



USF Accounting Circle Conference May 20-21, 2021

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USF Accounting Circle Conference

May 20-21, 2021

Virtual Conference: Attend from any computer or mobile device.

Internet access required

<i>Conference Pricing</i>	<i>Individual</i>	<i>Group (5 or more)</i>
Early Bird (by 5/2)	\$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 credits, subject to approval by the Florida Department of Business and Professional Regulation.

Program Level: Overview/Update

Program Prerequisites: None. No advance preparation needed.

Attendance Requirements: Participants will log on to each session and are required to answer a minimum of three polling questions per 50-minute session.

Delivery Method: Group Internet Based

Learn more and register at www.usf.to/accounting



USF Muma

College of Business

Lynn Pippenger School
of Accountancy

UNIVERSITY of SOUTH FLORIDA

Day 1 Schedule- May 20, 2021

7:30-8:00 Login to the Virtual Conference Platform	
8:00	Welcome <i>Dr. Mark H. Taylor, Director, Lynn Pippenger School of Accountancy</i>
8:15-9:05	Environmental, Social, Governance (ESG) <i>Katherine Blue, Principal, KPMG LLP</i>
	This presentation will provide an understanding of why ESG matters, what it looks like, and how it connects to long-term performance. (1 AA credit)
9:10-10:00	Retirement Planning for Your Business: How to address your long-term goals and the goals of your employees <i>William P. Caskey, Jr., Senior Vice President, Wealth Management Advisor, Merrill Lynch Wealth Management</i>
	What is the best retirement plan vehicle for your business? Do you need a pickup truck, a dump truck or a tractor trailer? Will Caskey will provide a quick walk through of the entire spectrum of retirement plans available to business owners from SEP's to 401K's through Profit Sharing Plans. (1 TB credit)
10:00-10:15 Break	
10:15-11:15	Leadership in a Time of Uncertainty: A CEO Perspective
Keynote	<i>Joe Ucuzoglu, Chief Executive Officer, Deloitte US</i>
	More than one year later, the pandemic and economic impacts of the public health crisis and societal issues have fundamentally redefined key elements of leadership across the business landscape. This session will cover a CEO perspective on some of the trending issues facing business leaders today, including the role of trust and purpose in business; the regulatory environment and its impact on the accounting profession and business more broadly; how the acceleration of advanced technologies are shaping and impacting the profession; as well as the critical importance of diversity, equity, and inclusion as a strategic imperative and how all of this will continue to shape the future of work and the overall profession. (1 BEH credit)
11:20-12:10	Developing Your Superpowers: Building Empathy & Resilience for Success at the Office and Beyond <i>Russell Clayton, Ph.D., Instructor of Business Administration, Muma College of Business, University of South Florida</i>
	In this session we will look at two superpowers – empathy & resilience – to discover how they can make a positive impact in the workplace and beyond. Participants will take a brief self-assessment to discover their current level of these superpowers and learn strategies that can be implemented immediately in order to increase these superpowers. (1 BEH credit)
12:10-1:00 Lunch Break	
1:00-1:50	Emerging Technologies that are Transforming Accounting and Fraud Prevention
	<i>Derek Kolano, CPA, Vice President of Internal Audit, Bloomin' Brands, Inc.</i> <i>Phil Pace, Group Vice President and Controller, Bloomin' Brands, Inc.</i>
	Learn how Bloomin' Brands is utilizing data analytic tools to enhance its fraud risk management program and leveraging Robotic Process Automation to drive efficiency in its accounting and shared services functions. (1 AA credit)
2:00-2:50	US Federal Legislative Update <i>Bob Schellhas, Principal, Washington Council EY</i> <i>Lauren Soltani Rubin, Manager, Washington Council EY</i>
	The Biden Administration and Congress have a bold agenda for spending and taxation in 2021 to address Covid and US economic concerns. This discussion will highlight the politics and policies for the Federal legislative process in the coming year. (1 TB credit)
3:00 End of Day 1	

Day 2 Schedule- May 21, 2021

7:30-8:00 Login to the Virtual Conference Platform	
8:00	Welcome <i>Andrew Menendez, Chair, Accounting Circle CPE Conference Committee</i>
8:15-9:05	Rise of SPACs <i>Sean Denham, National SPAC Leader, Office Managing Partner, Philadelphia, GT</i>
	Learn about the current surge in the Special Purpose Acquisition Company (SPAC) market. (1 AA credit)
9:10-10:00	Financial Analysis in a Regulated World <i>Jeff Chronister, VP of Finance, Tampa Electric and TECO Energy</i>
	Jeff has a wealth of knowledge of the utility industry as well as overall financial success. In his 35 years in the regulated industry he has found the right balance of managing financial performance and planning strategically to achieve overall success for the organization, employees, customers, and shareholders. (1 AA credit)
10:00-10:15 Break	
10:15-11:05	Case Studies in Cybersecurity – A Primer for Small and Midsized Businesses (SMB) <i>Ray Gandy, GCCC, MBA, Director, IT Risk & Security, CBIZ MHM, LLC</i>
	Cybersecurity is a concern for everyone and is becoming increasingly so for small and midsized businesses (SMBs). Most SMBs, however, wouldn't feel comfortable describing what cybersecurity means to their organization because so often it feels like a foreign subject. Often times, the responsibility lies with an IT manager or an outsourced IT managed service provider. In this session, we will cover real-life examples of how SMB leadership have taken ownership for knowing and managing their cybersecurity risk. (1 TB credit)
11:10-12:00	U.S. Economy – Resiliency & Recovery <i>Laura Dietzel, Partner, Real Estate Senior Analyst, RSM US LLP</i>
	The data suggests that the best of the market recovery is still to come – join us as we dive into the drivers of the robust growth that we expect to define the economy in the second half of 2021. Our discussion will focus on the macro-economic drivers and legislative backdrop impacting US markets. (1 TB credit)
12:00-1:00 Lunch Break	
1:00-1:50	The Ever-Changing Work Environment <i>Lynn Beck, CPA/CCIFP, Kerkering Barberio & Co.</i>
	This session will provide some insights into how firms and their staff pivoted during Covid-19 to a more remote environment. Learn some practices that worked and some that didn't. You will get some tips on how to keep everyone engaged, all while being productive and continuing to grow and be successful. (1 BEH credit)
2:00-2:50	Making Agile More than a Buzzword: Learn How PwC Embraced Agile in Finance <i>Cindy S. Cruz, CPA, idea2innovation Director, PwC</i> <i>Victoria Motes, CISA, idea2innovation Senior Manager, PwC</i>
	Agile is an approach and mindset that helps teams deliver value faster and allows for greater innovation and efficiency. While it is often thought of as a way of working for IT shops, more Finance organizations are adopting it and finding it effective in prioritizing highest value work, driving transparency and enabling greater governance. In this session, you'll learn the essential tools to implement an Agile approach in Finance and how Agile ways of working have become ingrained in PwC's culture. (1 TB credit)
3:00 End of Day 2	

Keynote Speaker:

Joe Ucuzoglu



Joe Ucuzoglu is the Chief Executive Officer, leading the largest professional services organization in the United States. With more than 100,000 professionals, Deloitte provides audit and assurance, tax, consulting, and risk and financial advisory services to a broad cross-section of the largest corporations and governmental agencies.

Joe is actively engaged with clients, ensuring we are consistently delivering the full breadth of Deloitte. He frequently speaks on current issues such as building a culture of purpose and inclusivity, the regulatory landscape, and the role businesses play in leading society through technology-driven change.

Previously, Joe has held several leadership roles in the firm, including leading Deloitte's Audit & Assurance practice in the United States and serving as the national managing partner for government, regulatory, and professional matters. Earlier in his career, Joe served as senior advisor to the chief accountant at the Securities and Exchange Commission.

Joe serves on the governing board of the Center for Audit Quality, the board of the Partnership for New York City, and the Board of Councilors of the University of Southern California Marshall School of Business. He is a member of the Fortune CEO Initiative, the CEO Action for Diversity and Inclusion, and the Committee on Capital Markets Regulation.

Joe received a BS in Accounting from the University of Southern California.

Deloitte.

Day 1 Speakers



Katherine Blue, Principal, KPMG LLP

Katherine Blue is a Principal at KPMG LLP and is KPMG's Americas Sustainability Services Network Leader. She has over 20 years of advisory experience focused on corporate social responsibility (CSR) reporting strategy, ESG advisement, and EHS regulatory compliance. She also manages KPMG's services including strategy development for CSR reporting and assurance, carbon/energy management, social impact assessment, and non-financial valuation services. As part of KPMG's global energy practice, she serves clients in the power utility and oil and gas industries and leads KPMG's southeast Major Projects Advisory services. Katherine and her husband Doug are the proud parents of two children, Ava and Drake. Katherine is also the Co-Chair of the Atlanta Chapter of Women Corporate Directors.

*William P. Caskey, Jr., Senior Vice President, Wealth Management
Advisor, Merrill Lynch Wealth Management*

Will Caskey is a Wealth Management Advisor with Merrill Lynch based in Augusta, Georgia. He graduated from Georgia Tech and served as a US Army officer for 7 years before returning to his hometown to join Merrill Lynch in 1995. While in the military he served in several assignments in Europe, Central America and the Middle East to include Desert Storm. He is a reformed marathoner and Ironman triathlete. He is a licensed skydiver, private pilot and boat captain. He volunteers with the US Coast Guard as part of the Auxiliary Aviation program in support of Air Station Savannah Georgia assisting with maritime patrols and search and rescue efforts in coastal SC, GA and north FL.



*Russell Clayton, Ph.D., Instructor of Business Administration, Muma
College of Business, University of South Florida*

Russell Clayton is an instructor in the Muma College of Business teaching MBA courses on managerial communication and organizational behavior. In addition, he is a workshop facilitator and work-life effectiveness coach. Dr. Clayton's research has been published in the Harvard Business Review and has been mentioned in such popular press outlets as NBC News, Fox News, Psychology Today, and Fast Company. Dr. Clayton has been recognized for his contributions in the classroom by being awarded the "Mid-Career Distinguished Educator" award by MOBTS. In addition to teaching in the college classroom, he has had the privilege of leading workshops for several organizations, ranging from Fortune 500 companies to non-profits and professional organizations.

Day 1 Speakers



Derek Kolano, CPA, Vice President of Internal Audit, Bloomin' Brands, Inc

Derek Kolano oversees the internal audit function at Bloomin' Brands, Inc., headquartered in Tampa, Florida. Bloomin' is one of the largest casual dining restaurant companies in the world, with a portfolio of four differentiated restaurant concepts: Outback, Carrabba's, Bonefish and Fleming's. He has over 25 years of internal audit, public accounting and consulting experience covering operations, compliance, risk and finance. He began his career in the Detroit office of EY and has worked subsequently in automotive, homebuilding and consumer products. He holds both bachelor's in accounting and MBA degrees from Michigan State University.

Phil Pace, Group Vice President and Controller, Bloomin' Brands, Inc.

Phil Pace is the Controller of Bloomin' Brands, Inc., one of the largest casual dining restaurant companies in the world, with a portfolio of four differentiated restaurant concepts: Outback, Carrabba's, Bonefish and Fleming's. Phil joined Bloomin' Brands in 2007 and was appointed Controller in 2015. He is responsible for the Company's global accounting & reporting functions, as well as Treasury and Risk management. Previously, Phil worked for Arthur Andersen and EY, where he rose to the level of Senior Manager. Phil holds both a Bachelor's in accounting and a Master of Accountancy from USF and is a Certified Public Accountant.



Bob Schellhas, Principal, Washington Council EY

Bob provides US government monitoring, strategy and lobbying services to corporations, trade associations and single-issue coalition groups. He is highly experienced in the legislative and political process, and has focused on a wide range of issues, including banking, insurance, retirement and tax. Bob has extensive experience on Capitol Hill and political campaigns. Bob was co-editor of The New York Times and The Washington Post best seller, *Contract with America: The Bold Plan* by Reps. Gingrich, Armey and House Republicans to Change the Nation. Bob has a BS degree in Political Science and Economics from Central Michigan University.



Lauren Soltani Rubin, Manager, Washington Council EY

Lauren is a member of the Washington Council Ernst & Young (WCEY), a group within Ernst & Young LLP where she focuses on tax policy issues and provides guidance on legislative procedure and strategy in the US House of Representatives. Prior to joining (WCEY), Lauren spent several years on Capitol Hill, where she managed a team of policy staff and advised a member of Congress on tax and technology policy. Lauren is also a political campaign veteran. Lauren holds a BA in International Politics from the George Washington University and a JD from Villanova University.



Day 2 Speakers



Sean Denham, National SPAC Leader, Office Managing Partner, Philadelphia, GT

Sean Denham is the National Special Purpose Acquisition Company (SPAC) Leader, as well as, the Global and US Services Industry Leader. Locally, Sean is the Office Managing Partner (OMP) for Grant Thornton's Philadelphia office. As OMP, Sean has the privilege of leading an exceptional team of high-performing individuals in the Philadelphia region who provide top tier accounting, advisory and tax services for our clients. As an audit partner of the firm, Sean serves some of Grant Thornton's most prominent clients including public and private companies in the professional services industries. Sean is a Certified Public Accountant and earned a Bachelor of Science Degree in Accounting from Lehigh University.

Jeff Chronister, VP of Finance, Tampa Electric and TECO Energy

Jeff Chronister is vice president of Finance, where he leads a team of professionals responsible for accounting, financial reporting and business planning for Tampa Electric and TECO Energy. Chronister has served in several leadership roles in his more than 30 years at TECO, including as Tampa Electric's controller. A Certified Public Accountant since 1983, Chronister has a Bachelor of Business Administration in Accounting from Stetson University. He is a member of the American Institute of CPAs and the Florida Institute of CPAs. Chronister has served many community organizations, including the Shriners Hospital for Children and local Little League organizations. He is also an alumnus of both Tampa Connection and Leadership Tampa.



Ray Gandy, GCCC, MBA, Director, IT Risk & Security, CBIZ MHM, LLC

Ray is a Director and Leader of the IT Risk & Assurance Practice at CBIZ & MHM. He has been a CIO, IT Security Lead, and Director of IT Audit for a Fortune 50 global Aerospace and Defense manufacturer. His IT leadership expertise encompasses the areas of security & controls, strategy, infrastructure, applications, and finance. Ray's experience includes developing and implementing strategic plans, executing large-scale integrations, improving operations, optimizing quality, strengthening security, controlling costs, and ensuring customer satisfaction. He leads teams performing cyber risk assessments, security control gap analysis, remediation road maps, and reporting and monitoring. Ray has experience across a wide variety of market segments including; NFPs, Colleges and Universities, Private Equity, Manufacturing, and Biotech firms.

Day 2 Speakers



Laura Dietzel, Partner, Real Estate Senior Analyst, RSM US LLP

Laura specializes in providing real estate audit and consulting matters for privately held companies and private equity funds specializing in real estate. Since joining RSM, she has worked with commercial, residential, retail, hotels and real estate opportunity funds, as well as performed due diligence services for real estate funds and various lenders in the real estate conduit markets. Laura has fifteen years of experience in real estate and public accounting, and has developed and presented multiple continuing education courses in the real estate industry. In 2018, she was selected as a senior analyst in RSM's cutting edge Industry Eminence Program, which positions its senior analysts to understand, forecast and communicate economic, business and technology trends shaping the industries RSM serves. Laura's analysis and research on the real estate markets have been routinely published and shared in the media.

Lynn Beck, CPA/CCIFP, Kerkerling Barberio & Co.

Ms. Beck is a Tax Manager, and her primary areas of practice are in business and individual taxation, with a focus on construction and real estate tax. She joined Kerkerling, Barberio & Co. in 2018. Ms. Beck graduated from Bryant College with her B.S. in Accounting. She is a member of Institute of Certified Construction Industry Financial Professionals, Construction Financial Management Association (CFMA), Leading-Edge Alliance Special Interest Group – Construction, Gulf Coast Builders Exchange (GCBX), Florida Institute of CPAs (FICPA), and the American Institute of CPAs (AICPA).

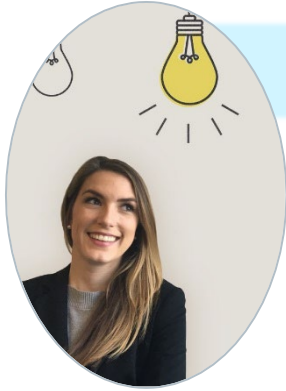


Cindy S. Cruz, CPA, idea2innovation Director, PwC

Cindy is a Director in PwC Finance, leading the idea2innovation (i2i) team which is at the forefront of transformational change at PwC, delivering, enabling and advising teams to reimagine the possible. The i2i team utilizes business process improvement, Agile ways of working and a 'people centered culture' to create sustainable and forward-thinking transformation. Cindy's 15 years of experience have centered around external/internal auditing, higher-ed academics, innovation, strategy, Agile delivery and finance transformation. She is a skilled facilitator that leverages human centered design and lean six sigma principles to ensure teams are successful at providing services/products that exceed expectations. Cindy received her Master of Accountancy from the University of South Florida and Bachelor of Science in Accounting from Florida State University. She is a Certified Public Accountant in Florida.



Day 2 Speakers



Victoria Motes, CISA, idea2innovation Senior Manager, PwC

Victoria is a skilled facilitator, continuous learner, and avid change agent offering over seven years of experience in Human Centered Design, UX, Agile ways of working, process improvement, automation strategy, IT risk management, and communications. She is a Senior Manager in PwC's idea2innovation (i2i) team within PwC's Business Services and currently helps PwC's Finance function reimagine its delivery model and shift toward an Agile way of working. I2i enables teams to not only understand and improve their processes, but helps groups drive change, and more importantly, create lasting value for their customers. With an eclectic background in journalism, IT risk management, and strategic improvement, Victoria has found that diversity of thought and ideas typically lead to the most interesting, impactful solutions. She values the power of people and teamwork and has seen first-hand that enabling people to lead at all levels results in long-term success. Victoria received her Master of Science in Information Systems and Operations Management and her Bachelor of Arts in Journalism from the University of Florida. She is a Certified Information Systems Auditor (CISA), and prior to her role at PwC, she was part of KPMG's Advisory practice with a focus in IT Risk Management.



Thank you for attending!

We hope to see you in person
next year!

Save the dates:

May 19-20, 2022