# Rethink

## BDO ALLIANCE USA VIRTUAL CONFERENCE

MAY 3–6, 2021

BDO
ALLIANCE USA

**Each year, we bring together our valued Alliance Members, respected BDO USA and global professionals and visionary leaders to help us successfully prepare for the challenges we face in the year ahead – and beyond. This year, for the health and safety of our members and guests, we will again offer our conference in a virtual format.**

## ABOUT Re*think*

With the trials and tribulations experienced in 2020, perhaps the most meaningful lesson learned is that the world is truly changing – now, more than ever. We have been challenged to respond to the pandemic within our own firms and alongside our clients too. We learned adaptation. We learned resiliency. We learned how to Rethink our approach to a variety of circumstances. And maybe to our surprise, we are now doing some of the things we never thought we would - or could - do before.

Now is the time to continue reassessing our business models, transforming our growth potential, and identifying new revenue streams. We have a unique opportunity to Rethink the future of our firms, to continue the journey of ensuring our success in today's new reality. Please join us for knowledge and inspiration at this year's conference, where we will be offering over 100 technical and professional skills sessions, along with a truly unique and interactive tradeshow and networking event!

FOLLOW US: **#BDOAllianceRethink**

# We are pleased to present our guest keynote speakers:

**Gary A. Smith**, Co-founder and Partner, IVY Planning Group, will be our keynote speaker on Monday, May 3. Specializing in strategy, diversity, leadership and change management, Mr. Smith will provide an overview of Diversity, Equity and Inclusion (DEI), outline why DEI matters, offer actions for leading with a DEI lens, and tips for getting started on your journey.

**Barry Melancon**, President and CEO of the AICPA, will be our keynote speaker on Wednesday, May 5. Mr. Melancon will speak about trends in the accounting profession, as well as current legislation and their effect on the profession overall.

**Brian Belski,** Chief Investment Strategist, BMO Capital Markets, will be our keynote speaker on Thursday, May 6. Mr. Belski has over 30 years of experience in the investment industry. Known for his accuracy as a strategist, he will provide us with an economic update and reflection on President Biden's first 100 days in office, among other topics.

## REGISTRATION INFORMATION

**Visit this link to register: http://bit.ly/bdoalliancerethink**

- There is no deadline to register; however, you must sign up through our registration process to gain access to the conference site. **We highly encourage registration and all software downloads to be completed no later than Friday, April 30.**
- Please register using your firm/work email domain; personal email accounts will not be recognized.
- The following pages showcase our agenda with more than 100 sessions, including dates and times. In addition to joining our daily General Sessions, you can choose the breakout sessions that you would like to attend as well.
- While you don't need to pre-select your breakout session choices during the registration process, we highly encourage you to make those decisions now to get them saved on your calendar. For your convenience, you will find calendar links within each session to help you manage that.

*Please note that CPE credit is estimated to be 1 credit for each 60-minute breakout session and 1.5 credits for each 90-minute breakout session, unless otherwise noted.*

## Who should attend? Everyone!

The virtual conference will appeal to a variety of technical and core business professionals in your firm. Offered at **no cost**, we welcome all of our member firms to experience the valuable training that the BDO Alliance USA provides. Whether you attend all sessions or only the ones that fit your schedule, we look forward to having a mix of participants from every member firm represented at our 2021 event.

# Schedule of Events

Please note all times listed in this brochure are in **Eastern Daylight Time (EDT)**.

## MONDAY, MAY 3

| | |
|---|---|
| 11:00 am – 12:30 pm | General Session |
| 12:45 pm – 1:45 pm | Breakout Sessions |
| 2:00 pm – 3:00 pm | Breakout Sessions |
| 3:15 pm – 4:15 pm | Social Pop-Up Event* (hosted in Virbela app)<br>Add session to calendar |

## TUESDAY, MAY 4

| | |
|---|---|
| 11:00 am – 12:00 pm | General Session |
| 12:15 pm – 1:15 pm | Breakout Sessions |
| 1:30 pm – 2:30 pm | Breakout Sessions |
| 2:45 pm – 3:45 pm | Breakout Sessions |
| 3:00 pm – 4:30 pm | Tradeshow* (hosted in Virbela app)<br>Add session to calendar |

## WEDNESDAY, MAY 5

| | |
|---|---|
| 11:00 am – 12:00 pm | General Session |
| 12:15 pm – 1:45 pm | Breakout Sessions |
| 2:00 pm – 3:00 pm | Breakout Sessions |
| 3:15 pm – 4:15 pm | Breakout Sessions |
| 3:00 pm – 4:30 pm | Tradeshow* (hosted in Virbela app)<br>Add session to calendar |

## THURSDAY, MAY 6

| | |
|---|---|
| 11:00 am – 12:00 pm | General Session |
| 12:15 pm – 1:45 pm | Breakout Sessions |
| 2:00 pm – 3:30 pm | Breakout Sessions |

### GENERAL SESSIONS & BREAKOUT SESSIONS

All General Sessions and Breakout Sessions for our 2021 Conference will be hosted online using the BDO Alliance USA conference website.

### TRADESHOW AND SPECIAL EVENTS

The Tradeshow and other social events will be hosted in Virbela, which is a different platform from the conference website. If you attended our AMPLIFY: Powered by the Business Resource Network event earlier this year, then you're already familiar with Virbela. Watch this preview for a sneak peek and stay tuned for details on how to download the app in April, so you can attend these special events!

# Monday, May 3
## 11:00 AM – 12:30 PM

Add session to calendar

### GENERAL SESSION

Hear from Alliance Executive Director Michael Horwitz, BDO USA, LLP CEO Wayne Berson, and IVY Planning Group Co-Founder Gary A. Smith. Michael will offer his "State of the Alliance Program" update discussing new initiatives from the past year, where we stand now and where we're headed in 2021 and beyond. He will also announce the winners of our annual BDO Alliance awards! Wayne will discuss BDO's current strategic focus which includes the BDO Alliance USA. Gary will provide an overview of Diversity, Equity and Inclusion (DEI), outline why DEI matters, offer actions for leading with a DEI lens, and tips for getting started on your journey.

## Breakout Sessions
## 12:45 – 1:45 PM

### ACCOUNTING & AUDITING

**ERISA Update**
BDO USA, LLP
Add session to calendar

This session will discuss developments in Employee Benefit Plans, including recent DOL activity, quality control findings and recent standards setting activity.

### TAX

**Transfer Pricing/Customs – Identifying Issues, Documentation and Risk Assessment**
BDO USA, LLP
Add session to calendar

This session will cover important recent transfer pricing developments and highlight how they may affect taxpayers in 2021. It will also include discussions of: the U.S. Tax Court decision in the Coca-Cola transfer pricing case; the status of proposals to address the taxation of the digital economy, including the OECD proposal, the U.S. position, and the status and effect of unilateral digital services taxes; and the effect of COVID-19 on transfer pricing and related government guidance.

**S Corporation Update**
BDO USA, LLP
Add session to calendar

This course will address the most significant developments within the last year of interest to S corporations and their shareholders, including the application of section 163(j); the Service's response to certain state enactments of pass-through entity taxes; PPP loans, related expenses and forgiveness; statutory developments under the CARES Act and Consolidated Appropriations Act, 2021; new Schedule K-1 reporting requirements for 2020 returns; and single-class-of-stock issues.

### MARKETING/BUSINESS DEVELOPMENT

**The Loyalty Effect**
Amanda Garner, The Growth Partnership (BRN Member)
Add session to calendar

Loyalty is by no means dead. In fact, the principles of loyalty are alive and well at the heart of every firm with an enduring record of growth and a recognized geographic brand. This session will focus on understanding the fundamental drivers of client loyalty - perhaps even more critical in today's pandemic/economic environment. Participants will also learn the principles of the "Net Promoter Score," developed by Bain fellow Fred Reicheld in his national bestseller, *The Ultimate Question*. We will also explore the critical role you play in a loyalty-based management system - to slow perpetual client churn.

## INDUSTRY

**Healthcare: Provider Relief Funds, Accounting, Tax and Compliance Aspects of the CARES Act**
BDO USA, LLP
Add session to calendar

In this session, BDO professionals will address the CARES Act and its significant impacts on healthcare providers.

## ADVISORY

**Launching an Advisory Services Practice**
Panel discussion facilitated by Paul Perry, Warren Averett, including Michael DeLuca, HBK, and Michael McCarthy, Hancock Askew & Co. LLP (CPA Members)
Add session to calendar

Traditional accounting firm services are experiencing increasing fee pressures by way of technological innovation and globalization of talent management. Expanding advisory services can be a strategy for growing market presence, retaining client base and improving firm profitability. Join this session to hear fellow Alliance firm leaders share what an advisory service practice means to them, the mindset needed to transition from annuity to project work, and how to build or buy an advisory services practice.

## MANAGING AN ACCOUNTING PRACTICE (MAP)

**Succession from the Successor's Point of View**
Gary Boomer and Jim Boomer, Boomer Consulting, Inc. (BRN Firm)
Add session to calendar

Learn the proven process used in exit planning while increasing value and focusing on unique abilities. Great leaders develop their successors.

**Diversity, Equity and Inclusion (DEI) Challenges 2021 – Observations from an Expert**
Gary A. Smith, IVY Planning Group
Add session to calendar

Why are we still talking about DEI in 2021? Aren't we "there" yet? This session will provide observations, from across industries and sectors, on the challenges to advancing DEI and achieving DEI success. This insightful session will assist you with predicting and overcoming the DEI roadblocks for your organization. It will also provide opportunity for you to "ask an expert" throughout the session or with Q&A at the end.

## EMERGING LEADERS

**Leveraging Your Time**
Clinton Wingrove, Infopro Learning, Inc. (BRN Member)
Add session to calendar

This session will address obstacles and challenges to managing time and prioritizing in today's workplace, while providing best practices for overcoming those challenges.

## HUMAN RESOURCES

**Becoming an Inspiring, Difference-Making Coach**
Tamera Loerzel, ConvergenceCoaching, LLC® (BRN Member)
Add session to calendar

Are you doing all that you can to motivate your talent and provide feedback in ways that are meaningful to them? Coaches that provide motivational and engaging environments with timely, specific feedback will win in the recruiting and retention race. In this session, we'll address the role of a coach and strategies to make it successful for all involved; explore strategies to build rapport with your coachees and questions to ask to learn their motivators, interests and desires; identify the fundamentals of delegation and discuss different strategies that lead to accountability, including effective goal setting; and touch on how to deliver feedback to help your coachees thrive.

## DIGITAL TRANSFORMATION

**Digital Transformation Outlook in the Marketplace**
Alliance Member panel discussion, facilitated by Chip Cohron, BDO USA, LLP
Add session to calendar

This session will feature a panel discussion with Alliance Members on market needs, challenges in Digital Transformation today, and how best to engage in your client conversations. We will also discuss BDO's recent Digital Transformation survey and its top 5 takeaways, as well as BDO Digital's 3+1 approach to client conversations.

## CLIENT ACCOUNTING & ADVISORY SERVICES (CAAS)

**Excel Treasure Maps**
Jeff Lenning, Excel University (BRN Firm)
Add session to calendar

Often in Excel, we need to get our data from Point A to Point B. However, getting raw data into a summary report, especially when labels are different, can be cumbersome. Mapping tables often provide the most efficient route, saving you time! In this session, we'll show participants three ways to implement a mapping table, including SUMIFS, Power Query and Power Pivot. No matter your Excel skill level, mapping tables will help you discover the treasure of efficiency.

# Breakout Sessions
# 2:00 – 3:00 PM

## ACCOUNTING & AUDITING

**Yellow Book Update and Practice Issues**
BDO USA, LLP
Add session to calendar

BDO's nonprofit leaders will discuss practice issues and lessons learned from the 2018 Yellow Book that became effective for June 30, 2020 engagements and other Yellow Book practice matters.

## TAX

**Fundamentals of Trust Taxation and Accounting**
BDO USA, LLP
Add session to calendar

This course will provide an overview of basic fiduciary accounting principles and trust taxation. We will discuss the flow of income through the trust, including fiduciary accounting income and distribution of principal and income. We will also discuss simple and complex trusts, the parties to a trust, and the governing instruments and law.

## MARKETING/BUSINESS DEVELOPMENT

**Customer-Centricity: The Key to Achieving Your Desired Outcomes**
Eric Tung and Kalliopi Vlastos, Dext (BRN Firm)
Add session to calendar

In a survey of 800+ advisors within our Orange Select accounting community, 42% of respondents stated that client retention was a top priority for their firm in 2021. During this presentation, we'll discuss the principles of 'customer-centricity' and reveal the critical factors to client retention, including customer-centricity, client experience, promoters vs. detractors; identifying key drivers to perform better in terms of revenue, profit, and employee engagement; focusing on your customers; and how to deliver best-in-class customer experience to grow your business and reignite purpose in your work.

## INDUSTRY

**Private Equity: Hot Topics**
BDO USA, LLP
Add session to calendar

This session will discuss the issues currently affecting the private equity industry. Private equity fund leaders will address the current deal climate, creative deal structuring, how due diligence is being affected, and a number of other hot button topics.

## ADVISORY

**Advisory Services: On Demand or White Label?**
Brian Powers, JGS, CPA, PC
Add session to calendar

An age-old industry tip: CPA firms should balance their practice mix by reducing compliance work and increasing value-added advisory services. A transition easier said than done. BDO's Business Resource Network (BRN) represents an opportunity for Alliance firms to offer a suite of advisory services without starting up your own practice. Hear how Alliance firms have leveraged the BRN to serve and retain clients, get a foot in the door of prospective clients, and create a market presence competitive with larger firms.

## MANAGING AN ACCOUNTING PRACTICE (MAP)

**Reenergize Your Growth Strategies**
Jennifer Wilson, ConvergenceCoaching, LLC® (BRN Member)
Add session to calendar

As we begin recovering from the pandemic and planning for the remainder of 2021, organic growth is top of mind for many leaders. Growth happens when you apply strategy, discipline and consistency. In this session, we'll explore four ways to grow your firm's top line, including raising fees and innovating new pricing and packaging approaches; expanding services with existing clients (the cross-selling holy grail of the accounting profession); squeezing your sales pipeline to help you close more business; and understanding social selling to generate leads and ensure a healthy pipeline. Leave this session reenergized with practical ideas you can implement to grow your top line.

## EMERGING LEADERS

**Building Relationships Virtually**
Richard Silkes, Infopro Learning, Inc. (BRN Member)
Add session to calendar

The International Data Corporation estimates that by 2024 mobile workers will account for nearly 60% of the workforce in the United States. Make sure you're on top of the virtual workplace trend. Join this session to learn how to build relationships virtually.

## DIGITAL TRANSFORMATION

**Technology Update on Digital Transformation Tools**
BDO USA, LLP
Add session to calendar

This session will provide an overview of digital transformation tools and people resources to help BDO and Alliance Members work together on client projects.

## CLIENT ACCOUNTING & ADVISORY SERVICES (CAAS)

**Tips and Tricks for QuickBooks® Online**
BDO USA, LLP
Add session to calendar

This session will uncover the best tips and tricks while using QuickBooks Online.

# Tuesday, May 4
## 11:00 AM – 12:00 PM

Add session to calendar

### GENERAL SESSION

Hear from BDO Global CEO Keith Farlinger and BDO USA, LLP COO Steve Ferrara. Keith will discuss BDO's overall strategic focus and insights into the accounting industry on a global scale. Steve will provide his insights and perspectives on the Firm of the Future, given a changing industry, as well what accounting firms need to do to appeal to millennials and other groups.

## Breakout Sessions
## 12:15 – 1:15 PM

### ACCOUNTING & AUDITING

**Assurance Practice Leaders Meeting – Part 1**
Target Audience: A&A Practice Leaders
Add session to calendar

Hear from BDO's Audit & Assurance Leaders on Audit Quality, Risk Mitigation, Market Trends and BDO Rise (BDO's new offshore A&A service offering). This session will be moderated by Jim Hayden, Alliance Relationship Partner, featuring a panel discussion with Bill Eisig, BDO USA's National Managing Partner of Assurance; Christopher Tower, BDO USA's National Assurance Managing Partner of Audit Quality and Risk; Phillip Austin, BDO USA's National Assurance Managing Partner of Auditing; and Chris Orella, BDO USA's National Assurance Managing Partner of Operations. *Note: Part 2 will continue in the next breakout session slot at 1:30 pm.*

**Independence Update and Practice Issues**
BDO USA, LLP
Add session to calendar

This session will discuss developments and reminders in the areas of ethics and independence.

### TAX

**Estate Planning Techniques**
BDO USA, LLP
Add session to calendar

This session will provide an overview of various estate planning techniques, focusing mainly on the most used techniques. We will discuss various planning techniques, such as grantor trusts, charitable trusts and family limited partnerships. We will also discuss which are the most common estate planning techniques and the advantages and disadvantages of those techniques, based on current political and financial environments.

### MARKETING/BUSINESS DEVELOPMENT

**How to Attract and Delight the Right Clients to Your Accounting Firm**
Jess Dodge, Globalization Partners (BRN Firm)
Add session to calendar

This session will share tools and tips you need to know to put in place a strategic marketing plan that delights your prospects, partners, and employees. We will cover how to successfully use digital marketing programs to generate highly qualified leads, boost visibility of your firm's expertise, and build brand leadership. You will walk away with actionable insights on the best digital marketing tools that work today; how to monitor the right metrics and conversion data; how to motivate your audience with compelling and thoughtful content and how to make the process fun along the way.

**Relationship Management: Deepening the Bond, Bringing More Value**
BDO USA, LLP
Add session to calendar

Building and nurturing relationships with clients during the current business environment is challenging. Learn about relationship management best practices and how BDO's Relationship & Account Management (RAM) teams are creating value for their priority clients.

## INDUSTRY

**Deep Dive into BDO USA's Healthcare CFO Outlook Survey**
BDO USA, LLP
Add session to calendar

This session will dive into what BDO learned from its 2021 Healthcare CFO Outlook Survey, including the transformation needed to meet future care, resiliency and risk profiles.

## ADVISORY

**Are You Walking Your Advisory Services Talk?**
Rick Schreiber, Alexander Thompson Arnold PLLC (CPA Member)
Add session to calendar

There are many ways to deliver on the "advisor" brand promise. Join this session to learn from a fellow Alliance firm's national advisory services practice leader in the development and implementation of a comprehensive advisory services plan, which includes: the culture and mindset needed for success; internal and external marketing and education; how to bring in outside subject matter experts when needed; and the firm leadership's commitment to growing an unpredictable practice.

## MANAGING AN ACCOUNTING PRACTICE (MAP)

**Effectively Transitioning Responsibility from One Generation to Another**
Jennifer Wilson, ConvergenceCoaching, LLC® (BRN Member)
Add session to calendar

Organizations across the country are preparing for (or are already facilitating) the retirement of thousands of talented Baby Boomer CPAs. Many elements of succession need attention, but one of the most important areas to address is effective transition of responsibility. Transition affects far more than the retiree – because their transition creates a ripple effect that causes all others in the organization to shed responsibility too. Transition will be an ongoing process for leaders as they move their responsibilities to others. Attend this session to discuss answers to the most common transition questions those engaged in transition ask, such as: when should we start transitioning; what mindset do I need to have to either let go or step up; how should we approach transition; how do we choose the people that we transition to; and when and how do we tell staff, clients and/or other external stakeholders?

## HUMAN RESOURCES

**Creating High Performance Teams with Talent Optimization and The Predictive Index** Phil Bryan, ExecHQ LLC (BRN Member) and Bobbi Kelly, Kreischer Miller (CPA Member)
Add session to calendar

The presentation will focus on strategies for building high performance teams and an unbeatable culture through the use of Behavioral Analysis and management tools delivered through the Predictive Index. We will also address communication strategies and team dynamics.

## DIGITAL TRANSFORMATION

**BDO Tax Performance Engineering: Tax Delivery Model**
BDO USA, LLP
Add session to calendar

This session will focus on how BDO Alliance firms can leverage BDO internally for their tax practice operations.

## CLIENT ACCOUNTING & ADVISORY SERVICES (CAAS)

**AI in CAAS: What is Your Strategy?**
Panel discussion facilitated by Todd Robinson, Vic.ai (BRN Firm), including Deborah Defer, BDO USA, LLP and Matt Long, Rea & Associates, Inc. (CPA Member)
Add session to calendar

In 2020, technology adoption skyrocketed to unprecedented levels within the corporate world. The number one technology trend of the next decade – Artificial Intelligence (AI) – was found to have accelerated six years in only five months. As CAAS and Outsourced Accounting are poised to become the most offered new accounting services, firms need to find a way to embrace technology like AI to support their practice growth. Join this session to review why now is the time to develop an AI strategy and how it can help your firm re-invent its capabilities to meet a rapidly changing client landscape.

# Breakout Sessions
# 1:30 – 2:30 PM

## ACCOUNTING & AUDITING

**Assurance Practice Leaders Meeting – Part 2**
Target Audience: A&A Practice Leaders
Add session to calendar

This interactive session will feature BDO USA and Alliance Members discussing APT Next Gen and BDO's digital suite of tools, including user reviews. It will be moderated by Paroshni Mudaly, featuring a panel discussion with BDO USA's National Audit Leaders and Alliance Firm Leaders using APT Next Gen.

**Single Audit Surprises and Other Matters**
BDO USA, LLP
Add session to calendar

This session will cover Single Audit updates and practice matters, and what you need to know with recent COVID-19 legislation.

## TAX

**Private Client Services (PCS) Update**
BDO USA, LLP
Add session to calendar

This course will provide an overview of PCS-related tax updates, including the CARES Act, SECURE Act, and the Consolidated Appropriations Act (CAA). Participants will be able to recognize how the new legislation may affect their clients and corresponding planning opportunities. We will also discuss current PCS trends and the impact of current political and financial environments.

**Sales & Use Tax Update**
BDO USA, LLP
Add session to calendar

This session will discuss recent changes in sales and use tax statutes and how they impact various industries. Real world examples of these changes will be discussed to help participants better understand the impact to their clients. We will also discuss best practices and solutions including custom applications as well as prepackaged solutions.

## MARKETING/BUSINESS DEVELOPMENT

**The Art of High Impact Conversations: How to be a great conversationalist even if you aren't the most gregarious person in the room**
Christine Hollinden, Hollinden marketers + strategists (BRN Member)
and Tim Reynolds, Davidson, Holland, Whitesell & Co., PLLC (CPA Member)
Add session to calendar

Have you ever been to a networking event where the conversation just stopped? Or, worse yet, been in a prospect meeting filled with awkward silence? Building and maintaining relationships goes hand-in-hand with being skilled in the art of conversation, but not all conversations are equal. High impact conversations build relationships and uncover pertinent information – keeping all parties engaged. It's as much art as it is science. In this session, we will teach you how to be a masterful conversationalist. We will explore how to have meaningful conversations that turn prospects into clients and clients into advocates.

## INDUSTRY

**Retail: 2021 Pulse – Issues & Opportunities Ahead**
BDO USA, LLP
Add session to calendar

Join BDO's Retail & Consumer Products industry leaders as they examine current events and trends in the retail space and discuss where the industry may be going in the future. This lively analysis will also cover recent hot topics, as well as ways we can bring more value to our clients and prospects.

## ADVISORY

**An Advisory Vertical Strategy**
Gary Shamis, Winding River Consulting, LLC (BRN Member)
Add session to calendar

Clients want CPA firms with deep knowledge of their industry and/or specific needs. This is the pinnacle of advisory services—the highest value proposition. Learn how to grow these channels from someone who has been there and done that, building one of the largest firms in the country using this focused strategy.

## MANAGING AN ACCOUNTING PRACTICE (MAP)

**The Accountability Advantage: How Accountability Drives High Performance**
Gary Thomson, Thomson Consulting, LLC (BRN Member)
Add session to calendar

There is a direct link between high performance and accountability. There's also an intersection of organizational and personal accountability which produces the best results. This session will explore the concept of "high performance" and how leaders decide what to measure and around which to build accountability; distinguish "accountability" from "responsibility"; share examples of organizations that have successfully created a performance culture with accountability as its cornerstone; and provide practical steps for creating and implementing an accountability framework that supports leadership strategies and individual goals.

## HUMAN RESOURCES

**How HR KPIs Impact the Firm and How to be Strategic About What to Do with Them**
Sandra Wiley, Boomer Consulting, Inc. (BRN Firm)
Add session to calendar

HR KPIs are really "business" KPIs. HR professionals must understand and apply strategies that will improve overall business performance. In this session, we will not just look at KPIs; we will learn how to apply the knowledge to actual actions that will bolster the business and provide added value from a talent perspective.

## DIGITAL TRANSFORMATION

**Digital Project Case Studies: BDO Alliance Firms and Clients**
BDO USA, LLP
Add session to calendar

This session will provide examples of projects with BDO Alliance firms and how BDO has helped clients with digital projects. We will offer strategies for how to identify client opportunities too.

## CLIENT ACCOUNTING & ADVISORY SERVICES (CAAS)

**What's the Difference Between Financial Accounting and Managerial Accounting?**
Dave Bergstein, Vic.ai (BRN Firm)
Add session to calendar

This session will explain the purposes of financial statements and why they are important. Income statements, balance sheets and statements of cash flow are prepared regularly. Do you know why they are important and what makes them valuable to owners and investors, etc.? This session will help participants understand what they represent. In addition, the emergence of real-time Managerial Accounting statements will demonstrate how accounting is changing the focus from past to present and future reporting.

# Breakout Sessions
# 2:45 – 3:45 PM

## ACCOUNTING & AUDITING

**The Impact of New ISQM Standards on Firms' Systems of Quality Management**
BDO USA, LLP
Add session to calendar

The IAASB and POIB adopted new quality control standards that will significantly impact how firms manage quality control within their assurance practices. This session will provide an overview of the newly issued standards and provide an awareness of some of the more significant considerations that firms need to be proactive in evaluating.

## TAX

**Small Business Simplification**
BDO USA, LLP
Add session to calendar

This session will cover the final small business taxpayer regulations issued in late December 2020, which address the TCJA exemptions from the requirement to use accrual, UNICAP, inventories and the percentage of completion method.

**Alternative Liquidity Structures for Business Owners: ESOP as a Tax-Advantaged Buyer**
BDO USA, LLP
Add session to calendar

This course will provide a detailed overview in the use of an Employee Stock Ownership Plan (ESOP) as a viable alternative to the third-party sale of a business. An ESOP sale provides the liquidity of a fair market value transaction with added tax benefits to the seller and the company post-deal.

## MARKETING/BUSINESS DEVELOPMENT

**Hard Core Selling Tactics – Adapt or Die**
Panel discussion facilitated by Bob Lewis, The Visionary Group (BRN Member), including Mindy Elinski, LVBW CPAs & Advisors; Nicole Cunningham, H&CO, LLP; and Tom Takasaki, BDO Alliance USA
Add session to calendar

Whether CPAs realize it or not, they are in the entertainment business. Successful firms are always selling. Our panel of partners understand the prospecting and sales cycle and will dive into selling challenges, starting with "who is the right prospect?" They will discuss their sales strategies, how to minimize the fear of losing, and break down objections including pricing. We will demonstrate new ways to communicate, especially when remote selling might be the norm moving forward, and how to connect with other decision makers you haven't yet met. Because the pandemic has changed the way we interact, we will also go beyond the hard core selling discussion and demonstrate new impactful techniques for incorporating brief, yet personalized, videos into your prospecting, networking and client cross-selling.

## INDUSTRY

**Private Equity: Partnering with Healthcare**
BDO USA, LLP
Add session to calendar

Join this session to learn about the exciting changes in the private equity-backed healthcare industry.

## ADVISORY

**What's Next for Nonprofit Resilience? Helping Organizations Thrive During Uncertainty**
BDO USA, LLP
Add session to calendar

COVID-19, the economy and the recent elections have resulted in a greater focus on sustainability, resilience, and the current and future funding impact on organizations. This session will focus on the characteristics of resilient nonprofits and those that are doing better or thriving in the current uncertain environment. We will also focus on the breadth of services that can help nonprofit organizations be sustainable or thrive in these times.

## MANAGING AN ACCOUNTING PRACTICE (MAP)

**Fuel Growth through Vision, Strategy and Innovation**
Marc Staut, Boomer Consulting, Inc. (BRN Firm)
Add session to calendar

Success starts with having a clear vision of what you want your firm to be in the future. A vision is the foundation to strategic planning and innovation and will get your firm in alignment and rowing in the same direction.

## EMERGING LEADERS

**Employee Motivation and Engagement in the New World of Work**
Jordan Birnbaum, ADP LLC (BRN Firm)
Add session to calendar

Periods of uncertainty are inherently challenging for most people, and clearly have the potential to interfere meaningfully with our organizations' ability to continue to do great work. As such, it is critically important that organizations find the most practical and impactful ways to address employee motivation and engagement in the current environment, because trusting that your people will find ways on their own to stay motivated and engaged is, scientifically speaking, unlikely to work. In this session, we will go back to the basics on employee motivation and engagement to determine how best to apply the fundamentals to real-world situations today. We'll also look at how ADP developed Compass, an award-winning product using behavioral economics, to address employee motivation and engagement.

## HUMAN RESOURCES

**Living Your Firm Values: Using Goals to Increase Employee Engagement**
Josh Tyree, Harris CPAs (CPA Member)
Add session to calendar

Are your firm values ingrained in the DNA of your firm, or do they need help being brought back to life? While having your core values defined is a step in the right direction, what strides is your firm taking to ensure that your values help guide you when reviewing your processes, the technology you use, and any other important decisions you may make? In this session, we will review the goal process in which you take a deeper look at your core values and develop new firm initiatives, over a defined period, to help breathe new life into your values. This process was recognized at the 2020 BDO Alliance Conference as part of the *Redefining Excellence Awards: Exceptional and Engaged People* category and we are excited to share this process with our fellow Alliance Members!

## DIGITAL TRANSFORMATION

**The Future of Audit is Here - Part 1: Transforming the Audit with BDO's Digital Suite of Tools**
BDO USA, LLP Panel
Add session to calendar

This session will showcase BDO USA's digital suite of audit tools and their rollout to Alliance Members. *Note: Part 2 will continue on May 5 @ 2:00 pm.*

# Wednesday, May 5
## 11:00 AM – 12:00 PM

Add session to calendar

### GENERAL SESSION

Hear from President and CEO of the AICPA Barry Melancon. Barry will speak about trends in the accounting profession, as well as current legislation and their effect on the profession overall.

## Breakout Sessions
## 12:15 – 1:45 PM

### ACCOUNTING & AUDITING

**Unveiling BDO's Next Generation in Audit Innovation**
BDO USA, LLP
Add session to calendar

Discover APT Next Gen and BDO's innovative digital suite of tools to see how they are benefiting BDO and onboarded Alliance Members today as they rethink their audits. Anyone rethinking, innovating or transforming the way they audit, should attend this session!

**Adding Value to the Board: Hot Topics in Governance**
BDO USA, LLP
Add session to calendar

Those charged with governance are responding to calls from broad stakeholders for more transparency in their oversight of corporate strategy, financial and non-financial reporting, risk management and compliance. Learn more about the topics your client board members are interested in and increase the value you can bring to the boardroom.

### TAX

**Tax Practice Leaders Meeting**
Target Audience: Tax Practice Leaders and Tax Specialty Firm Members of BRN
Add session to calendar

This session is for tax practice leaders and will include a BDO national tax panel on recent developments; a presentation on BDO's Tax 4.0, a multi-year, digital transformation program; and a discussion on Tax Transformation.

**Partnerships and Private Equity**
BDO USA, LLP
Add session to calendar

During this session, we will address a number of key issues facing private equity funds including carried interest calculations under section 1061; partnership considerations relating to the acquisition of section 1202 qualified business stock; and choice of entity considerations based on possible changes in tax rules.

### MARKETING/BUSINESS DEVELOPMENT

**Remote and Blended Business Development**
Tamera Loerzel, ConvergenceCoaching, LLC® (BRN Member)
Add session to calendar

Developing new business is primarily about relationships. With the pandemic shifting us to a remote or blended environment, we must effectively conduct meetings with existing clients, prospects and referral sources without being in person.

Happily, developing relationships and generating new business can be done from anywhere when you shift your mindset and processes to accommodate. In this session, we'll explore how to: overcome the objections and get comfortable with remote business development; utilize technology throughout your networking and sales process to facilitate connection and propel opportunities forward; make relationship development as effective remotely as in-person so you can further your networking, referral relationships and client development; and present your solution, including scope and pricing, using remote methods in an effective and convincing manner.

## INDUSTRY

***Note this session will be a 60-minute session from 12:15-1:15 pm.***

**Financial Institutions & Specialty Finance: The Impact of Government Stimulus on These Entities and Their Borrowers**
BDO USA, LLP
Add session to calendar

Government stimulus has had a significant impact on Financial Institution and Specialty Finance - and the companies that borrow from them. Join this session for a fast-paced discussion on hot areas and pitfalls to watch for.

## ADVISORY

**Restructuring: How to have the difficult conversation**
BDO USA, LLP
Add session to calendar

CPAs are uniquely positioned to identify troubled companies on the brink of collapse, yet find difficulty in having the conversation with the client to get the company on the right track. Join this session to understand signs and symptoms of distress, as well as how to engage in productive dialogue that will lead the client to understand options, preserve value, avoid insolvency, and even thrive.

## MANAGING AN ACCOUNTING PRACTICE (MAP)

**Behind the CPA M&A Deal: Lack of speed kills**
Bob Lewis, The Visionary Group (BRN Member)
Add session to calendar

This session will offer a breakdown of real firm deals, including what killed the deal, how obstacles were overcome, what to focus on in an opportunity, and how to talk to the other firm involved.

## EMERGING LEADERS

**Leadership Skills: Handling difficult conversations**
BDO USA, LLP
Add session to calendar

Join us as we share best practices and strategies for navigating difficult conversations like a pro. Just the thought of initiating a difficult conversation can prompt the rearranging of a "to do" list, to move that item right to the bottom. Unfortunately, these conversations are a necessary part of doing business. While they can be anxiety producing, the great news is that there are skills that can help you step into these conversations feeling more prepared.

## CLIENT ACCOUNTING & ADVISORY SERVICES (CAAS)

**What's a T-Account?**
David Bergstein, Vic.ai (BRN Firm)
Add session to calendar

This session will cover the basics of what accounting is and how it works. Attendees will walk away with a knowledge of the importance of accounting as the language of business. Accounting is a process that can be explained via the accounting equation and what a T-account represents. The session will focus on the process of recording, sorting and summarizing economic data which is the basis for client accounting services.

## OTHER

**Professional Ethics Update**
Jeanne H. Yamamura, CPA, CGMA, MIM, PhD
Add session to calendar

This course provides busy CPAs with an overview of recent changes in ethical standards and a review of common regulatory violations. Inclusion of the latest issuances and coverage of ethical violations ensure that the most important issues affecting practitioners will be discussed. Participants will have an opportunity to test their recall of common ethical requirements. The focus is practical application – not just a dry recitation of the rules!

# Breakout Sessions
# 2:00 – 3:00 PM

## ACCOUNTING & AUDITING

**ASC 740: Accounting for current events and other practice matters**
BDO USA, LLP
Add session to calendar

This course will review key concepts related to accounting for income taxes, including the impact of COVID-19 relief packages and other current events.

## TAX

**Section 1202 Planning**
BDO USA, LLP
Add session to calendar

The session will start by introducing the capital gain exclusion (up to 100%) provided to non-corporate shareholders that sell qualified small business stock within the meaning of section 1202. The instructors will then discuss the requirements for qualified small business stock, including certain traps for the unwary. Lastly, we will discuss some of the practical considerations of section 1202 in M&A transactions.

**SALT Income/Franchise Tax Nexus, Conformity and Other Trends**
BDO USA, LLP
Add session to calendar

Given the COVID-19 pandemic and its impact on state budgets, more states are expected to adopt economic nexus and/or "factor-presence" nexus for corporate income tax purposes, while also grappling with teleworker nexus. In addition, states are still trying to come to grips with conformity with or decoupling from the CARES Act, the Consolidated Appropriations Act 2021, and potentially new tax legislation as a result of the 2020 federal elections. This session will address these state income/franchise tax trends, as well as other important state income tax developments.

## MARKETING/BUSINESS DEVELOPMENT

**Developing a Plan for CRM**
Jon Hubbard, Boomer Consulting, Inc. (BRN Firm)
Add session to calendar

It seems every firm is either wanting a CRM, actively implementing a CRM or looking to improve the effectiveness of their CRM. With so many vendors, options and features, it can be overwhelming. It's common for firms to feel their CRM projects have failed. To increase your success, you need a framework and process that is driven by your needs and business goals. In this session, you will learn how to: best determine your true purpose for a CRM; identify what you should carry forward from what's currently working in your firm and what needs to be left behind; understand your key audiences for the CRM system; determine the key success criteria; and evaluate CRM solutions based on the information above.

## INDUSTRY

**Manufacturing: The Factory of the Future**
BDO USA, LLP
Add session to calendar

This session will address what manufacturing facilities are/can be doing with automation and data analytics.

## ADVISORY

**Current and Historical Trends in Bankruptcy and Its Interplay with Valuation**
BDO USA, LLP
Add session to calendar

This session will cover a lookback at trends in bankruptcies that occurred during the Great Recession, compared to bankruptcies that have occurred in the current COVID environment. We will specifically walk through valuation's role and considerations to be aware of during the Chapter 11 process.

**The Building Blocks of a Successful M&A Transaction**
Bob Snape, BDO Capital Advisors, LLC
Add session to calendar

This session will discuss strategies and methods to help maximize shareholder value in a private company sale transaction. Topics will include pre-sale planning, assembling the right deal team, pitfalls to avoid and keys to success. The material will include current market trends, recent case studies and the outlook for middle market M&A in 2021.

## EMERGING LEADERS

**Results and Outcomes: Igniting and Managing High Performance in a Remote Environment**
Heather Kinzie, The STRIVE Group, LLC (BRN Firm)
Add session to calendar

Performance management is a process and thoughtful attention is required for each phase of that process. Often, distance disrupts our attention, but it doesn't have to! This insightful session breaks down the phases of performance management while offering tips and insights regarding engaging in each phase over distance. Participants will appreciate where their barriers to success have been, while we help illuminate their path forward. They'll receive pragmatic ideas and tools to better engage in an effective and continually improving performance management process in the future.

## DIGITAL TRANSFORMATION

**The Future of Audit is Here - Part 2: A Future Inspired by Innovation**
BDO USA, LLP Panel
Add session to calendar

This session will take a deep dive into BDO's digital suite of tools, revealing the cutting-edge innovations coming to Alliance Members. While we will continue the discussion started in The Future of Audit - Part I (May 4 @ 2:45 pm), attendance at that session is not required for this session.

## CLIENT ACCOUNTING & ADVISORY SERVICES (CAAS)

**Outsourced Accounting Considerations for Nonprofits**
BDO USA, LLP
Add session to calendar

Whether you specialize in nonprofits or not, almost every outsourcing practice finds itself serving at least one. Given the high-profile nature and unique considerations, it's important to have a basic understanding of the operations, issues and opportunities involved with this sector. This session is designed to help your team streamline its services, properly address common issues and identify value-added ideas to best serve these organizations.

# Breakout Sessions
# 3:15 – 4:15 PM

## ACCOUNTING AND AUDITING

**Troubled Debt Restructuring and Debt Modification**
BDO USA, LLP
Add session to calendar

This session will review key concepts when analyzing the accounting in a troubled debt restructuring and debt modification scenario.

## TAX

**Corporate Tax Update**
BDO USA, LLP
Add session to calendar

This course will provide an update on corporate legislative and administrative developments covering the end of 2020 and the early quarters of 2021. Topics will focus on issues concerning corporate tax planning and compliance and will also highlight market trends that are pertinent to the topics discussed.

**International Tax Developments**
BDO USA, LLP
Add session to calendar

The international tax landscape is constantly changing with new guidance from the IRS and Treasury. A panel will discuss recent international tax developments and the impact such developments can have on your clients with cross-border structures and transactions.

## MARKETING/BUSINESS DEVELOPMENT

**How to Turn Email Addresses into Clients**
Abbey Kanellakis, Rea & Associates, Inc. (CPA Member)
Add session to calendar

Your marketing database is full of potential clients. But if you don't take the time to properly (and regularly) nurture them, you will never discover this fact for yourself. The new names that are added to your database aren't added by accident; they are there for a reason. Regardless of whether they signed up for your newsletter, registered for a webinar, or were deliberately added to the list, these prospects are looking for something and they are looking to you to deliver. In this session, attendees will learn: why you should be investing time, energy, and even dollars into keeping your database clean and current; how you can use your database to identify opportunities for marketing success; how to approach your email marketing strategy to maximize results; and what to communicate with your sales team before, during, and after your campaigns.

## INDUSTRY

**Dealership Taxes: A Comprehensive Look at Old and New Legislation**
Rex Collins, HBK (CPA Member)
Add session to calendar

This session will cover tax planning for auto, truck and heavy equipment dealerships and not be limited to what has changed due to the pandemic. We will look at how to integrate those changes with the prior tax laws to give dealers ideas on how to make the most of old and new provisions to preserve cash and lower tax expenses.

## ADVISORY

**Top IT Audit Risks**
BDO USA, LLP
Add session to calendar

Information Technology is a rapidly evolving space that organizations can leverage to be a business enabler. However, the evolution of Information Technology has also brought increased risks and regulatory requirements. How do Advisory professionals stay ahead of the evolving risk landscape presented by IT and the impact on their clients? What are the key IT areas that currently present risk to companies? We'll discuss these and other questions.

## MANAGING AN ACCOUNTING PRACTICE (MAP)

**Seven Things Every Leader Needs to be Doing to Grow Their Firms in 2021**
David Toth, Winding River Consulting, LLC (BRN Member)
Add session to calendar

Our new reality is that a decade of digital transformation occurred in six months. And it affects everybody we work with, from staff to clients, vendors to communities. This digital world impacts the way people interact, network and build sustainable relationships. Join this session as we lay the framework for building a sustainable

practice in a virtual world through business development. Topics will include: giving employees the tools to be successful in a hybrid world; company culture in a virtual world; investing in your digital assets (social media, technology, website); and the pain points of a modern business development professional and how to address them.

## CLIENT ACCOUNTING & ADVISORY SERVICES (CAAS)

**CAS Practice Success Metrics: KPIs That Drive Results**
Renee Moelders, ConvergenceCoaching, LLC® (BRN Member)
Add session to calendar

We manage what we measure. In CAS, we benefit from outlining the right measures that fit our unique practices, which aren't always the same as those used by other parts of the firm. Without measures, we find it hard to cause accountability from our team, or to successfully gain the buy-in of other firm leaders for our plans to grow the practice. Attend this session to explore the nuances of measuring a CAS practice, including: striking a balance between traditional and "new-school" measures, as well as current production and future capacity KPIs; exploring results-based and future-focused measures that inspire your team members and drive the right kind of activities to sustain and grow the practice; and discussing ways that you can influence practice profitability as well as the success of the firm in the way you manage your people and engagements.

# Thursday, May 6
## 11:00 AM – 12:00 PM

Add session to calendar

### GENERAL SESSION

Hear from BMO Capital Markets' Chief Investment Strategist Brian Belski. With over 30 years of experience in the investment industry, Brian will provide us with an economic update and reflection on President Biden's first 100 days in office, among other topics.

## Breakout Sessions
## 12:15 – 1:45 PM

### ACCOUNTING & AUDITING

**GASB Update and Practice Issues**
BDO USA, LLP
Add session to calendar

BDO's governmental practice leaders will lead a discussion on the latest changes issued by the Governmental Accounting Standards Board (GASB) and the status of current projects being deliberated, including several recently issued GASB Statements.

### TAX

**Financially Troubled Companies**
BDO USA, LLP
Add session to calendar

This course covers the basic federal income tax rules applicable to corporations and consolidated groups, partnerships and S corporations in bankruptcy or undergoing an out of court debt workout.

### MARKETING/BUSINESS DEVELOPMENT

**Why Your Website and Your Email Database are Two of the Most Important Tools in Your Marketing Strategy**
Betsy Gray, The Social Bullpen, LLC (BRN Member)
Add session to calendar

In 2020, we all experienced disruptions of many kinds. We realize now in the remote-work environment that our websites must be up-to-date, clearly communicating our message: who we are, who we serve and how we serve them; how we solve problems for our clients; and how we attract new team members. In today's marketing, the only two things you own are your website and your email database, so let's make the most of your two greatest assets. Your email database can help keep you in communication with your clients and prospects without skipping a beat. In this session, we'll discuss why you need to take a fresh look at your website, and how to identify, prioritize and implement improvements. We'll also cover best practices for managing your email database, and how to create the content your audience wants!

### INDUSTRY

**Technology: Industry Update**
BDO USA, LLP
Add session to calendar

This session will cover current events, hot topics and trends within the technology industry.

## ADVISORY

**M&A, Value Creation and Distressed Company Support in a Post-Pandemic Economy**
BDO USA, LLP
Add session to calendar

This session will cover current trends in mergers and acquisitions and related services for clients to help maximize the value of their transactions. Also covered will be a discussion of sectors impacted most severely by the pandemic and the services currently being provided to companies in financial and operational distress.

## MANAGING AN ACCOUNTING PRACTICE (MAP)

**Transitioning for Dummies: How to merge, sell or evaluate succession**
Bob Lewis, The Visionary Group (BRN Member)
Add session to calendar

This session takes a different look at CPA M&A, with a focus on the potential value of smaller firms. While estimates vary, there are approximately 46,000 CPA firms according to a survey from *Accounting Today*. 500 of them were valued at $3M or more, which leaves almost 99% of firms with great clients, staff and referral partner relationships that are not the typical target to pursue. Many of those 99% are in your neighborhood, but they may have some obstacles in place. Pursuing the larger deal should always be on the table, but what if you could go with three or four smaller, but good deals? If you are looking to acquire, or addressing your own succession or transition options, there may be ways to approach more firms to successfully conduct a transaction. This session will explore ways to reduce the barrier of acquiring or merging in smaller firms.

## EMERGING LEADERS

**Building High Functioning Teams**
BDO USA, LLP
Add session to calendar

This course explores ways to help your team become cohesive and more productive to achieve results. To accomplish this, we will apply the model for teamwork from author and management consultant Patrick Lencioni's best-selling book, *The Five Dysfunctions of a Team*.

## CLIENT ACCOUNTING & ADVISORY SERVICES (CAAS)

**CAS to CAAS: Transitioning from Accounting to Accounting & Advisory**
BDO USA, LLP
Add session to calendar

How long have you been providing bookkeeping services? Outsourced accounting services? Financial advisory services? Likely, you're somewhere along the continuum and not sure how to get to the next level. We'll start by focusing on one end – the traditional public accounting small business model (bookkeeping, tax work, etc.). Then, we'll move through the phases to an advisory-based model, discussing how your practice can fit with an industry finance and accounting org chart to position you for long-term engagements and high-level input. Can the evolution to a CAAS model work and help your practice? This session will help you take a broad look at your practice and determine if you're ready to position your services to fit market demand and play at the top of the food chain.

# Breakout Sessions
# 2:00 – 3:30 PM

## ACCOUNTING & AUDITING

**Performing Preparations, Compilation and Review Engagements**
Marci Thomas, Surgent CPE (BRN Firm)
Add session to calendar

CPA firms generally perform a significant number of preparations, compilation and review engagements under the Statements of Standards for Accounting and Review Services (SSARS). Compilations and reviews are performed as attest engagements, where preparation engagements do not require independence and as such are considered non-attest engagements. Reviews, like audits, are considered assurance services. Reviews provide limited assurance that financial statements are free of material misstatement. In addition, the CPA may perform other non-attest services, such as bookkeeping. CPAs must fully understand the professional responsibilities related to each of these varying levels of services in order to effectively and efficiently satisfy engagement objectives and ensure compliance with professional standards relative to independence.

## TAX

**Partnership Update**
BDO USA, LLP
Add session to calendar

During this session, we will cover the most recent guidance and rule changes impacting partnerships and their partners. Topics to be covered will include the section 1061 carried interest rules, section 163(j) business interest limitations, calculation and disclosure of tax basis capital balances, updates on the new IRS partnership audit rules, and an overview of capital account maintenance and income tools currently being piloted.

**Tax Controversy and Procedure Update**
BDO USA, LLP
Add session to calendar

This session focuses on the general IRS examination and appeals functions. Timelines of typical and atypical examinations through appeals are discussed, along with the various procedural options available to those undergoing examination. Other topics include recent developments in federal tax procedure, current court cases, trends in IRS examinations and appeals, and other relevant IRS activity.

## MARKETING/BUSINESS DEVELOPMENT

**How Marketing & Business Development Should Intersect to Accelerate Your Growth**
Jon Hubbard, Boomer Consulting, Inc. (BRN Firm)
Add session to calendar

If you want to be a high-growth firm, you need to align your firm's marketing and business development strategies. It's common for these two areas to be misaligned with inefficient processes, and with both wasting time creating content (blogs, social media, email newsletters, case studies and videos) without clear goals. When these two areas of your firm are in alignment, they work together to drive sales and revenue, dramatically improving your marketing return on investment, and driving growth. So how can you make that happen? The key is to set clear revenue goals. In this session, you will learn the 8-step process to follow to ensure your sales and marketing efforts are aligned.

## MANAGING AN ACCOUNTING PRACTICE (MAP)

**Pulse of the Managing Partner**
Panel discussion facilitated by Michael Horwitz, Executive Director of BDO Alliance USA
Add session to calendar

Whether you are a managing partner, partner or aspiring partner, you'll benefit from hearing the perspectives of a panel of Managing Partners representing small, medium and large Alliance firms. We will distribute the results of an updated survey related to MAP topics.

## EMERGING LEADERS

**Delegating Excellence: Keys to growing and capitalizing on your team's resources**
Heather Kinzie, The STRIVE Group, LLC (BRN Firm)
Add session to calendar

No one ever rises to low expectations. Think about that for a second! The phrase, "I'll do it myself" can often mean or be perceived as "I don't think you can do it" or "I don't want you to do it." Effective leaders learn to delegate so their team members can grow their competencies and feel valued at work. This session encourages participants to honestly assess why they struggle with delegating and identify how they might begin to improve. They'll receive pragmatic ideas and tools to help enable effective, efficient and accountable delegation.

## HUMAN RESOURCES

**Managing Culture in a Remote Work Environment**
David Friedman, High Performing Culture, LLC (BRN Member)
Add session to calendar

While we all hope the pandemic will be behind us soon, the remote workforce is here to stay. How do you preserve, manage and even grow your firm's culture when many of your people are rarely together? In this session, participants will learn tips and suggestions they can put to use right away.

## CLIENT ACCOUNTING & ADVISORY SERVICES (CAAS)

**Turning Your CAAS/Outsourcing Practice from a Loss Leader to a Profit Center**
BDO Alliance USA Panel
Add session to calendar

For years, firms have performed "back office work," sometimes as clean-up before "bigger" projects begin and sometimes as support for businesses without on-site talent. But after a major shift in thought (and approach), firms across the country are starting to count client/outsourced accounting services as their most consistent, reliable and profitable service lines. Others have capitalized on the opportunity to peer deeply into the client's daily operations to identify advisory and cost-saving opportunities, solidifying relationships for life. Instead of taking a back seat, these service lines are now moving up to be the primary drivers of client relationships. Join a panel of BDO Alliance firms as they share how they have worked to systemize, productize and optimize their practices for financial results that garner attention and respect.

# Accounting & Auditing

| | May 3 | | May 4 | | | May 5 | | | May 6 | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 12:45 – 1:45 PM | 2:00 – 3:00 PM | 12:15 – 1:15 PM | 1:30 – 2:30 PM | 2:45 – 3:45 PM | 12:15 – 1:45 PM | 2:00 – 3:00 PM | 3:15 – 4:15 PM | 12:15 – 1:45 PM | 2:00 – 3:30 PM |
| ERISA Update | ▶ | | | | | | | | | |
| Yellow Book Update and Practice Issues | | ▶ | | | | | | | | |
| Independence Update and Practice Issues | | | ▶ | | | | | | | |
| Assurance Practice Leaders Meeting – Part 1 | | | ▶ | | | | | | | |
| Assurance Practice Leaders Meeting – Part 2 | | | | ▶ | | | | | | |
| Single Audit Surprises and Other Matters | | | | ▶ | | | | | | |
| The Impact of New ISQM Standards on Firms' Systems of Quality Management | | | | | ▶ | | | | | |
| Unveiling BDO's Next Generation in Audit Innovation | | | | | | ▶ | | | | |
| Adding Value to the Board: Hot Topics in Governance | | | | | | ▶ | | | | |
| ASC 740: Accounting for current events and other practice matters | | | | | | | ▶ | | | |
| Troubled Debt Restructuring and Debt Modification | | | | | | | | ▶ | | |
| GASB Update and Practice Issues | | | | | | | | | ▶ | |
| Performing Preparations, Compilation and Review Engagements | | | | | | | | | | ▶ |

# Tax

| | May 3 | | May 4 | | | May 5 | | | May 6 | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 12:45 – 1:45 PM | 2:00 – 3:00 PM | 12:15 – 1:15 PM | 1:30 – 2:30 PM | 2:45 – 3:45 PM | 12:15 – 1:45 PM | 2:00 – 3:00 PM | 3:15 – 4:15 PM | 12:15 – 1:45 PM | 2:00 – 3:30 PM |
| Transfer Pricing/Customs – Identifying Issues, Documentation and Risk Assessment | ▶ | | | | | | | | | |
| S Corporation Update | ▶ | | | | | | | | | |
| Fundamentals of Trust Taxation and Accounting | | ▶ | | | | | | | | |
| Estate Planning Techniques | | | ▶ | | | | | | | |
| BDO Tax Performance Engineering: Tax Delivery Model | | | ▶ | | | | | | | |
| Private Client Services (PCS) Update | | | | ▶ | | | | | | |
| Sales & Use Tax Update | | | | | ▶ | | | | | |
| Small Business Simplification | | | | | ▶ | | | | | |
| Alternative Liquidity Structures for Business Owners: ESOP as a Tax-Advantaged Buyer | | | | | | ▶ | | | | |
| Tax Practice Leaders Meeting | | | | | | ▶ | | | | |
| Partnerships and Private Equity | | | | | | | ▶ | | | |
| Section 1202 Planning | | | | | | | ▶ | | | |
| SALT Income/Franchise Tax Nexus, Conformity and Other Trends | | | | | | | | ▶ | | |
| Corporate Tax Update | | | | | | | | ▶ | | |
| International Tax Developments | | | | | | | | | ▶ | |
| Financially Troubled Companies | | | | | | | | | | ▶ |
| Partnership Update | | | | | | | | | | ▶ |
| Tax Controversy and Procedure Update | | | | | | | | | | |

# Marketing/ Business Development

| | May 3 | | May 4 | | | May 5 | | | May 6 | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 12:45 – 1:45 PM | 2:00 – 3:00 PM | 12:15 – 1:15 PM | 1:30 – 2:30 PM | 2:45 – 3:45 PM | 12:15 – 1:45 PM | 2:00 – 3:00 PM | 3:15 – 4:15 PM | 12:15 – 1:45 PM | 2:00 – 3:30 PM |
| The Loyalty Effect | ▶ | | | | | | | | | |
| Customer-Centricity: The Key to Achieving Your Desired Outcomes | | ▶ | | | | | | | | |
| How to Attract and Delight the Right Clients to Your Accounting Firm | | | ▶ | | | | | | | |
| Relationship Management: Deepening the bond, bringing more value | | | ▶ | | | | | | | |
| The Art of High Impact Conversations: How to be a great conversationalist even if you aren't the most gregarious person in the room | | | | ▶ | ▶ | | | | | |
| Hard Core Selling Tactics – Adapt or Die | | | | | | ▶ | | | | |
| Remote and Blended Business Development | | | | | | | ▶ | | | |
| Developing a Plan for CRM | | | | | | | | ▶ | | |
| How to Turn Email Addresses into Clients | | | | | | | | ▶ | | |
| Seven Things Every Leader Needs to be Doing to Grow Their Firms in 2021 | | | | | | | | | ▶ | |
| Why Your Website and Your Email Database are Two of the Most Important Tools in Your Marketing Strategy | | | | | | | | | | ▶ |
| How Marketing & Business Development Should Intersect to Accelerate Your Growth | | | | | | | | | | |

# Industry

| | May 3 | | May 4 | | | May 5 | | | May 6 | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 12:45 – 1:45 PM | 2:00 – 3:00 PM | 12:15 – 1:15 PM | 1:30 – 2:30 PM | 2:45 – 3:45 PM | 12:15 – 1:15 PM | 2:00 – 3:00 PM | 3:15 – 4:15 PM | 12:15 – 1:45 PM | 2:00 – 3:30 PM |
| Healthcare: Provider Relief Funds, Accounting, Tax and Compliance Aspects of the CARES Act | ▶ | | | | | | | | | |
| Private Equity: Hot Topics | | ▶ | | | | | | | | |
| Deep Dive into BDO USA's Healthcare CFO Outlook Survey | | | ▶ | | | | | | | |
| Retail: 2021 Pulse – Issues & Opportunities Ahead | | | | ▶ | | | | | | |
| Private Equity: Partnering with Healthcare | | | | | ▶ | | | | | |
| Financial Institutions & Specialty Finance: The Impact of Government Stimulus on These Entities and Their Borrowers | | | | | | ▶ | | | | |
| Manufacturing: The Factory of the Future | | | | | | | ▶ | | | |
| Dealership Taxes: A Comprehensive Look at Old and New Legislation | | | | | | | | ▶ | | |
| Technology: Industry Update | | | | | | | | | ▶ | |

# Advisory

| | May 3 | | May 4 | | | May 5 | | | May 6 | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 12:45 – 1:45 PM | 2:00 – 3:00 PM | 12:15 – 1:15 PM | 1:30 – 2:30 PM | 2:45 – 3:45 PM | 12:15 – 1:45 PM | 2:00 – 3:00 PM | 3:15 – 4:15 PM | 12:15 – 1:45 PM | 2:00 – 3:30 PM |
| Launching an Advisory Services Practice | ▶ | | | | | | | | | |
| Advisory Services: On Demand or White Label? | | ▶ | | | | | | | | |
| Are You Walking Your Advisory Services Talk? | | | ▶ | | | | | | | |
| An Advisory Vertical Strategy | | | | ▶ | | | | | | |
| What's Next for Nonprofit Resilience? Helping Organizations Thrive During Uncertainty | | | | | ▶ | | | | | |
| Restructuring: How to have the difficult conversation | | | | | | ▶ | | | | |
| Current and Historical Trends in Bankruptcy and Its Interplay with Valuation | | | | | | | ▶ | | | |
| The Building Blocks of a Successful M&A Transaction | | | | | | | ▶ | | | |
| Top IT Audit Risks | | | | | | | | ▶ | | |
| M&A, Value Creation and Distressed Company Support in a Post-Pandemic Economy | | | | | | | | | ▶ | |

# Managing an Accounting Practice (MAP)

| | May 3 | | May 4 | | | May 5 | | | May 6 | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 12:45 – 1:45 PM | 2:00 – 3:00 PM | 12:15 – 1:15 PM | 1:30 – 2:30 PM | 2:45 – 3:45 PM | 12:15 – 1:45 PM | 2:00 – 3:00 PM | 3:15 – 4:15 PM | 12:15 – 1:45 PM | 2:00 – 3:30 PM |
| Succession from the Successor's Point of View | ▶ | | | | | | | | | |
| Diversity, Equity, and Inclusion (DEI) Challenges 2021 – Observations from an Expert | ▶ | | | | | | | | | |
| Reenergize Your Growth Strategies | | ▶ | | | | | | | | |
| Effectively Transitioning Responsibility from One Generation to Another | | | ▶ | | | | | | | |
| The Accountability Advantage: How accountability drives high performance | | | | ▶ | | | | | | |
| Fuel Growth through Vision, Strategy and Innovation | | | | | ▶ | | | | | |
| Behind the CPA M&A Deal: Lack of speed kills | | | | | | ▶ | | | | |
| Seven Things Every Leader Needs to be Doing to Grow Their Firms in 2021 | | | | | | | | ▶ | | |
| Transitioning for Dummies: How to merge, sell or evaluate succession | | | | | | | | | ▶ | |
| Pulse of the Managing Partner | | | | | | | | | | ▶ |

# Emerging Leaders

| | May 3 | | May 4 | | | May 5 | | | May 6 | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 12:45 – 1:45 PM | 2:00 – 3:00 PM | 12:15 – 1:15 PM | 1:30 – 2:30 PM | 2:45 – 3:45 PM | 12:15 – 1:45 PM | 2:00 – 3:00 PM | 3:15 – 4:15 PM | 12:15 – 1:45 PM | 2:00 – 3:30 PM |
| Leveraging Your Time | ▶ | | | | | | | | | |
| Building Relationships Virtually | | ▶ | | | | | | | | |
| Effectively Transitioning Responsibility from One Generation to Another | | | ▶ | | | | | | | |
| The Art of High Impact Conversations: How to be a great conversationalist even if you aren't the most gregarious person in the room | | | | ▶ | | | | | | |
| Employee Motivation and Engagement in the New World of Work | | | | | ▶ | | | | | |
| Fuel Growth through Vision, Strategy and Innovation | | | | | ▶ | | | | | |
| Leadership Skills: Handling difficult conversations | | | | | | ▶ | | | | |
| Remote and Blended Business Development | | | | | | ▶ | | | | |
| Results and Outcomes: Igniting and managing high performance in a remote environment | | | | | | | ▶ | | | |
| Seven Things Every Leader Needs to be Doing to Grow Their Firms in 2021 | | | | | | | | ▶ | | |
| Building High Functioning Teams | | | | | | | | | ▶ | |
| Delegating Excellence: Keys to growing and capitalizing on your team's resources | | | | | | | | | | ▶ |
| Managing Culture in a Remote Work Environment | | | | | | | | | | ▶ |

# Human Resources

| | May 3 | | May 4 | | | May 5 | | | May 6 | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 12:45 – 1:45 PM | 2:00 – 3:00 PM | 12:15 – 1:15 PM | 1:30 – 2:30 PM | 2:45 – 3:45 PM | 12:15 – 1:45 PM | 2:00 – 3:00 PM | 3:15 – 4:15 PM | 12:15 – 1:45 PM | 2:00 – 3:30 PM |
| Becoming an Inspiring, Difference-Making Coach | ▶ | | | | | | | | | |
| Diversity, Equity, and Inclusion (DEI) Challenges 2021 – Observations from an Expert | ▶ | | | | | | | | | |
| Creating High Performance Teams with Talent Optimization and The Predictive Index | | | ▶ | | | | | | | |
| How HR KPIs Impact the Firm and How to be Strategic About What to Do with Them | | | | ▶ | | | | | | |
| Living Your Firm Values: Using Goals to Increase Employee Engagement | | | | | ▶ | | | | | |
| Building High Functioning Teams | | | | | | | | | ▶ | |
| Managing Culture in a Remote Work Environment | | | | | | | | | | ▶ |

# Digital Transformation

| | May 3 | | May 4 | | | May 5 | | | May 6 | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 12:45 – 1:45 PM | 2:00 – 3:00 PM | 12:15 – 1:15 PM | 1:30 – 2:30 PM | 2:45 – 3:45 PM | 12:15 – 1:45 PM | 2:00 – 3:00 PM | 3:15 – 4:15 PM | 12:15 – 1:45 PM | 2:00 – 3:30 PM |
| Digital Transformation Outlook in the Marketplace | ▶ | | | | | | | | | |
| Technology Update on Digital Transformation Tools | | ▶ | | | | | | | | |
| BDO Tax Performance Engineering: Tax Delivery Model | | | ▶ | | | | | | | |
| Digital Project Case Studies: BDO Alliance Firms and Clients | | | | ▶ | | | | | | |
| The Future of Audit is Here - Part 1: Transforming the Audit with BDO's Digital Suite of Tools | | | | | ▶ | | | | | |
| The Future of Audit is Here - Part 2: A Future Inspired by Innovation | | | | | | | ▶ | | | |

# Client Accounting & Advisory Services (CAAS)

| | May 3 | | May 4 | | | May 5 | | | May 6 | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 12:45 – 1:45 PM | 2:00 – 3:00 PM | 12:15 – 1:15 PM | 1:30 – 2:30 PM | 2:45 – 3:45 PM | 12:15 – 1:45 PM | 2:00 – 3:00 PM | 3:15 – 4:15 PM | 12:15 – 1:45 PM | 2:00 – 3:30 PM |
| Excel Treasure Maps | ● | | | | | | | | | |
| Tips and Tricks for QuickBooks® Online | | ● | | | | | | | | |
| AI in CAAS: What is Your Strategy? | | | ● | | | | | | | |
| What's the Difference Between Financial Accounting and Managerial Accounting? | | | | ● | | | | | | |
| Fuel Growth through Vision, Strategy and Innovation | | | | | ● | | | | | |
| What's a T-Account? | | | | | | ● | | | | |
| Outsourced Accounting Considerations for Nonprofits | | | | | | | ● | | | |
| CAS Practice Success Metrics: KPIs That Drive Results | | | | | | | | ● | | |
| CAS to CAAS: Transitioning from Accounting to Accounting & Advisory | | | | | | | | | ● | |
| | | | | | | | | | | ● |

# Other

| | May 3 | | May 4 | | | May 5 | | | May 6 | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 12:45 – 1:45 PM | 2:00 – 3:00 PM | 12:15 – 1:15 PM | 1:30 – 2:30 PM | 2:45 – 3:45 PM | 12:15 – 1:45 PM | 2:00 – 3:00 PM | 3:15 – 4:15 PM | 12:15 – 1:45 PM | 2:00 – 3:30 PM |
| Professional Ethics Update | | | | | | ● | | | | |

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