



# Women Who Count

## 2018 NATIONAL CONFERENCE

October 28-30, 2018

Kansas City, MO | The Westin Crown Center

Yes, you count numbers, dollars,  
sales, income and expenses.  
But you also count because you  
make a difference. As a woman in  
accounting and finance you empower  
businesses to succeed, you educate  
clients to manage finances, and  
you guide employers to take  
care of employees.

*You count more*

Celebrating 80 years of AFWA

# 80<sup>th</sup>

*anniversary*



Accounting & Financial Women's Alliance

CONNECT • ADVANCE • LEAD

# 2018 NATIONAL CONFERENCE VOLUNTEERS

## Conference Committee

Conference Chair: Shelby Williams

Aneita Remus	Lindsey Barth	Laura Mangan
Andrea Wilt	Megan Mallen	Lori Kelley
Charla Bushkofsky	Erika Nelson	Pam Wenner
Chelsea Sheahan	Ericka Sander	Karyn Hartke
Jeri Ann Farley	Jill Hammond	Mary Lou Carver
Katie Minion	Barbara Covington	

## Foundation Fundraising Committee

Chair: Gale Kreitzberg

Stacey Craig	Mary Lou Carver	Jessica Perkins
Michelle Venus	Melody King	Kris Culliton
Christie Lininger	Melissa Sager	Bambi Weber
Renee Richards	Barbara Covington	Pam Wenner

## AFWA Headquarters Staff

Cindy Stanley, Executive Director  
Debi Williams, Director of Operations  
Lisa Stephenson, Director of Events  
Yolanda Kennison, Project Coordinator  
Rachel Gates, Member Services and Conference Registration

## *In this Program:*

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Welcome to the AFWA Women Who Count National Conference and welcome to Kansas City, home of jazz and bbq! We return to the Midwest and Kansas City to celebrate our organization's 80th year! I'm pleased to welcome you to our host hotel, the beautiful Westin Crown Center.

We begin our conference again this year with AFWA Day. As we look back and celebrate our organization's and members' milestones at the Annual Business Meeting, we also strive to equip our chapters and provide leaders with the tools to inspire and succeed during the AFWA Leadership Sessions. Our afternoon sessions include the "AFWA Chapter Achievement Panel Discussion" and "Chapter Leader Roundtables" where you will be able to collaborate with fellow members. Sunday afternoon also kicks off our Educational Sessions. Make sure to download the Conference App and consult your conference guide for all your options. I hope you plan to join us for the opening reception and networking!

Our three-day conference offers a schedule of 30+ sessions covering accounting, auditing, taxation, operations, financial management, technology, leadership training, and best practices! With over 21 hours of CPE available, the hourly cost is less than \$35. Our diverse speaker line-up includes professionals from industry, private practice, academia and philanthropic organizations. Make sure to let them know how much they are appreciated!

We would not enjoy the level of success we do, if not for our Corporate Partners, Sponsors and Exhibitors and I personally want to thank them for their support of our organization and this conference. Please be sure to go by and visit with them between sessions and at the Opening Reception. Their contributions make our conference more interesting and they provide the tools that help us excel in our careers.

I would also like to thank a very important group of people for their contributions in putting together this conference. Our Conference Committee, led by Shelby Williams, along with our HQ staff, and the local Kansas City Chapter have spent hours organizing and coordinating this event. My sincerest thanks go out to all of you, as well as the numerous volunteers helping over the next few days.

In addition to opportunities for education and networking, we are celebrating our anniversary! Put on your Denim and Pearls and kick up (or kick off) your heels Monday night at the "80th Anniversary Denim & Pearls Gala." Profits from the Gala go to support the mission of The Foundation of AFWA. Don't forget to bid on the Silent Auction and buy a raffle ticket for the beautiful pearl jewelry. Lastly, the Kansas City chapter is making sure we experience Midwest hospitality by introducing us to KC BBQ on Saturday night and a Winery tasting and tour on Tuesday evening! Get out and enjoy the city and networking with fellow AFWA members.

Make new connections,  
renew old friendships,  
celebrate successes,  
and enjoy the conference!

*Karyn Hartke*

Karyn Hartke, CPA  
'18-'19 AFWA National President



## Your Benefits as an AFWA Member



### RELATIONSHIPS WORTH COUNTING ON

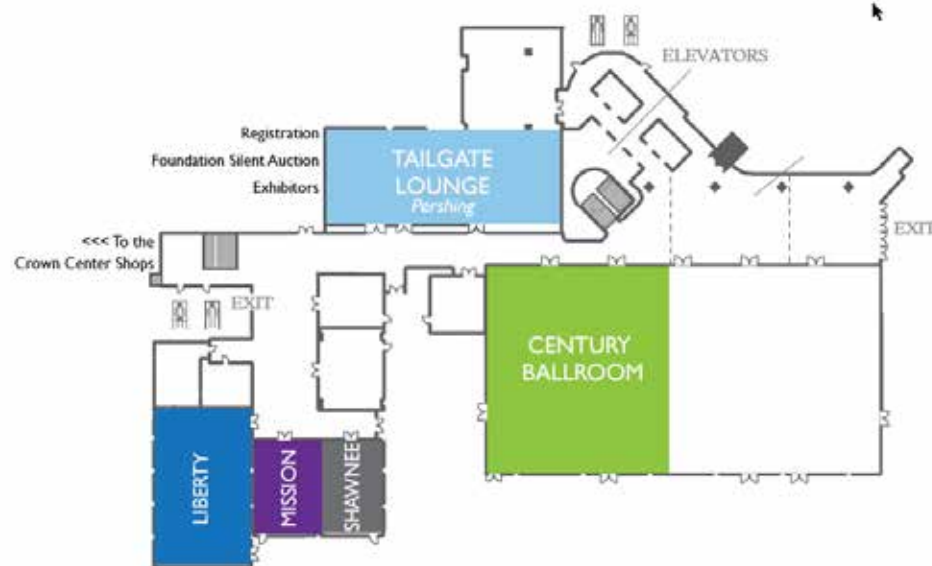
- A supportive network of women who inspire and promote each other
- 50+ local chapters across the country connect you to a nationwide network of professional resources and relocation opportunities
- Community on all major social networks including, Facebook, Twitter, Instagram, and LinkedIn
- Leadership development through local and national volunteer opportunities

### INVESTMENT IN YOUR POTENTIAL

- Low cost, high quality CPE offered through local, area and national conferences, events, and webinars
- A business listing in AFWA's National Find a Pro Directory
- eLearning offers free education on career and skills development
- Scholarships for AFWA members pursuing advanced certifications
- A variety of discount programs through corporate partnerships and alliances
- Access to an online Members Portal with resources for leadership and career development

**AFWA.org/JOIN**

## Welcome to the Westin - Kansas City, MO -



## Get Social

@AFWANational // #WomenWhoCount

### CONFERENCE MOBILE APP // Available for smartphone, tablet, or desktop!

Enhance your Conference experience with the mobile app. Leave your Conference Program in the room, all the information you'll need can be found on the app, including: Session and speaker details, Sponsor and exhibitor listings, and a list of all attendees.

Share your event experience with others by checking into sessions, posting status updates, sharing photos, and rating programs. \*\*\*Please Note: Any photos shared on the mobile app may be used by AFWA for future promotional purposes.

Not on mobile?

You can still participate using the desktop application at <https://crowd.cc/afwa18>

### GETTING STARTED



Check your email for an invitation to access the app. Open this email to follow the instructions for downloading and logging into the app.



Visit <https://crowd.cc/s/20aPq> on any device (iPhone, Android, Desktop Computer, tablet) to download the appropriate app. Or, if searching within your app store, use the key word "AttendeeHub." Once in the AttendeeHub, search for "Women Who Count"



Login using the email address you used for registration and the password **afwa18**



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Say hello and learn more at the **Xero booth**.

# General Information

## REGISTRATION DESK

For any questions regarding your conference registration, conference schedule, or AFWA membership, please stop by the Conference Registration Desk located in the Tailgate Lounge (Pershing).

### REG DESK HOURS

Saturday: 1:00p-5:00p  
 Sunday: 8:00a - 7:00p  
 Monday: 6:30a - 6:00p  
 Tuesday: 6:30a - 4:15p

Information about Kansas City sites and dining may be located at the concierge desk in the main hotel lobby.

## CONFERENCE BADGE

The official conference badge and badge holder must be worn for admission to sessions, exhibits, and other conference activities. There will be a \$25 fee to replace any lost conference badge. We thank you in advance for your cooperation.

## FREE WIFI FOR AFWA ATTENDEES

WiFi is exclusively available in all meeting spaces for AFWA conference attendees. To logon, use the following networks and passwords:

Network: WESTIN\_MEETING Password: WWC2018

If staying at the Westin **within the AFWA room block**, your WiFi is also comped. Login using the guest room WiFi and your daily rate will be comped at check out.

## CHARGING STATION

No need to go back to your room, or sit on the floor; stop by the mobile device charging station located near the registration desk in the tailgate lounge.

## SESSION HANDOUTS

As available, session handouts may be accessed for download and printing from the Conference Mobile app or at **AFWA.org/2018-national-conference-handouts**

## PROGRAM EVALUATIONS

Following each session, please take a moment to complete a session evaluation. These evaluations may be completed via a paper form provided by your session moderator, or online by using the Conference Mobile app.

## POST-CONFERENCE SURVEY

Following the conference, all attendees will receive a link to complete the post-conference survey. Your feedback in this survey is incredibly valuable to us for planning future events and conferences. Please be on the lookout for this survey in your inbox.

## Tailgate Lounge

Get to know Team AFWA in our Tailgate Lounge!  
 located in Pershing

- Registration
- Silent Auction
- Conference Partners
- AFWA Merchandise & Materials





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**PROFESSIONAL DEVELOPMENT ...  
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AFWA has partnered with *The Business Source* to bring you leading edge business book summaries to fuel your professional development.

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Watch your email inbox starting  
October 30th for details.



The 2019 Accounting MOVE Project will delve into the perceptions and misperceptions that women and firms have about how and why women pursue partnership and other senior leadership positions.

The report will also outline tactics that women, advocates for women, and firm leaders can take to ensure that all women CPAs can fully achieve their aspirations for their careers and drive firm growth in the process.

Firms of all sizes are invited to participate. *This is your opportunity to be named to the 2019 Best CPA Firms for Women list.*

More information at  
[wilson-taylorassoc.com](http://wilson-taylorassoc.com)



## CPE CREDIT

This year's conference will offer each attendee up to 17 CPE credit hours - plus an additional 4 CPE for pre-conference and AFWA Day attendees.

Each attendee is responsible for completing the CPE Certificate of Completion for individual sessions attended. This certificate is found in your welcome packet received at registration. Please return your Certificate of Completion to the Conference Registration Desk before leaving the conference. A signed certificate will be returned to you within 4-6 weeks following the National Conference.

AFWA is registered with the National Association of State Board of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of accountancy have final authority on the acceptance of individual courses of CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been based on a 50-minute hour.

## NASBA PROGRAM LEVELS & PREREQUISITES

- Basic (BAS) – Program knowledge level most beneficial to CPAs new to a skill or an attribute. These individuals are often at the staff or entry level in organizations, although such programs may also benefit a seasoned professional with limited exposure to the area.
- Intermediate (INT) – Program knowledge level that builds on a basic program, most appropriate for CPAs with detailed knowledge in an area. Such persons are often at a mid-level within the organization, with operational and/or supervisory responsibilities.
- Advanced (ADV) – Program knowledge level most useful for individuals with mastery of the particular topic. This level focuses on the development of in-depth knowledge, a variety of skills, or a broader range of applications. Advanced level programs are often appropriate for seasoned professionals within organizations; however, they may also be beneficial for other professionals with specialized knowledge in a subject.
- Overview (OVR) – Program knowledge level that provides a general review of a subject area from a broad perspective. These programs may be appropriate for professionals at all organizational levels.
- Update (UP) – Program knowledge level that provides a general review of new developments. This level is for participants with a background in the subject area who desire to keep current.



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## WILEY

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## Foundation of AFWA Events

The Women Who Count National Conference not only provides valuable education and networking opportunities – it also offers a chance to take part in fun events that benefit The Foundation of Accounting & Financial Women's Alliance. Socialize with colleagues and do a little shopping to raise funds to support the mission of The Foundation.

AFWA's National Conference, along with spring meetings, provide the greatest amount of financial support for The Foundation. Your participation in these events will help support scholarship and educational advancement for the upcoming year.

### AFWA 80th Anniversary Denim & Pearls Gala



Join us this year as we celebrate 80 years of Accounting & Financial Women's Alliance. The Foundation of AFWA has planned a memorable evening of food and entertainment at Kansas City's historic Union Station. Dress up your best pair of jeans with your favorite set of pearls and be ready to celebrate! *Ticket purchase required.*

### Foundation Silent Auction



Support The Foundation through a silent auction featuring items from chapters, firms, and individuals from across the country. Items include themed-baskets, electronics, hand-crafted items, and more. Bid on the silent auction - or **BUY NOW** - during meeting hours in the meeting space foyer, Sunday and Monday. Bidding will close during Monday's Dessert Break after the Foundation Fundraising Luncheon.

### 80/80 Pearl Celebration

Yet another way to celebrate AFWA's 80th Anniversary and support the Foundation of AFWA. Reserve your chance to win a beautiful pearl jewelry set! All payments must be collected at The Foundation table in the Tailgate Lounge by noon on Monday. The winner will be announced at the Denim & Pearls Gala. Only 80 spots – reserve yours today!

*The Foundation was created in 2004 to promote and advance education, career development and leadership in finance and accounting. The Foundation is a philanthropic 501(c)(3) organization. A portion of all donations may be tax deductible. For more information, visit our website at [www.FoundationOfAFWA.org](http://www.FoundationOfAFWA.org) or send email to [foundation@afwa.org](mailto:foundation@afwa.org).*

*Fact:*

In FY18 The Foundation of AFWA distributed \$23,000 in cash scholarships to students and aspiring professionals of accounting and finance!

# Schedule at a Glance

Sunday October 28 AFWA Day & Pre-Conference

8:00a	Breakfast and Annual Business Meeting Sign-In	
9:00a	AFWA Annual Business Meeting	
11:15a	AFWA Bylaws Forum	
	LIBERTY	MISSION
12:30p	Women Who Lead Anna Raney // Polston Tax	Long-Term Care Planning Andrea Wilt // Premier Financial Partners
1:40p	CENTURY C AFWA Chapter Achievement Panel	Surviving a Sales & Use Tax Audit Rick Sheahan // TaxesPlus, Inc
2:50p	AFWA Chapter Leader Roundtables	Guide Your Clients to Prepare Today for Tomorrow Jean OBrien & Frances Zeman // J.A. OBrien Associates
4:00p	Managing Commitments as a Leader Lori Davis // Grant Thornton, LLP	
5:15p	First Time Attendee Orientation	
5:45P	Opening Reception	

Monday October 29







7:00a	<b>Year of the Dog: Loyal or Vicious?</b> Dr. Chris Kuehl // Armada Corporate Intelligence		
9:00a	<b>OPENING KEYNOTE: Using Data for Good</b> Jacque Wiggins // Baker Tilley		
	SHAWNEE	MISSION	LIBERTY
10:10a	<b>Time to get serious about Enterprise Risk Management!</b> Jeanne Yamamura // Wiley Efficient Learning	<b>New Complexities in the Tax Reform and Jobs Act</b> Jeremy Morris // Williams-Keepers, LLC	<b>Ownership Transition and Business Valuation</b> Vanessa Brown Claiborne & Nene Glenn Gianfala // Chaffe & Associates
12:00p	<b>FOUNDATION FUNDRAISING LUNCH AND KEYNOTE</b> <b>Transformation Moves One Direction: From the Inside-Out!</b> Dr. Kevin Prine // Outreach International		
	SHAWNEE	MISSION	LIBERTY
2:20p	<b>Why our behavior makes us easy targets for hackers</b> Lanny Morrow // BKD, LLP	<b>Sales Tax: What you need to Know Today!</b> Monika Miles // Miles Consulting Group	<b>Overview of the New Leasing Standard</b> Matt Winger & Andy Gigstad // EY

Monday October 29





	SHAWNEE	MISSION	LIBERTY
3:30p	<b>Know How To Measure Your Investment</b> Matt Hertig // Alight Analytics	<b>Tax Court Cases You Have to Know About</b> Rachel Pappy // Polston Tax	<b>Assertiveness &amp; Constructive Confrontation</b> Dorothy Tannahill-Moran // Introvert Whisperer
4:40p	<b>KEYNOTE: Change Makers: Teaming Up to promote equity and opportunity in the workplace</b> Wendy Doyle // Women's Foundation		
6:00p	<b>AFWA 80th Anniversary Denim &amp; Pearls Gala</b> hosted by The Foundation of AFWA <i>Separate registration required</i>		


Tuesday October 30

7:00a	<b>0 to 60: What Every Trusted Advisor Should Know About the Fundamentals of Private Company Valuation</b> David Beach // Williams-Keepers, LLC		
9:00a	<b>KEYNOTE: Navigating the Seasons of a Career</b> Trina Le Riche // Ogletree, Deakins		
	SHAWNEE	MISSION	LIBERTY
11:00a	<b>Big Data Analytics: An Educational Perspective</b> Phil Watlington // University Saint Mary	<b>Data Compromises: Not If, When</b> Leah Patrick // IRS	<b>Foundations of a Strong Internal Audit Department</b> Lynn Fountain // Lynn Fountain
12:15p	<b>WOMEN WHO COUNT AWARDS LUNCHEON</b>		
	SHAWNEE	MISSION	LIBERTY
1:45p	<b>Success by Intent: Designing Your Best Year</b> Denise Mills // The LeaderFuel Center	<b>Top Reasons the IRS Will Audit You</b> Mike Engle // BKD, LLP	<b>Fraud &amp; Embezzlement</b> Angela Morelock // BKD, LLP
3:00p	<b>The Anatomy of a Disaster Declaration</b> Chadwick Taylor // YRC Freight	<b>Special Needs Trusts 101</b> Mark Munson // Shepherd Elder Law Group, LLC	<b>The Unexpected: Plot the Course for Change</b> Nancy Giere // Xero
4:10p	<b>KEYNOTE: Leading From All Directions: Young Professionals and Seasoned Professionals Working Together</b> Steven Harris // Rubin Brown, LLP, National Association of Black Accountants		
6:00p	<b>Wine Tasting &amp; Social with the Kansas City Chapter</b> <i>Separate registration required</i>		

8:00-9:00	BREAKFAST & ANNUAL BUSINESS MEETING SIGN-IN	
CENTURY		Arrive early to the AFWA 2018 Annual Business Meeting to sign in and enjoy a continental breakfast. The Annual Business Meeting will begin promptly at 9:00am. We appreciate your early sign-in!
9:00-11:00	AFWA ANNUAL BUSINESS MEETING (AFWA Members Only)	
CENTURY		All active members of AFWA are invited to attend the 2018 AFWA Annual Business Meeting. The meeting will include member and chapter recognitions, a report out by the AFWA National and Foundation of AFWA Boards, and nominations and voting for the 2019 Nominating Committee.
11:00	<b>Box Lunch Pick Up</b> (AFWA Day and Pre-Con Attendees)	
11:15-12:15	AFWA BYLAWS FORUM (AFWA Members Only)	
CENTURY		Join the AFWA National Board for a discussion of proposed National Bylaw amendments. Voting will not occur at this meeting, but at a later date via electronic vote. Each members' participation in this discussion is greatly valued.
12:30-1:30	BREAKOUT SESSIONS	
LIBERTY	 ANNA RANEY Polston Tax	<b>Women Who Lead</b> ++ <i>Personal Development</i> IBAS This presentation intentionally discusses ways to stay passionate in life and the need for good, honest mentorship as a woman in business. Attendees will realize the power of a good support system and walk away with tools to be more consistent in reaching their goals.
MISSION	 ANDREA WILT Premier Financial Partners	<b>Long-Term Care Planning: How to Avoid Financial Loss Associated with Long Term Care Needs</b> ++ <i>Specialized Knowledge</i> IINT 70% of those age 65+ will need some type of long-term care in their lifetimes. As a trusted advisor, it's imperative for you to understand the financial risks one faces when faced with a long-term care need. Learn how your clients can protect themselves through long-term care planning.
1:40-2:40	BREAKOUT SESSIONS	
CENTURY		<b>Chapter Achievement Panel Discussion</b> ++ <i>Personal Development</i> IBAS Leaders from Achievement Award winning Chapters will join a panel to answer your questions. Be inspired by their stories and ask how they made it happen!
MISSION	 RICK SHEAHAN TaxesPlus, Inc.	<b>Surviving a Sales &amp; Use Tax Audit</b> ++ <i>Taxes</i> IBAS Surviving a Sales & Use Tax Audit depends on YOU having the correct paperwork while Collecting and Remitting the tax due in the States where you have NEXUS. If you're not sure what NEXUS means, be sure to attend this session.

2:50-3:50	BREAKOUT SESSIONS	
CENTURY		<b>Chapter Roundtables</b> ++ <i>Personal Development</i> IBAS Be prepared with your questions and your own Chapter experiences to exchange ideas and learn from others in these speed-networking style roundtables on various topics including: We are losing members, what do we do now? - Help! We need more leaders? - Check your membership vital signs - I've got the best idea ever! Turn your chapter around with great programming - Show me the money! - You have a great story, tell it like a pro - Weather turbulence and come out strong: analyzing our competition.
MISSION	 JEAN OBRIEN, ASA & FRANCES ZEMAN, FASA J.A. OBrien Assoc.	<b>What's It Worth? How to Guide Your Clients to Prepare Today for Tomorrow</b> ++ <i>Specialized Knowledge</i> IOVR An appraisal is a document as important as a will. Your clients will depend on the information provided and choosing a qualified, independent and experienced appraiser is key to an outcome that correctly answers the valuation question as it applies to a specific use. Learn how to achieve this goal.
4:00-5:00	BREAKOUT SESSIONS	
LIBERTY	 LORI DAVIS, CPA Grant Thornton	<b>Managing Commitments as a Leader</b> ++ <i>Personal Development</i> IBAS If you feel over-committed, out of balance, and maybe even unhealthy, this presentation is for you. Learn when to say "yes" and when to say "no," how to delegate effectively, and maintain a clear sense of your priorities. This presentation is about living according to your priorities, not "balancing" them.
5:15-5:45	First Time Attendee Orientation	
SHAWNEE	Whether you're new to the AFWA National Conference, or it's been a break since your last attendance, join us for an informal meet and greet. Meet AFWA volunteers and staff, and learn how to make the most of your time in Kansas City.	
5:45-7:00	Opening Reception	
LOUNGE	All Conference attendees are invited to enjoy hor d'ouvres and a cash bar as you mingle with other attendees, browse the Foundation Silent Auction, and get to know our partners and exhibitors.	

7:00-9:00	LOUNGE	Good Morning! Coffee and lite breakfast
7:00-8:50	EARLY BIRD	
LIBERTY		<b>Year of the Dog: Loyal or Vicious?</b> ++ <i>Economics 2INT</i> It has been a tumultuous year – tax cuts, tariffs, trade wars, market instability and that was just the first three months. Since then we have had election year to contend with as well as the arrival of higher interest rates, inflation and reactions to the events of the first third of the year. What next?
	DR. CHRIS KUEHL Armada Corporate Intelligence	
9:00-10:00	OPENING KEYNOTE	
CENTURY		<b>Using Data for Good</b> ++ <i>Personnel/HR 1BAS</i> Baker Tilly's Jacqueline Wiggins will discuss how the Firm uses a broad set of data to shape its diversity, inclusion and belonging strategy beyond the business case in order to effect change.
	JACQUELINE WIGGINS Baker Tilley	
10:10-12:00	BREAKOUT SESSIONS	
SHAWNEE		<b>It's time to get serious about Enterprise Risk Management!</b> ++ <i>Management Services 2BAS</i> Every entity faces risks in its efforts to accomplish its mission and strategy. The new ERM seeks to develop a broader understanding of how to identify, assess, and mitigate risks throughout an organization. This course provides an overview of the changes and an introduction to a simple risk assessment process.
	JEANNE H. YAMAMURA, CPA, CGMA, MIM, PH.D. Wiley Efficient Learning	
MISSION		<b>Postcards Are for Vacations (Not Tax Returns): Planning for New Complexities in the Tax Reform and Jobs Act</b> ++ <i>Taxes 2INT</i> This session will offer attendees an inside look at changes in the Tax Reform and Jobs Act and how those changes affect businesses, individuals, estates, and trusts. The session will address planning opportunities as well as entity choice considerations. Attendees to this session will engage in expanded discussions, analysis, and observations about the provisions in the new tax law and its effect on taxpayers.
	JEREMY MORRIS, CPA Williams- Keepers, LLC	

LIBERTY		<b>Ownership Transition and Business Valuation: A Window of Opportunity to Make a Difference to your Client</b> ++ <i>Specialized Knowledge 2OVR</i> This session will provide an overview of the exit planning process and business valuation. Attendees will learn the basics of business valuation and how to help their clients maximize the value of their business prior to a transition. After leaving this session, attendees will have an understanding of how to implement exit planning into their practice, better assist their client in adding value to their company prior to their exit, and ensure their client's needs are met for the next phase in their life.
	VANESSA BROWN CLAIBORNE CPA/ABV, ASA, AEP®, CEPA NENE GLENN GIANFALA, CPA/ABV, CEIV, ASA- BV/IA Chaffe & Associates, Inc.	
12:00-1:50	FOUNDATION FUNDRAISING LUNCH AND KEYNOTE	
CENTURY		<b>Transformation Moves One Direction: from the Inside-Out!</b> ++ <i>Personal Development 1BAS</i> People all over the world have common aspirations and dreams, but most seem perpetually unfulfilled. Are there data-driven methods that improve our odds that we will succeed? Come celebrate examples of women winning despite extreme obstacles and learn how these same techniques can work for you.
	KEVIN PRINE, PhD Outreach International	
1:50-2:15	COFFEE BREAK AND DESSERT	
LOUNGE		Enjoy a special dessert break with our partners and sponsors in the Tailgate Lounge to celebrate AFWA's 80th Anniversary. And don't forget to place your final bids on The Foundation Silent Auction!



**AFWA Members** have access to exclusive scholarships from the Foundation of AFWA to further their careers.





**Review Course Scholarships** available for:

- Wiley CPAexcel Platinum Review Course, CMAexcel Review, CIA Review, CFP Review, and PMP Review Courses
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And **Certification Scholarships** to cover the cost of Exam fees for those who have recently passed.

Visit  
[AFWA.org/scholarships](https://AFWA.org/scholarships)  
to apply!

2:20-3:20 BREAKOUT SESSIONS	
SHAWNEE	 <p><b>Hackers Love You! Why our behavior makes us easy targets for hackers, and how to prevent it</b>            ++ Information Technology IINT            Explore the profile of a typical hacker, and types of data at risk. Real-life "from the trenches" case studies of common cyber breaches. Best practices for responding to a cyber incident as well as preparedness, monitoring and response strategies at the organizational level as well as personal cybersecurity habits. Importance of a cultural response to cyber risk, and how to achieve a proper "tone at the top".</p> <p>LANNY MORROW, ENCE, CTFI BKD, LLP</p>
MISSION	 <p><b>Sales Tax: What you need to Know Today!</b>            ++ Tax IINT            The sales tax world is changing on almost a daily basis. Companies selling across state lines need to be aware of nexus (aka taxable presence), taxability of their products, exemptions, and filing responsibilities as a result of ever changing state (and possibly federal) legislation. Get caught up here!</p> <p>MONIKA MILES, CPA Miles Consulting Group, Inc.</p> <p>With a special presentation by Avalara  Tax compliance done right</p>
LIBERTY	 <p><b>Overview of the New Leasing Standard</b>            ++ Accounting IINT            The session will provide an overview of the new leasing standard. The discussion will cover disclosure requirements intended to enable users of financial statements to understand the amount, timing, and judgments related to a reporting entity's accounting for leases and the related cash flows.</p> <p>MATT WINGER &amp; ANDY GIGSTAD EY</p>
3:30-4:30 BREAKOUT SESSIONS	
SHAWNEE	 <p><b>First Rule of Marketing: Know How To Measure Your Investment</b>            ++ Marketing IBAS             For any organization, marketing is a critical strategy that should support and drive business growth. In this session, learn the following strategies: Understanding a customer's decision journey, how to build a marketing analytics funnel, build a clear data-driven marketing strategy, a 30-day plan to drive growth through marketing.</p> <p>MATT HERTIG Alight Analytics</p>

MISSION	 <p><b>Tax Court Cases You Have to Know About</b>            ++ Taxes IINT            In a highly engaging presentation, Rachel discusses 3 different cases that went to tax court. Her presentation sheds light on details of the case along with what the court said about each case. It is an insightful look into not only tax court, but the government accountability office as well. Cases discussed include: United States v. Michael Balice   United States v. Robert Welemin   Summa Holdings Inc. v. Commissioner   Government Accountability Office</p> <p>RACHEL PAPPY Polston Tax</p>
LIBERTY	 <p><b>Talk Like a Leader: How to Master Assertiveness and Constructive Confrontation</b>            ++ Personal Development IBAS            If you're a professional you are a leader, which means you have to do things to step out of your comfort zone. Assertiveness &amp; Constructive Communication is required to achieve business goals but not everyone does it effectively. You can learn how by identifying specific steps to master the process.</p> <p>DOROTHY TANNAHILL-MORAN Introvert Whisperer Coaching</p>
4:50-5:40 KEYNOTE	
CENTURY	 <p><b>Change Makers: Teaming Up to promote equity and opportunity in the workplace</b>            ++ Personnel/Human Resources IBAS            Wendy Doyle, Women's Foundation President &amp; CEO, will talk about the practical ways women can team up to make their voices heard and drive positive change in the workplace.</p> <p>WENDY DOYLE Women's Foundation</p>
6:00-10:00 AFWA 80th ANNIVERSARY DENIM & PEARLS GALA	
	 <p>Join us this year as we celebrate 80 years of Women Who Count. The Foundation of AFWA has planned a memorable evening of food and entertainment at Kansas City's historic Union Station. Dress up your best pair of jeans with your favorite set of pearls and be ready to celebrate! <i>Ticket purchase required.</i></p>

## Get Involved

The AFWA National and Foundation Boards have openings for Directors and Committee Members beginning in July 2019. Find out how you can make an impact in AFWA through volunteer positions.




>> On Site Interviews Available

Stop by the AFWA Information table for more info on:

- National and Foundation Boards
- LEAP Advisory Council
- National and Foundation Committees
- 2019 Conference Committee
- Membership Benefits
- Lifetime Membership



What's your favorite take away from the day?  
 #WomenWhoCount





7:00-9:00	LOUNGE	<b>Continental Breakfast</b>
7:00-8:50	EARLY BIRD	
LIBERTY		<b>0 to 60: What Every Trusted Advisor Should Know About the Fundamentals of Private Company Valuation</b> ++ <i>Specialized Knowledge 2OVR</i> This session will provide attendees with an overview of private company valuation practices and procedures. Participants will learn how to interpret the different services provided by valuation advisors and will study different models considered when analyzing the value of small to midsize private companies.
	DAVID C. BEACH, CPA, CVA Williams-Keepers, LLC	
9:00-10:50	<b>OPENING PLENARY: Two sessions in one!</b>	
CENTURY		<b>Navigating the Seasons of a Career with a Panel Discussion</b> ++ <i>Personal Development 2BAS</i> As women in the accounting and finance industries, we face a unique set of challenges. Trina, along with a panel of professional women from various stages of career, will address those obstacles and how to overcome them. They'll also discuss the goals you'll set, the wins you'll celebrate, and they network you'll build along your path to success.
	TRINA LE RICHE Ogletree, Deakins, Nash, Smoak & Stewart, P.C.	
10:50-11:00	LOUNGE	<b>Coffee Break:</b> Your last opportunity to stop by and thank our Conference partners!
11:00-12:00	<b>BREAKOUT SESSIONS</b>	
SHAWNEE		<b>The Elephant in the Room: Big Data Analytics – An Educational Perspective</b> ++ <i>Management Services 1BAS</i> To support effective managerial decision-making, finance and accounting professionals are being called upon to provide analyses, interpret data and recommend alternatives and/or specific actions. What do today's accounting and financial professionals need to understand about data analytics, and how are educational institutions preparing students for their new roles in decision making.
	PHIL WATLINGTON, MBA University Saint Mary	

## Wine Tasting Social

Join the Kansas City Chapter, Tuesday evening for a tour and tasting of Amigoni Urban Winery. Event proceeds support the local Kansas City Scholarship Fund.

RSVP: [evite.me/81A6m749uX](https://evite.me/81A6m749uX)

MISSION		<b>Data Compromises: Not a Matter of If, but When</b> ++ <i>Information Technology 1ADV</i> This presentation was developed to heighten awareness and the importance of having an Information Security Plan (NIST Framework). Criminal Investigation (CI) will focus on the various types of data compromises impacting the tax professional industry. As part of the presentation, CI will stress the significance of informing the IRS and related State Taxing Authorities upon discovery of the data loss.
	LEAH PATRICK Internal Revenue Service	
LIBERTY		<b>Foundations of a Strong Internal Audit Department</b> ++ <i>Auditing 1INT</i> Individuals considering an internal audit management role should understand the challenges as well as benefits that may be presented to them within this role. This session is designed to step into the reality of the internal audit management role and discuss concepts that aren't always openly discussed within organizations--but are important concepts the internal audit manager should ensure they can clarify with management.
	LYNN FOUNTAIN, CPA, CGMA, CRMA, MBA	
12:15-1:30	<b>AFWA Women Who Count Awards Luncheon</b>	
CENTURY		AFWA's members are a reflection of our values - empowerment, leadership, integrity, and passion. Each year we proudly recognize outstanding women who exemplify these values in career and life, setting a positive example for other women in the industry.
		Sponsored by  THE O PROTOCOL
1:45-2:45	<b>BREAKOUT SESSIONS</b>	
SHAWNEE		<b>Success by Intent: Designing Your Best Year</b> ++ <i>Personal Development 1BAS</i> Success by Intent: Designing Your Best Year will challenge each woman to be purposeful in how they lead. We'll discuss the gender differences in how you lead. How you think and what you think makes a difference in how you lead -- Mindset matters. You'll learn strategies to build your confidence as a leader.
	DENISE MILLS The Leader Fuel Center	
MISSION		<b>Top Reasons the IRS Will Audit You</b> ++ <i>Taxes 1INT</i> Over the years, the IRS has been using data analytics to gauge Form 990 risks, and the agency is starting to audit tax-exempt entities based on those findings. The presentation looks at the risk associated with an organization's Form 990 and how to be proactive instead of reactive.
	MIKE ENGLE BKD, LLP	

LIBERTY		<b>Fraud &amp; Embezzlement: Lessons From the Trenches</b> <b>++ Auditing IINT</b> Fraud can wreak havoc on organization financial performance and undermine business objectives. No business is immune from the risks associated with fraud, and education is the key to prevention. Angela Morelock, a partner with BKD, LLP will share her insights into the world of internal embezzlement based on her experience investigating white-collar crime. With stories from the trenches and often overlooked
	ANGELA MORELOCK, CPA, CFE, CFF, ABV BKD, LLP	
3:00-4:00 BREAK OUT SESSIONS		
SHAWNEE		<b>RTOs, RPOs, MTDs, Oh My!! The Anatomy of a Disaster Declaration</b> <b>++ Information Technology IINT</b> This session will walk you through a typical disaster declaration timeline; and explain the acronyms and terminology along the way. We will dissect the timeline while educating you on the fundamental disaster recovery terms commonly used in a BIA. So, when IT starts talking in alphabet soup, (RTOs, RPOs and MTDs), you will know the concepts and how to respond in a highly intelligent manner; instead of just saying, "Oh my!"
	CHADWICK TAYLOR YRC Freight	
MISSION		<b>Special Needs Trusts 101: Everything You Need To Know To Help Disabled Individuals And Their Families</b> <b>++ Law IBAS</b> This session will offer the attendee the opportunity to learn about special needs trusts, the taxation of special needs trusts, best practices for the administration of special needs trusts, and what factors to consider when selecting a trustee for a special needs trust. After attending this session, the attendee will be able to identify how special needs trusts can be used to help disabled individuals and their families.
	ATTORNEY MARK D. MUNSON, CELA Shepherd Elder Law Group, LLC	
LIBERTY		<b>The Unexpected: Plot the Course for Change</b> <b>++ Personal Development IBAS</b> You may not have much control over the changes in your life. But you can certainly control your response. It starts with an attitude to view the change – be it bad or good – as a catalyst to create new opportunities, and even to launch an exciting, fun adventure. Join Xero's Nancy Giere to review strategies you can use to successfully assess and navigate the unexpected.
	NANCY GIERE Xero	

4:10-5:15 CLOSING KEYNOTE	
CENTURY	 <b>Leading From All Directions: Young Professionals and Seasoned Professionals Working Together</b> <b>++ Personal Development IBAS</b> Young Professionals are demanding changes in the workplace, but even the most flexible Seasoned Professionals will acknowledge that change can't happen over night. How can – and should – Young Professionals and Seasoned Professionals work together to agree on change that is best for the organization as whole. As a leader in his own firm, walking the line between young and seasoned professional, Steven will share what he sees on a daily basis, and provide insight into today's unique dynamic of young professionals and seasoned professionals working closely together.
	STEVEN HARRIS Rubin Brown, LLP & NABA
Safe travels home! But if you're staying...	
6:00-9:00	<b>Wine Tasting &amp; Social at Amigoni Urban Winery</b>  This event is hosted by the AFWA Kansas City Chapter. <i>Ticket purchase is required.</i> The winemakers at Amigoni Urban Winery will give us a private tour of their wine cellars where we will learn about the wine-making process as we taste our way through a flight of Amigoni wines.



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"I hope every year to see more and more women write the  
coveted letters, C.P.A. after their name."

*Ida Broo, CPA // Founder of AFWA*



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