and investor tax credits, state tax credits & incentives, and economic development programs.

2. A better understanding of when to engage specialty advisors to deliver more proactive, comprehensive tax planning solutions.

BREAK

3:25 - 4:40 PM

Legislative Update | *Matt Davis, Paul Famolari, Cydney Milling, Susanna Sharpe, and Shannon Wiley*

3:30 - 4:45 PM

GAAP to Government Cost Accounting | *Lori Allen and Katherine Zablonski*

Yellow Book 24

Learn how to translate GAAP financial information into government contract costs. Participants will examine the roles of GAAP, FAR, 2 CFR 200, and CAS; apply the allowable, allocable, and reasonable cost tests; and work through an interactive

exercise that traces direct and indirect costs from the general ledger to individual contracts.

Learning Objectives:

- *Understand why a GAAP-compliant expense is not necessarily chargeable to the government.*
- *Distinguish direct costs, indirect pools, and allocation bases.*
- *Identify and segregate common unallowable expenses.*
- *Calculate and apply overhead and G&A rates.*
- *Reconcile contract-level costs to the company's GAAP financial statements.*
- *• Recognize the documentation and consistency auditors expect.*

3:30 - 4:45 PM

Getting Ahead: The Art of Marketing for CPAs | *Dave Peters*

To many clients, CPA firms all look the same. While services and specialties may vary significantly from one firm to another, it is hard for the average person to see this by simply looking at the sign outside our office door. Is there any way to make us stand out more to the outside world? Through surveys, statistics, and examples, this course looks at how CPA firms can develop a marketing plan beyond just relying on referrals. We look at the pluses and minuses of various marketing channels, regulatory constraints, and how to measure success in the competitive financial services space.

Objectives

- *Identify common problems involved in marketing CPA services.*
- *State the common elements of a marketing plan for a service organization.*
- *List ethical considerations and common state regulatory requirements CPA firms must abide by in their marketing practices.*
- *Describe what survey data and statistics show about the effectiveness of various marketing channels.*
- *Describe how to develop metrics to measure the success of marketing efforts.*