

# ELEVATE

*TAKE YOUR LEARNING TO THE NEXT LEVEL*

WEDNESDAY, JUNE 30, 2021  
LIVE WEBCAST

We focus on providing solutions to, and increasing resilience for, CPAs, firms and their clients in times of change. Incorporating today's realities, tomorrow's possibilities and increasing your competencies in areas from audit and current affairs to management and technology while you earn up to 8 CPE credits, including 5 A&A.

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**MICPA**

MICHIGAN ASSOCIATION OF  
CERTIFIED PUBLIC ACCOUNTANTS

## Take your learning to the next level.

Four tracks of carefully curated sessions incorporate the best of the best speakers and topic submissions.

### PROGRAM OUTLINE & DETAILS:

Product ID: 116852  
Registration: 7:30am  
Start Time: 8:00am  
Adjournment: 4:30pm  
Bonus Hour: 4:40pm – 5:30pm

### Register by June 2 to take advantage of the best price!

Please note, discounted pricing is already reflected in the online price. No promo code is needed.

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**\$309 NON-MEMBERS**

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Up to  
8 hours of  
CPE for less  
than \$20  
per credit  
hour!

## AGENDA

**8:00 – 8:05 A.M.**  
**WELCOME & OPENING REMARKS**

**8:05 A.M. - 8:55 A.M.**  
**KEYNOTE PRESENTATION**

**GO FROM CHAOS TO COHERENCE  
IN 3.5 SECONDS**

Take personal resilience to the next level as we increase the effectiveness of your work interaction strategy and address the impacting factors to engagement and work-related stress that contribute to retention and productivity issues.

Kristine Conway, MS, PCC – President, Effective Focus, Inc.

**9:00 A.M. - 9:50 A.M.**

**MICHIGAN SPECIFIC ETHICS 2019-21 EDITION -  
THE IMPACT OF STATE STATUTE &  
ADMINISTRATIVE RULES ON YOUR  
CPA LICENSE^**



Christopher J. Harper, CPA, MBA – Director of Education, Hungerford Nichols CPAs + Advisors, and Instructor, Grand Valley State University Seidman College of Business

**FASB UPDATE\***

Joann Cross, CPA, CMA, CGFM, CGMA – Emerti Professor

**FUTURE NEEDS OF SMALL BUSINESSES**

Kalliopi Vlastos – General Manager, Dext

**EQ: WHERE THE RUBBER MEETS THE ROAD!**

Jaclyn Badeau, CPA, CGMA, MBA, EQ Certified – President, Badeau Consulting, LLC

**10:00 A.M. - 10:50 A.M.**

**TRANSITION PLANNING  
(OR THE LACK THEREOF)**

Joseph Bione – President/Owner, Whitehall Group, LLC

**BYE-BYE BIAS: THE PRINCIPLES OF CREATING A  
BIAS FREE WORKSPACE (Double Session)**

Jamar Cobb-Dennard, JD – Business Broker, Indiana Business Advisors

**INCOME TAX DEFERRAL FOR TAXPAYERS WHO  
ANTICIPATE SELLING APPRECIATED ASSETS  
WHILE LIVING \* 0**

Jerry Hesch, JD, MBA – Director Notre Dame Tax & Estate Planning Institute, University of Norte Dame Law School

**VIRTUAL LEADERSHIP: ENGAGING FULLY AND  
ONBOARDING EFFECTIVELY**

Kristen Schmitt – President, Thrive to Lead, LLC

**11:00 A.M. - 11:50 A.M.****PRACTICAL IMPLEMENTATION OF LEASE ACCOUNTING\***

Duane M. Reyhl, CPA, CGMA – Partner, AHP

**BYE-BYE BIAS: THE PRINCIPLES OF CREATING A BIAS FREE WORKSPACE (Double Session Continued)**

Jamar Cobb-Dennard, JD – Business Broker, Indiana Business Advisors

**INTERACTIVE VIRTUAL LAB: HOW TO UNLEASH YOUR EMPLOYEES' CREATIVITY USING LESSONS FROM THE MOST CREATIVE PEOPLE IN HISTORY**

Ralph Gaillard, M.Ed. – CEO and Chief Learning Architect, The Adele Learning Lab, LLC

**NFTS AND DIGITAL BLOCKCHAIN ASSETS**

Greg Soule, CPA, CISA, CISSP, CFE – Partner, Andrews Hooper Pavlik PLC

**11:50 A.M. - 12:40 P.M.  
LUNCH BREAK****12:40 P.M. - 1:30 P.M.****BYOB: BUILD YOUR OWN BUDGET\***

Lucas LaChance, CPA, CIA – Partner, Lane Gorman Trubitt, LLC

**TELECOMMUTER TAX IMPLICATIONS IN THE TIME OF COVID<sup>⊖</sup>**

Nikolaos Arhos, Esq., LL.M. – Senior Manager, Employment Tax Advisory Practice, EY

**ADDED VALUE: CLIENTS WANT ACCOUNTANTS WHO ADD VALUE TO THEIR ORGANIZATION!**

JaJuan Williams, CPA, MBA – The Lady CFO

**REDUCING RISK AND EXPOSURE TO EMPLOYEE CLAIMS**

Mark R. Filipp, JD - Shareholder and Director, Kemp Klein Law Firm

**1:40 P.M. - 2:30 P.M.****ETHICAL RESILIENCE IN TIMES OF CHAOS AND CHANGE<sup>^</sup>**

Clare Levison, CPA, CGMA – Owner, Inspired Responsibility

**CRYPTOCURRENCY FRAUD & FORENSICS\***

Mark DiMichael, CPA/CFF/ABV, CFE, CCFI – Partner, Citrin Cooperman

**MINDSET MATTERS**

Lisa Roach, MM, PMP, DTM – President, Wisdom Consulting

**CHAPTER 11 BANKRUPTCY - THE NEW SUBCHAPTER V OPTION - A VALUABLE TOOL FOR SMALL BUSINESSES**

Greg Ekdahl, JD – Partner, Keller & Almassian, PLC

**2:40 P.M. - 3:30 P.M.****THE NEW NORMAL: UNPACKING CHANGES TO AUDIT RISK\***

Kate Farwell, CPA, CFE – Manager, Andrews Hooper Pavlik PLC

Greg Soule, CPA, CISA, CISSP, CFE – Partner, Andrews Hooper Pavlik PLC

**USING THE “F” WORDS - FINAL WISHES, FUNERALS AND FINANCES**

Mike Smela, MA – Financial Educator, NFI Hunters, Inc

**CRITICAL DIVORCE TAX ISSUES IN A POST-COVID WORLD<sup>⊖</sup>**

Jaqueline Roessler, CDFA – Divorce Financial Planner, Center for Financial Planning

Kali Hassinger, CFP, CDFA – Financial Planner, Center for Financial Planning

**SHAWSHANK REDEMPTION: A CASE STUDY IN STRESS MANAGEMENT**

Liz Wiggins, MS, LLP, CPC – Principal, Transitions Training LLC

**3:40 P.M. - 4:30 P.M.****NUTS & BOLTS OF CRYPTOCURRENCY TAXATION<sup>⊖</sup>**

Shehan Chandrasekera – CoinTracker

**WHAT TO KNOW ABOUT ANNUITIES<sup>≈</sup>**

Carlos Dias Jr. – President/CEO & Financial Advisor, Dias Wealth, LLC

**LEADERSHIP TESTS AND TRIUMPHS: LEADING IN A PANDEMIC AND BEYOND**

Erin Daiber, CPA, PCC – Founder, Well Balanced Accountants, LLC

**WHAT'S NEW IN THE MICROSOFT 365 VERSION OF EXCEL**

David Ringstrom, CPA – President, ProfessionalsExcel

**4:30 P.M.****ADJOURNMENT & BONUS HOUR REGISTRATION****4:40 P.M.****BONUS HOUR BEGINS****5:30 P.M.****BONUS HOUR ADJOURNS**

\* Qualifies for Accounting & Auditing (AA) CPE hours

<sup>^</sup> Qualifies for Ethics (ET) CPE hours

≈ Qualifies for Certified Financial Planner (CFP) credit

⊖ Qualifies for IRS continuing education credit





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