



## USF Accounting Circle Conference

# 2020 Vision for the Future of CPAs

May 21-22, 2020

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# **2020 Vision for the Future of CPAs**

## **May 21-22, 2020**

**Virtual Conference: Attend from any computer or mobile device.**

*Internet access required*

<b>Conference Pricing</b>	<b>Individual</b>	<b>Group (5 or more)</b>
Early Bird (by 5/1)	\$275	\$250
Regular (5/2 - 5/18)	\$300	\$275
* Registration includes both days. Transfers and substitutions are not allowable. Cancellations received in writing up to five business days before the conference may receive a full refund.		
* Registration after 5/18 is not available.		

**CPE Credit:** This conference qualifies for up to 12 credit hours (including at least four AA credits), subject to approval by the Florida Department of Business and Professional Regulation.

Learn more and register at [www.usf.to/accounting](http://www.usf.to/accounting)



## **USF Muma**

**College of Business**

Lynn Pippenger School  
of Accountancy

UNIVERSITY of SOUTH FLORIDA

# Day 1 Schedule- May 21, 2020

<b>7:30-8:10</b>	<b>Registration</b> (Participants must sign in at the virtual registration desk both days)
<b>8:10</b>	<b>Welcome</b> <i>Dr. Mark H. Taylor, Director, Lynn Pippenger School of Accountancy</i>
<b>8:15-9:05</b>	<b>Federal Tax Update</b> <i>Paul C. Dunham, Co-Tax Practice Leader, CBIZ MHM, LLC</i>
	This presentation will include a brief overview and highlights of TCJA, SECURE ACT, and other pending federal tax issues.
<b>9:05-9:55</b>	<b>The Fraud Landscape</b> <i>Alexis C. Bell, MS, CFE, Founder &amp; Managing Partner, Fraud Doctor</i>
	Today's fraud risk management programs leave many organizations in perpetual response mode, surprised by each event, and running from one fire to the next. Learn what tomorrow's practitioners do to create a program where they manage the risk for fraud, rather than having it manage them. In this session, myths that keep you running in place will be dispelled. You'll hear how a simple shift in just a few areas can help you begin to gain traction in your ability to manage your risk for fraud.
<b>9:55-10:10</b>	<b>Break</b>
<b>10:10-11:50</b>	<b>What's New in Excel</b> <i>Bill Jelen, Publisher, MrExcel.com</i>
	You use Excel 40 hours a week, but do you really know how to unleash the power of Excel? Learn new features in Excel such as the powerful XLOOKUP, Dynamic Arrays formulas that can SORT, FILTER, or provide UNIQUE values. Unlock artificial intelligence that allows you to ask Excel questions about your data. Don't be tortured by bad data any longer.
<b>11:50-12:40</b>	<b>Lunch on your own</b>
<b>12:40-1:30</b>	<b>Future Consumer Now: How Data and AI are Redefining the Consumer Experience</b> <i>Patrick J Moriarty Ph.D., Managing Director, Commercial Analytics, EY</i>
	This session will provide an overview of the increasing interdependence of digital technology, the consumer data ecosystem, analytics and the consumer experience with a perspective on near-term and long-term commercial implications.
<b>1:30-2:20</b>	<b>Organizational Change from the Inside Out: Use Neuroscience to Propel your Organization Forward</b> <i>Dr. Heather Collins, Ph.D.</i>
	Change can be difficult. Some people are resistant to organizational change whereas others jump in with both feet. Discover the neuroscience behind change resistance, change acceptance, and how you can use brain science to initiate meaningful organizational change.
<b>2:20</b>	<b>End of Day 1</b>

## Day 2 Schedule- May 22, 2020

7:30-8:10	<b>Welcome</b>
8:10	<b>Registration</b> (Participants must sign in at the virtual registration desk both days)
8:15-9:05	<b>Cyber Risk Awareness: Understanding the Threat and Doing Your Part</b> <i>Rob Goldberg, Principal, Deloitte &amp; Touche LLP</i>
	Learn about the current cybersecurity threat landscape, including the impacts from cybercrime, phishing, ransomware, and business email compromise. Do your part by not becoming a victim by learning about password leading practices and data protection leading practices.
9:05-9:55	<b>Recent Trends in Audit: What You Need to Know for the Next Decade</b> <i>Cindy Fornelli, former Executive Director of the CAQ</i>
	This session will cover ESG Reporting and the auditor's role, how technology will continue to shape the audit, the talent crunch, and what the 2020 election might mean for regulated entities.
9:55-10:10	<b>Break</b>
10:10-11:00	<b>Path to a Conceptual Framework</b> <i>Christine A. Botosan, PhD, CVA, CPA (Canada)</i>
	A robust conceptual framework helps accounting standard setters develop good solutions to tough financial reporting problems. Christine will share her thoughts on an integrated conceptual framework for financial reporting.
11:00-11:50	<b>How to Build Value of a Business and Top Deal Killers</b> <i>Emery Ellinger III, Chief Executive Officer, Aberdeen Advisors, Inc.</i>
	This session will provide an update on the M&A market, detail the value drivers in business valuation, and explore the top due diligence issues.
11:50-12:40	<b>Lunch on your own</b>
12:40-1:30	<b>The Future of IT</b> <i>David Tarabocchia, Managing Director, CIO Advisory, KPMG LLP</i>
	This session will explore today's current IT landscape and the ways that IT can drive business strategy in the future to evolve the model so that products and services can be delivered at market speed and scale.
1:30-2:20	<b>Dynamic Risk Assessment: Utilizing a Heuristic Algorithm in your Risk Assessment</b> <i>Derek Southard, CPA, Director – Internal Audit, Bristol Myers Squibb and John Barbieri, Associate Director – Global Process Owner, Bristol Myers Squibb</i>
	Learn about Bristol Myers Squibb's journey in creating a Heuristic Algorithm to automate their balance sheet account risk assessment through the use of machine learning, internal and external data, and Tableau®.
2:20	<b>End of conference - Thank you for attending! Hope to see you in person again next year: May 20-21, 2021</b>

## Day 1 Speakers



*Paul C. Dunham, Co-Tax Practice Leader, CBIZ MHM, LLC*

Paul has over 30 years of experience in public accounting, including time spent with a Big Four accounting firm, serving both public and privately held companies on a wide range of tax issues. Paul has represented clients before the Florida Department of Revenue and most notably, the Internal Revenue Service national office in Washington, D.C.

*Alexis C. Bell, MS, CFE, Founder & Managing Partner, Fraud Doctor*

Alexis is the founder & managing partner of Fraud Doctor LLC. She helps companies better understand and manage their risk from fraud. She is driven by the fact that every asset lost due to fraud is one less resource that could be used to achieve objectives. The ultimate goal is to protect organizations from fraud and assure funds can remain within (prevention) or return to (response) the organization for the original intended purpose of accomplishing the mission.



*Bill Jelen, Publisher, MrExcel.com*

Bill Jelen is the author of 61 books about Microsoft Excel and the host of MrExcel.com. He has made over 80 guest appearances on TV's Call for Help with Leo Laporte. Bill will entertain you while showing you the powerful tricks in Excel. Before founding MrExcel.com in 1998, Jelen spent twelve years "in the trenches", as a financial analyst for the accounting, finance, marketing, and operations departments of a publicly held company.

*Patrick J Moriarty Ph.D., Managing Director, Commercial Analytics, EY*

Patrick has experience in the realm of digital transformation, marketing productivity and commercial excellence. He has worked with a diverse set of companies across the Retail, Technology and Media sectors providing insights and thought leadership on digital experience, marketing, retail performance & consumer behavior. He has spoken at numerous industry associations and has contributed to features on ABC News, NPR and The Financial Times. His thought leadership efforts have been recognized with awards from industry firms, the ARF and AMA.



*Dr. Heather Collins, Ph.D.*

Heather Collins, Ph.D., is a Cognitive Neuroscientist and speaker with expertise in how the brain learns, remembers, and thinks about information. She shows business professionals how to become power thinkers, create organizational change, and effectively lead teams through brain science. She has given three popular TEDx talks and has authored 30+ scientific publications in academic journals, such as the New England Journal of Medicine as well as popular press articles on applying cognitive neuroscience research to professional and academic settings.





## Day 2 Morning Speakers



*Rob Goldberg, Principal, Deloitte & Touche LLP*

Rob is a principal with Deloitte, providing cyber risk services to clients across the Consumer Business industry. Rob leads Deloitte's cyber practice for the retail, wholesale, and distribution industry sector, and has twenty-five years of experience in cyber risk management and information technology. In addition to Rob's broad industry experience in professional services, Rob has in-depth knowledge of the retail industry, having worked for many years as the Global Vice President of Audit for Technology and eCommerce Audit at Walmart.

*Cindy Fornelli, former Executive Director of the CAQ*

Cindy Fornelli is an independent director of TriplePoint Venture Growth BDC Corp and sits on the Advisory Council of the USF Lynn Pippenger School of Accountancy. Fornelli served as the Executive Director of the Center for Audit Quality from its inception in 2006 until June 2019. Prior to that she was the Regulatory and Conflicts Management Executive at Bank of America. Before joining Bank of America, Fornelli was Deputy Director of the Division of Investment Management of the U.S. Securities and Exchange Commission (SEC). Fornelli is a graduate of Purdue University and received her JD at The George Washington University.



*Christine A. Botosan, PhD, CVA, CPA (Canada)*

Christine Ann Botosan joined the Financial Accounting Standards Board (FASB) on July 1, 2016. Ms. Botosan has a broad knowledge of accounting issues, with particular expertise in the areas of financial statement analysis and valuation. A certified valuation analyst and a chartered professional accountant of Canada, Ms. Botosan received her Ph.D. in business administration from the University of Michigan and a bachelor's degree in business administration from Wilfrid Laurier University in Ontario, Canada. Prior to joining the FASB, Ms. Botosan was the George S. and Dolores Dore Eccles Presidential Chair in Ethical Financial Reporting at the David Eccles School of Business at the University of Utah, where she also served as associate dean of graduate affairs.



*Emery Ellinger III, Chief Executive Officer, Aberdeen Advisors, Inc.*

Emery is the CEO of Aberdeen Advisors, Inc., an M&A Advisory firm he founded after having built and sold his own multi-million-dollar marketing company. Emery has expertise in all areas of M&A Advisory practice and has successfully completed hundreds of transactions, including mergers, acquisitions, divestitures, and financings. From the typical transaction to the highly complex deal, Emery has repeatedly been recognized as a leading mergers and acquisitions executive in the Florida market and is well known throughout the South for his ability to connect ideal buyers with sellers.



## Day 2 Afternoon Speakers



*David Tarabocchia, Managing Director, CIO Advisory, KPMG LLP*

David Tarabocchia is a managing director in KPMG's management consulting practice, based in Tampa and specializing in CIO advisory services. He is the U.S. lead for KPMG's IT integration & separation services as well as the global lead for KPMG's IT advisory services in hospitality. David's clients include some of the leading companies in the media, entertainment and hospitality industries. David was recognized as one of the 35 Under 35 Rising Stars of the Profession by Consulting Magazine and as an Outstanding Young Alumnus of the Year for the Hough Graduate School of Business.

*Derek Southard, CPA, Director – Internal Audit, Bristol Myers Squibb*

Derek Southard is currently a Director in the Global Internal Audit & Assurance team at Bristol Myers Squibb. Derek oversees integrated audit engagements, including special projects, management requests, investigations, and due diligence, through planning, execution, and reporting. Derek's prior role within Bristol Myers Squibb included leading US general accounting operations, providing support for US Pharmaceuticals, Global Manufacturing Supply, R&D, and Corporate Functions.



*John Barbieri, Associate Director – Global Process Owner, Bristol Myers Squibb*

John Barbieri is currently the Associate Director and Global Process Owner for Record to Report organization at Bristol Myers Squibb; for the last 8 years he has had responsibilities as the Regional Process Lead for the Americas. In his role he oversees the systems and processes for record to report and is the subject matter expert in balance sheet processes. John has spent the last 19 years at Bristol Myers Squibb and has worked in many business units outside of Finance which include Global Procurement, Human Resources, and Information Technology.



**Thank you for  
attending!**

**Hope to see you  
(in person)  
again next year:**

**May 20-21**

**Stay safe and  
healthy.**