

**ACCOUNTING & FINANCIAL  
WOMEN WHO COUNT  
VIRTUAL CONFERENCE  
OCT. 18-22, 2021**



## **2021 WWC Schedule of Events**

### **Monday, October 18, 2021**

10:00 am – 1:00 pm	AFWA National Board Meeting
1:00 pm – 2:30 pm	AFWA Foundation Board Meeting
2:30 pm – 3:30 pm	LEAP Meeting
3:30 pm – 5:10 pm	EDUCATION – 2 HOUR DEEP DIVE SESSION (TBD)

### **Tuesday, October 19, 2021**

12:00 pm – 1:20 pm	<b>Welcome, Kickoff and Opening Keynote featuring Nela Richardson</b> This session will cover the economic and labor market outlook, presented by Nela Richardson, Chief Economist and co-head of the ADP Research Institute. Nela will share insights on the economic recovery in 2021, workforce trends and women's experience during the pandemic.
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#### **Key Takeaways**

- **The state of the economic recovery**
  - ✓ How soon will the economy return to pre-pandemic levels?
- **Understand the state of the 2021 labor market:**
  - ✓ Workforce trends shaping the Economy Recovery
  - ✓ What are the latest jobs figures?
  - ✓ What industry sectors are seeing largest gains?
- **Women in the workforce and gender disparities in pay and promotion**
  - ✓ Review the impact of the pandemic across corporate hierarchies
  - ✓ Investigate the gender pay gap post the onslaught of COVID-19



Nela Richardson joined ADP as Chief Economist in November of 2020. Nela is the co-head of the ADP Research Institute and leads economic research for ADP. Previously she was Principal and Investment Strategist at Edward Jones, a financial services firm. In that role, Nela analyzed and interpreted economic trends and financial market conditions and recommended investment strategies. Nela is also the former chief economist at Redfin Corp., a national real estate brokerage and technology company, where she led a team of data scientists, economists and writers to track trends in the housing market. Nela also served as a senior economist for Bloomberg, L.P., covering housing and financial markets, and has held research positions at the Commodity Futures Trading Commission (CFTC), Harvard University's Joint Center for Housing Studies and Freddie Mac. She also worked as an adjunct finance professor at the Carey School of Business at John Hopkins University. Nela earned a doctorate in economics from the University of Maryland-College Park with concentrations in financial economics, international finance and economic development. She obtained a master's degree in economics from the University of Pennsylvania and a bachelor's degree from Indiana University in Bloomington, where she was a triple major in mathematics, economics and philosophy. Nela regularly provides insight on the economy, real estate trends and capital markets to policymakers, consumers and media. She is a regular contributor to Marketplace from American Public Media and has frequently appeared on CNBC, Bloomberg, Fox Business CNN, Yahoo Finance, the Wall Street Journal, FORTUNE magazine, The New York Times and other national and local media. Nela serves on the foundation board for the U.S. Chamber of Commerce and is a member of the Conference of Business Economists.

*Field of Study:*

*Skill Level: Overview*

1:30 – 2:20pm EST

CONCURRENT SESSIONS

## **1A. The Ugly Truth About IRS Audits**

***Whitney Craig, CPA, EA, Polston Tax Resolution & Accounting***

Join us as Whitney goes through multiple case studies as well as technical information about IRS audits, what you need to know when representing your client in an audit and practical information to be aware of. Whitney Craig is an Oklahoma native, born in Ada and raised in Bixby. At the suggestion of her father who always tried to steer her towards the accounting field, Whitney began taking classes at the University of Oklahoma. Much to her surprise, she enjoyed it! Not only did she enjoy accounting work, she found that she had an undiscovered passion for numbers and found that in doing so she could help others navigate through the complications of tax and accounting. After graduating from the University of Oklahoma with a Bachelor of Business Administration in Accounting, she went on to earn her MBA from the University of Central Oklahoma. Today, Whitney is a Certified Public Accountant and serves as the Director of Tax and Accounting at Polston Tax & Accounting. She has a passion for helping people and speaks on various technical tax topics throughout the year.



*Field of Study: Taxes*  
*Skill Level: Intermediate*

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## **1B. Best Practices for Successful Finance and Accounting Organizations within Tech Companies**

***Rose Punkunus, MBA, Sudozi, Inc***

Running a finance and accounting team at a high growth technology company can be uniquely challenging for a few reasons: speed of operations, new business models, new data sources, new tools, among others. Learn about best practices for transitioning to and overseeing a finance & accounting team in tech. The session will include topics such as: organizational structure, career development, hiring, investor relations, common technologies, and working closely with other departments.



Rose Punkunus is Founder & CEO of Sudozi, the tool modernizing vendor management and spend requests. Prior to founding Sudozi, Rose was CFO of ScaleFactor, an Austin based fintech helping to automate accounting activities. ScaleFactor's investors including Coatue, Bessemer Venture Partners, Canaan, and others. Prior to ScaleFactor, Rose was VP Finance at Fundbox, a San Francisco and Tel Aviv headquartered fintech using data science to make lending decisions for SMBs. Fundbox's investors including General Catalyst Partners, Khosla Ventures, Spark Capital, Allianz, and others. At both ScaleFactor and Fundbox, Rose oversaw all of accounting and finance and reported directly to the CEO. Prior to Fundbox, Rose joined Uber in 2013 and was one of the first 10 hires on finance & accounting, helping the team to grow to several hundred before she transitioned in 2017. Rose has managed many teams including: Accountant, FP&A, BizOps, Strategic Finance, Recruiting, Data Science, and Product.

*Field of Study: Business Management & Organization  
Skill Level: Intermediate/Advanced*

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## **1C. Moving from Idea to Execution: Strategic Planning Done Right!**

***Andrena Sawyer, CNP, P.E.R.K. Consulting***

Whether you are at the idea or the operational stage of your project or business, you need a plan! Not just any plan, but a strategic plan, which is essential for project and business growth. In this session, attendees will learn how to create SMART Goals and action steps to accomplish those goals. Attendees will discover their internal assets, service refinement process, and learn how to understand and implement best practices after engaging in a SWOT analysis and learning how to write out the critical (financial, operational and capacity) elements of a practical strategic plan.



Andrena Sawyer is the Founder and President of P.E.R.K. Consulting, an advisory firm for small to mid-sized nonprofits and businesses. Originally from Freetown, Sierra Leone, she and her family moved to the United States when she was nine years old due to a civil war that left thousands dead and untold numbers maimed and displaced. She now credits her family's move during the war for her interest in human triumph and innovation. For her work with entrepreneurs and small businesses, she has received numerous awards, including StartUpAfrica's 2019 Entrepreneur of the Year, The Black Business Review's 40 Under 40 and The International Alliance for Women World of Difference 100 Award. In addition to her work with P.E.R.K. Consulting, she is the author of The Mis-Adventures of a New

Entrepreneur and The Long Way Home.

*Field of Study: Business Management & Organization  
Skill Level: Intermediate*

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## **2A. Featured Film: Tackling Taxes**

### ***Rachel Mathew, Attorney, Polston Tax Resolution & Accounting***

Taxes in the movies, Rachel Mathew goes through movies that have IRS agents, accountants and tax problems and goes through the tax tips for each scenario. As well as discussing the tax consequences of each film and episode. The attendee will gain knowledge from Rachel's experience as an accountant, tax attorney and business owner.



Rachel loves making the topic of tax policy, tax strategy, tax administration, tax cases, and tax law easy to understand for all! Her unusually high aptitude for math became evident while working on her undergraduate degree. Though not required for her degree, Rachel found that she excelled in high level college math courses and took algebra, trigonometry, pre-calculus, calculus I, calculus II, calculus III, differential equations, and statistics. Her affinity for math and willingness to always help other students, prompted one of her college professors to ask her if she could hire Rachel as a teaching instructor and if she would be interested in a job as a tutor for the math department. Rachel said yes to both! Finding ways to explain concepts to students who had enormous difficulty grasping the subjects reinforced how much Rachel loved helping others. She embraced the pressure of students passing or failing their math classes, knowing that it often hinged on her ability to help them overcome a mental hurdle. Not much

has changed in the decades since. Rachel began in the tax and accounting field in 1999 and after working as an accountant, Rachel was inspired to become a tax attorney so she could use her knowledge of complex tax laws to help the public navigate the nightmare they faced at the IRS. Rachel and Rod Polston co-own Polston Tax with over 100 employees across the nation and together they have grown it into one of the largest tax resolution firms in the nation. Rachel Mathew has spoken to thousands of individuals all over the United States about taxes, accounting, the economy, politics, the IRS, growing a business, being self-employed, branding, marketing, work life balance, ethics in business, and more.

*Field of Study: Accounting/Taxes*

*Skill Level: Intermediate*

## **2B. Building Blocks for Your Financial Future**

### ***Suzanne Wheeler, CFP®, AIF®, CeFT®, Mariner Wealth Advisors***

When it comes to building wealth, women tend to be underrepresented and underserved. We believe one reason for this is that it's hard for them to find advice that is specific to their situation. Suzanne Wheeler will share crucial information for women to ramp up their investing knowledge and develop a plan for financial freedom, while Jennifer Kohlbacher will share tax strategies. This presentation will cover topics including wealth planning, risk management, retirement planning, Social Security, Medicare, investment management, tax planning, and estate planning. Join us to gain a better understanding and explore ways to help you become more financially confident.



Suzanne is a CERTIFIED FINANCIAL PLANNER™ professional, Accredited Investment Fiduciary® designee and a Certified Financial Transitionist®. Experience and Education For more than two decades, Suzanne has served as a trusted partner to clients as they navigate divorce, death, retirement, inheritance, legacy planning and the day-to-day challenges life can bring. Her passion lies in being an advocate for clients as they develop goals, and she creates plans that use a range of strategies to help clients meet those goals. Suzanne works with high-net-worth individuals, families and foundations. Previously, Suzanne was cofounder and director of Adams Hall Wealth Advisors. She holds a bachelor's degree in finance with an emphasis on financial planning from Northeastern State University.

*Field of Study: Finance*

*Skill Level: Basic/Overview*



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## **2C. Training That Sells: Creating the Ultimate Lead Magnet**

***Nancy M. Giere, Nancy Giere Associates, Inc.***

Would you like to offer your prospects high-quality, engaging content that sells your value without being salesy? In this interactive engaging program, Nancy will show you how to leverage a prospect education system to generate more leads, attract more prospects and ultimately secure more sales. This strategy will help you to increase your credibility, expand your influence and build trust and loyalty. In this session we'll look at: Different training business models so you can determine the best approach for your firm. -The key elements of a content plan to keep you organized and on track -How to create a comprehensive content plan to so you can consistently generate new content. -A content creation process that streamlines course creation. – How to leverage technology to create amazing courses



After a lifetime in the corporate training world, Nancy knows how businesses operate and she isn't afraid to shake things up. Her unique perspective combined with 25+ years of experience has empowered her with fresh insight and the industry's best-kept secrets that she's ready to share with you. On a lifelong campaign against boring training, she uses the power of storytelling and light-hearted humor to create an engaging, fun, and interactive environment. Masterfully intertwining comedic humor with life lessons, her stories make learning stick! Nancy has worked with the biggest names in corporate America like Johnson Controls, Harley Davidson, and Northwestern Mutual.

*Field of Study: Communications & Marketing*  
*Skill Level: Overview*

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**3:30 pm – 4:30 pm**

**Exhibit Hall Open**



### **3A. Curious about Cannabis? Accounting and Finance Basics**

***Katye Maxson-Landis, CPA, Moxy Accounting, LLC***

A multi-billion-dollar industry with a growing number of states legalizing adult recreational use, cannabis is here to stay. For those looking to find an accounting niche that is leading-edge, complex, and unique, cannabis accounting is a burgeoning field. There is a growing need across our country for measured, accurate tax work in this industry. When considering cannabis as a niche accounting field, there are four questions a practitioner should ask themselves. Do I know my client? Understanding industry operators and one's client is crucial in successful, effective partnerships. Consider ways to navigate a male dominated industry. Do I know their compliance environment? State regulations and laws impacting the cannabis industry are the bedrock upon which you build and defend your tax position. What is my tax position? A thoughtful tax position is crucial to preserving your professional integrity. Finally, do I want to do this? Considering how you will engage with clients through hard conversations, boundary setting and activating professional skepticism are valuable activities before jumping into cannabis. Join Katye in a conversation about this pioneering corner of the accounting world.



Katye received her Certified Public Accountant (CPA) credential in 2011, after working in the salt mines of public accounting for seven years as an auditor and staff accountant. Prior to that, Katye worked as a bookkeeper and business administrator for thirteen years. Katye's greatest strengths are her experience and perspective; she can relate not only to her clients' managerial challenges, but also to those of their staff on the front lines and back rooms of retail and bookkeeping. Katye's clients and colleagues appreciate her blend of humorous irreverence, professional inquisitiveness, and intellectual skepticism for just about everything. Both inside and outside of the office, Katye is a co-parent, spouse, educator, mentor, ally, advisor, and friend.

*Field of Study: Specialized Knowledge  
Skill Level: Basic*

### **3B. Social Security as a Piece in Your Retirement Puzzle**

***Wendi Hall, CPA, IAR, Small Office Solutions LLC***

The changes to the Social Security Retirement benefit rules have made previously advantaged choices obsolete. We will cover how benefits are earned, when they are available, options for spouses included ex-spouses, determining benefit amounts, comparing options, how to determine when benefits are taxable and by how much, and guidelines to consider when deciding when to claim social security retirement benefits.



Wendi Hall is the managing partner of Small Office Solutions LLC, established in 1998. Wendi and her team provide comprehensive financial services to individuals and small business including compliance, tax and retirement planning, and business growth and profitability consulting. Wendi is the author of several published articles covering topics such as tax planning, business development, and technology. She was named as a Milwaukee Magazine Top Wealth Manager for the last four years in a row and her company was listed as Best of Brookfield the last five years. She is a certified Mastery Profit First Professional. She has been a featured speaker on The Abundant Accountant podcast and Profit First Nation podcast. She currently serves as

secretary on The Foundation of AFWA.

*Field of Study: Specialized Knowledge  
Skill Level: Basic*

### **3C. The ROI of BEyond Leadership When You Lead a Change**

**Noa Ronen, Noa Ronen Coaching**

What is missing in your formula to be better as a leader? What is missing in your formula to communicate better with others? to create the change you want and engage and influence others it starts with creating awareness - learn the simple CHANGE FORMULA that can help you create the change you want. Understand what you are overdoing or over being or maybe less doing or less being.

DO X Be3 = Change



Noa Ronen is your out of the box coach. She is also an author, vlogger, disruptor, and coffee lover. She brings more than 20 years of experience in Change Management, Human Resources, Project Management, and coaching. She encourages progressive and social business leaders and their teams to challenge the norms so they can create the change they desire. Noa's personal relocation experience resulted in a refreshing view of the world that invites you rather than looking for others' differences to open your mind and heart to see people and situations differently. This is what Noa calls BEyond Leadership where your new way of being inspires and influences others. If you would like to go to BEyond: Leadership check her book: BEyond: Leadership from AwareLess to AwareNess.

*Field of Study: Personal Development*

*Skill Level: Intermediate*

5:30 pm – 6:20 pm

### **KEYNOTE**

#### **Winning Conversations that Engage Your Clients**

**Loren Fogelman, M.Ed., Business Success Solution**

You're at a networking event, initial consultation or client meeting. You find yourself face to face with someone who's interested in speaking with you. Since you're not a natural-born talker, you wonder how to start the conversation. Your mind, however, goes blank as you try to think of something smart to say.

Great communication is an art. Say the wrong thing and your client's eyes will glaze over. Whereas a meaningful conversation creates a positive lasting effect – even if it's someone you're meeting for the first time.

Turn your meetings, whether virtual or in-person, into memorable, engaging conversations. By doing so, your clients will walk away happy they connected with you.



Loren Fogelman is a keynote speaker and one of America's top ranked business coaches. From 2018 to 2020, she's been recognized by HubSpot in its annual list of the world's top 22 business coaches. She delivers talks and workshops at major conferences such as Inbound, one of the world's most esteemed content marketing events for entrepreneurs, as well as many accounting conferences. Loren is an expert in pricing strategy and sales for accounting professionals. She coaches them to shift away from the "dollars-per-hour" pricing trap to a value-based pricing model. This allows her clients to reduce workload by as much as 50% while doubling revenues.

She's a regular contributor to Intuit's Firm of the Future series, Accounting Web, CPA Academy and the author of two Amazon best seller books: The Winning Point: How to Master the Mindset

*Field of Study: Communications & Marketing*

*Skill Level: Intermediate*





## Wednesday, October 20, 2021

10:00 am – 11:40 am

Early Bird Workshop – Eliz Green

### Overcome Overwhelm

*Eliz Greene*

In our busy lives, we rarely stop to examine the swirl of demands for our time, energy, and attention. Overwhelm makes us feel like we can't keep up. If everything is urgently important, nothing can be a priority. What often is blamed on lack of organization or poor time management usually turns out to be overwhelm-induced confusion of urgency.



Surviving a heart attack at age 35 while seven months pregnant with twins propelled Eliz Greene on a mission to share her story to inspire other busy people to pay attention to their health. Recognizing stress as an essential and often under-addressed risk factor, Eliz conducted a research study on job stress. Her latest book, *Stress-Proof Your Life*, offers implementable strategies to combat uncertainty, overcome overwhelm, and improve performance and quality of life. She was named as a Top Online Influencer on Stress and Heart Health. She's been seen on CNN, PBS, Lifetime, TNT, and many national and local news programs. A national spokesperson and advocate for the American Heart Association, Eliz received the Heart Hero Award in 2010. Today, Eliz enjoys life with her wonderful husband, Clay, their beautiful (now adult) daughters.

*Field of Study: Personal Development*

*Skill Level: Intermediate*

11:30 am – 12:30 pm

Exhibit Hall Open – LIVE





#### **4A. How to Lower Your Effective Tax Rate PLUS Biden Tax Changes**

***Elizabeth Hazzard-Herzing and Sara Savu CPA, BKD, LLP***

This session will teach attendees about basic transfer pricing principles, U.S. and foreign transfer pricing documentation requirements, and how multi-national enterprises can use the international tax provisions and transfer pricing to lower their effective tax rates. Lowering a company's effective tax rate may involve moving profits into the U.S. or outside the U.S. through transfer pricing or other methods. International tax basics will be discussed and the differences in those principles that exist for partnerships, S-corporations, and C-corporations. In addition, if the Biden Administration has pushed through tax law changes affecting the international tax arena, we would present those changes.



Elizabeth is a dedicated transfer pricing consultant. She has experience preparing transfer pricing reports, including planning analyses, documentation studies, economic analyses and IRS audit responses. She has worked with clients in a variety of industries, including manufacturing, chemicals, service providers, foodstuffs and software. Elizabeth was temporarily transferred to Budapest, Hungary, where she gained extensive experience with transfer pricing methodologies specific to the Organization for Economic Co-operation and Development and European Union.



Sara is a member of BKD's International Tax Services division. She focuses on providing international tax compliance and consulting services in areas such as foreign tax credits, domestic international sales corporation taxation, foreign tax provision, subpart F, and income tax treaties for multinational companies.

*Field of Study: Taxes  
Skill Level: Basic*

#### **4B. Rise of Fraud Risk in the COVID-19 Era**

***Caridad Vasallo, CPA, CVA, CFE, CFC, CAMS, VMBG Accounting***

COVID-19 has disrupted the business environment in many ways. With employees working remotely and a greater reliance on technology, there are new operational challenges. These challenges could lead to an increase in fraud. Areas with greatest risk of increased fraud are cyber activity, identity theft, payment fraud, unemployment fraud, and healthcare fraud. How can your organization handle these challenges in order to make sure they do not impact your bottom line?



Caridad "Carey" Vasallo, VMBG Partner, has been active in the community through her work with women entrepreneurs and the accounting industry. Her efforts have garnered her the receipt of the AICPA Women to Watch Award, FICPA Horizon Award, FICPA 26 Under 36 Award, CPA Practice Advisor 40 Under 40 Award, and NACVA 40 Under 40 Award. Carey has several professional designations including, CPA, CVA, CFE, CFC, ABV and been featured in several publications. She has also presented to numerous organizations including AFWA in 2019.

*Field of Study: Accounting  
Skill Level: Basic*

#### **4C. Unleash Your Peak Performance**

***Sarah Elliott, PCC, CPA, Intend2Lead LLC***

Let's face it – this profession can feel demanding at times! Many of us focus all our energy on serving those around us – our clients, teams, colleagues, family, and friends – often at the expense of our well-being. Not only is this not sustainable, but it's also negatively impacting our ability to help those around us. In order to be a high performer, you must increase your capacity to bring energy and full engagement to the things you value most. Explore how well-being and mindfulness contribute to your performance and leadership capacity and create your own peak performance plan!



Sarah believes the future of the accounting profession depends on our capacity to love. She helps accountants access the Dimension of Possible through leadership coaching, consulting and group learning. Sarah is an author, speaker and instructor on coaching and leadership development and is recognized by CPA Practice Advisor and AICPA as one of the Most Powerful Women in Accounting and by Practice Ignition as one of the Top 50 Women in Accounting.

*Field of Study: Personal Development  
Skill Level: Overview*

2:00 – 2:50pm EST

CONCURRENT SESSIONS

#### **5A. Following Up with a Vengeance: Learn to Never Waste Money on Leads Again and Monetize & Capitalize on Your Current Client Base**

***Michelle Weinstein, The Abundant Accountant***

Following up is one of the easiest ways to boost your revenue and increase the number of potential clients coming through your door, but most accountants I speak to don't follow up at all! Having a solid follow-up system is crucial to your long-term success and without a system, you're just leaving money on the table! In this presentation today I'll teach you my simple yet effective and proven follow-up system that you can start implementing today. The Abundant Accountant is where accounting professionals come to learn how to build a winning accounting practice full of premium clients who pay you what you're worth. You'll never have to negotiate, compromise, or discount your fees ever AGAIN!



Michelle trains accountants on how to use her unique and proven system to sell more services at the fees you want, overcome any objection, and have a life full of abundance! Michelle truly wants to end the grind where you feel constantly frustrated and stressed, having no control over who you work with or knowing how much you can really charge (and not what you think the client can afford). At The Abundant Accountant, we've discovered what it takes to build a successful accounting practice full of clients who are more than happy to pay you what you're worth and learn how to be detached from the emotional side of the sales process, and how to have paradigm shifts that massively propel you forward. Michelle has successfully trained CPAs how to efficiently implement powerful techniques by adding \$10k to \$50k in additional revenue every month by making the sales process the nucleus of their business. Michelle is also the host of The Abundant Accountant Podcast where accounting professionals come to learn the most efficient and powerful ways to stop giving away their time and expertise away for free and start being paid their value and worth!

*Field of Study: Communications & Marketing  
Skill Level: Intermediate*

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## **5B. Unique Financial Planning Issues for Women**

***Sherri N. White, CPA/PFS, CKA, Ronald Blue Trust***

Statistically women live longer, are more likely to have career gaps, are the primary caregivers for aging parents, and are increasingly experiencing what has been coined “gray divorce”. These are just a few of the factors that create unique planning needs for women that often get overlooked, particularly with the challenges of a normal busy life. In this breakout session, Sherri White, CPA/PFS, CKA will share from over 20 years of experience working with women at all life stages, and help you identify steps you can take now to position yourself for both the expected and the unexpected in your financial future.



Sherri White is a Sr. Private Wealth Advisor for the Private Wealth division of Ronald Blue Trust in the Greenville, South Carolina office. Prior to joining Ronald Blue Trust, Sherri was a Senior Advisor and member of the Leadership Team at PlanFIRST<sup>SM</sup>. Sherri graduated from Wake Forest University with a Bachelor of Science in Accounting. She is a Certified Public Accountant, Personal Financial Specialist, and Certified Kingdom Advisor®. Sherri is a current Board Member and Program Committee Co-chair for the Greenville Chapter of the Accounting and Financial Women's Alliance, and a member of the American Institute of Certified Public Accountants and the South Carolina Association of Certified Public Accountants.

*Field of Study: Specialized Knowledge  
Skill Level: Overview*

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## **5C. Skyrocket Your Career by Building a Personal Brand**

***Ty Hendrickson, CPA, The Sales Seed***

Building a personal brand and network is incredibly important in achieving any and all career goals. It is never too early start building your circle of influence and it is never too late to fine tune it as well. The key to success is becoming intentional with building your personal brand and your circle of influence so that it becomes a powerful growth source for you in your career



Ty Hendrickson is a CPA, sales expert, and founder of The Sales Seed where she helps accounting firms grow through the integration of sales principles. With over ten years of experience leading sales teams and training programs for CCH and Bloomberg BNA, she empowers accounting firms to think outside of the box when it comes to growth. By implementing these strategies, her clients are distinguishing themselves as trusted advisors and are finding new growth opportunities in a highly competitive market. Ty is a contributing expert in the accounting industry, who has been selected to speak at conferences and events hosted by Accounting & Financial Women's Alliance, Association for Accounting Marketers, Alliot Global Alliance, CPAmerica, CCH User Conference, and more. Additionally, you can find her articles and insights featured in CPA Trendlines and the AFWA blog. Ty is based in Lexington, KY where she lives with her CPA husband and her two red-headed sons.

*Field of Study: Personal Development  
Program Level: Basic*

2:50 pm – 3:30 pm

EXHIBIT HALL VISITS – Snack & Break

3:30 – 4:20pm EST

CONCURRENT SESSIONS

## **6A. Managing Trusts in a Challenging Environment**

***Suzanne Lynch, Bernstein Global Wealth Management***

Today's environment holds many challenges. There is significant economic and tax uncertainty. Global investment yields are low which will limit future income and future return expectations will be lower than in the past. Beneficiaries are living longer; requiring trusts to last longer. In this session we will address: How can you maximize income in a low-yield market? -What investment allocations can safely support lifetime spending from a trust? How to balance the current and remainder beneficiaries. How can you reduce income taxes in a trust?



Suzanne Lynch is a Principal and Senior Investment Advisor in Bernstein's Chicago office. She joined the firm in 2002 as a financial advisor in the Chicago office, where she built and managed a large practice advising high-net-worth individuals and families. Suzanne later assisted with the launch of Bernstein's Denver office in 2005. Prior to joining the firm, she held various management positions within corporate development and finance at Mobil Oil and Steelcase. Suzanne holds a BS in business administration from Marquette University and an MBA from Nova Southeastern University, from which she graduated with honors. She is currently very involved in High Jump, a free academic enrichment program for Chicago middle-schoolers from families of limited financial means. She also supports The Latin School, and is a former board member of the River North Chicago Dance Company, where she led the company's education and outreach efforts. Suzanne enjoys travelling with her family and competing on the Evanston Golf Club ladies' golf team.

*Field of Study: Specialized Knowledge  
Skill Level: Intermediate*

## **6B. MOVE in Gear**

***Joanne Y Cleaver, president, Wilson-Taylor Associates, Inc. and project manager, Accounting MOVE Project***

The 2020 COVID pandemic was a rare chance for accounting & advisory firms to advance women in new ways. Continuing its decade-long partnership with the AFWA, the Accounting MOVE Project took the chance to focus on the implications and emerging best practices of accounting workplaces that needed more than ever to retain and advance women in new ways



Communication and content consultant Joanne Cleaver designed the MOVE Project, a research and advocacy platform that measures and supports the advancement of women. Since 2003, MOVE Projects have catalyzed the advancement of women in public accounting, cable television, transportation, and other industries. Cleaver was a financial journalist for 25 years, including 4 1/2 years as deputy business/real estate editor of the Milwaukee Journal Sentinel and two years as a senior content producer for Tribune Digital. She is a widely published writer and author of seven books, most recently, *The Career Lattice* (McGraw Professional, 2012). She leads strategic communication firm Wilson-Taylor Associates, Inc., which designs and manages content, editorial and research projects for all media and equips clients with media skills and strategic messaging.

*Field of Study: Communications & Marketing  
Skill Level: Intermediate*



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## **6C. Find Your Key Light**

**Jenette Jurczyk, BFA, MBA, Key Light Consulting, LLC**

Whether you are speaking to a single client or a room of hundreds, you are performing. Jenette Jurczyk, owner of Key Light Consulting, LLC and National Director of The She Said Project will share tools and techniques performers use to overcome nerves and speak with confidence. Learn how saying “Yes” can open you up to new ideas and inspire you to take chances in your career. Jenette uses her 20+ years of experience in theatre, plus her MBA and business acumen, to coach business professionals how to improve their public speaking and presentations. Be better prepared for your next interview, team meeting or presentation, by finding your “Key Light.”



Jenette Jurczyk is a coach and business development consultant, who specializes in helping her clients find their unique voice, step outside their comfort zone and bring their best self to any presentation or performance setting. With over 20 years of experience as a professional performer, director and producer, Jenette decided to get her MBA and founded "Key Light Consulting" to share the tools and techniques she learned as an actress with the professional world. Jenette uses improv-based training to inspire creative thinking, greater confidence and deeper connections with your audience. Jenette is the National Director of The She Said Project, an organization that raises women's voices through the power of storytelling. She has directed That's What She Said, a live performance of women sharing stories in Champaign, IL since 2015 and she launched the first show in Bloomington, IL in 2019. Jenette runs an empowerment program for teen girls called That's What Teens Say and hosts The She Said Project Podcast in partnership with NPR and Illinois Public Media. Jenette's enjoys sharing her unique experiences with others through interactive workshops and trainings, helping everyone find their “Key Light”.

*Field of Study: Communication & Marketing  
Program Level: Basic*



**Thursday, October 21, 2021**

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**10:00 am – 11:20 am**

**1.5 hour Early Bird Session TBD**

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**11:00 am - 12:00 pm**

**EXHIBIT HALL OPEN – LIVE**

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## **7A. How COVID is Affecting the Financial Health and Value of a Business**

**Vanessa Brown Claiborne, CPA/ABV, ASA, Chaffe & Associates, Inc.**  
**Nene Glenn Gianfala, CPA/ABV, CEIV, ASA-BV/IA, Valuation Advisory Group**

This session will provide an overview of the industries most impacted by COVID in both a positive and negative way. Plus provide an overview of how to value a business and how business owners can take advantage of the current economic environment for estate planning.



Ms. Claiborne has been with Chaffe & Associates, Inc. since 1987 and was promoted to President and Chief Executive Officer in 2009. She also serves as the Managing Director for the Valuation Advisory group. She is a Certified Public Accountant (CPA), Accredited in Business Valuations (ABV) by the American Institute of Certified Public Accountants and has received her designation as an Accredited Senior Appraiser (ASA) by the American Society of Appraisers. She holds Securities Licenses 79, 24, 27, and 63. Ms. Claiborne is Accredited in Estate Planning by the National Association of Estate Planners and Councils and a Certified Exit Planning Advisor by the Exit Planning Institute. Ms. Claiborne specializes in business valuation services primarily for estate and gift taxes, Employee Stock Ownership Plans (ESOPs), GAAP fair value reporting, financial reporting, corporate planning, litigation support including expert testimony, exit planning, and shareholder transactions and restructuring.



Ms. Gianfala is a Vice President of the Valuation Advisory group with over 12 years of experience in accounting, corporate finance, and business valuations. She joined Chaffe & Associates, Inc. as a Financial Analyst Intern in June 2007, and upon completion of the internship, joined the company. She is a Certified Public Accountant (CPA), Accredited in Business Valuations (ABV), Certified in Entity and Intangible Valuations by the American Institute of Certified Public Accountants (CEIV), and an Accredited Senior Appraiser in Business Valuations with a specialty in Intangible Assets (ASA-BV/IA) by the American Society of Appraisers. Ms. Gianfala performs intellectual property and intangible asset valuations for purchase price allocations, impairment testing, internal intangible asset management, portfolio valuation and litigation support. Ms. Gianfala provides business valuation services to public

and private companies for estate, gift and income tax planning, financial reporting, corporate planning, business interruption claims, employee stock ownership plans and litigation.

*Field of Study: Specialized Knowledge*  
*Skill Level: Basic*

## **7B. How to Establish Creditability Early in your Career**

**Madeline Trimble, Assistant Professor, Department of Accounting, Illinois State University**

This session aims to open a dialogue about what it takes to establish creditability and stand out early in your career. We will discuss strategies on how to establish trust, self-promote effectively, practice expectation management, and much more. The session is open to those seeking advice and those willing to share advice. The session will be highly interactive.



Madeline Trimble is an Assistant Professor in the Department of Accounting at Illinois State University where she teaches financial accounting, international accounting, and international business. She completed her doctorate from the University of Mannheim in Germany with a focus on international accounting. She has published her research in top journals including *The International Journal of Accounting* and the *Journal of International Accounting, Auditing and Taxation*, among others. Additionally, she serves as a national board member of the Accounting & Financial Women's Alliance as incoming Secretary and as the AFWA-ISU chapter faculty advisor. She is a two-time *Wisdom's Torch Award* recipient, was voted

*Professor of the Year* by ISU's Student Accounting Society, and won an *Outstanding Teaching Initiative Award* and an *AFWA Women Who Count Award* in 2020. She volunteers with the Money Mentor program in her community and loves to travel.

*Field of Study: Personal Development*  
*Skill Level: Basic*

## **7C. Mastering Client Engagement**

**Holly O'Donnell, DISC Certified, Slone Solutions, LLC**

Discover how consistent and unwavering client engagement builds brand loyalty. This interactive and engaging presentation will influence team implementation for a sustainable culture and build a proactive mindset for service recovery.



Engaging and thought provoking, Holly O'Donnell has a captivating energy that sparks conversations and instantly engages a room. As a leadership and communication specialist, she combines over 20 years of consulting and training expertise to speaking engagements, team building sessions, and consulting opportunities. With a passion for developing teams and shifting the cultural thread of an organization, Holly O'Donnell helps others realize how they impact and contribute to the success of an operation. Influenced by working with Lincoln Motor Company, Walt Disney World, Mandalay Resort Group, Benchmark Hospitality and Dale Carnegie Training, Holly brings versatility, confidence and wit to every presentation, connecting powerfully with every audience.

*Field of Study: Communications & Marketing  
Skill Level: Intermediate*

**1:00 – 2:15 pm**

**Foundation lunch and 1 hr. CPE – TBD**

**2:30 – 3:20pm EST**

**CONCURRENT SESSIONS**

## **8A. Forensic Accounting**

**Dina Broydo, Senior Associate, FILS, BDO**

Do you know your company risks from fraudulent activity? How do you detect fraud and respond? What are the organizational risks and penalties? What are the current trends in regulatory enforcement? This session will explore these questions along with the psychology of fraud and what makes people commit fraud as well as the importance of preventing fraud using your own data and corporate ethics and compliance programs.



Dina is an experienced forensic accounting professional that leverages analytics and visualization to gain efficiencies while executing fraud investigations, anti-bribery/anti-corruption compliance audits and third-party risk assessments, and litigation and expert testimony support engagements for clients involved in disputes. Dina's career focus has been on Corporate Compliance and Anti-Corruption and Anti-Bribery, specifically Third-Party monitoring, but she has experience with expert testimony reports in civil matters and litigation support. Dina has a dual degree from the University of Maryland in Information Systems and Accounting with a minor in Business Analytics.

*Field of Study: Accounting  
Skill Level: Intermediate*

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## **8B. What's Around the Corner? Finance Hiring & Compensation Trends for 2022**

***Kimberly Stiener-Murphy, Senior Vice President, Robert Half***



Confidence is high in the employment market, especially when it comes to CPAs, financial analysts and those with a nose for numbers. The outlook is also upbeat as the economy recovers and businesses are hiring again. But with the return to a candidate-driven market, is your company prepared to face fierce competition for skilled financial talent? And if you're on the job hunt, do you know what you're worth? Kimberly Stiener-Murphy is a Reno-based Senior Vice President for global staffing firm Robert Half, overseeing multiple divisions, including Accountemps, OfficeTeam, Robert Half Finance & Accounting, Robert Half Salaried Professional Services and Robert Half Healthcare. Kimberly joined the company in 1997 as a Staffing Manager for Robert Half's OfficeTeam division and has since progressively increased her roles of responsibility. She has more than 20 years of experience in staffing and human resources and is also a decorated U.S. Air Force Veteran. Kimberly has appeared on television and in print many times throughout her career and is a subject matter expert on career and HR trends affecting the current labor market.

*Field of Study: Personnel/HR  
Skill Level: Overview*

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## **8C. 3 Keys to Developing Independent Leaders (And Freeing Up Your Time!)**

***Erin Daiber, CPA, PCC, Well Balanced Accountants, LLC***

As leaders, we know that developing our team members is key to freeing up our time & energy. But leading and teaching takes time, and when not done with care, can result in inefficiencies and frequent interruptions. Where did all of that free time go? In this session, we will explore ways to become super-effective in leading and developing your team, allowing you to truly free yourself up to take on higher level tasks or, simply have more free time. Avoid burnout and gain more balance in your life after attending this session. We will share case studies and real-life success-stories of how busy professionals have implemented these tools and approaches, successfully bringing themselves back from the brink of burnout. This session will be interactive, including frequent opportunities to share personal challenges and wins.



Erin is a relatable and results-oriented CPA turned coach, speaker & trainer in the accounting profession. She is the founder of Well Balanced Accountants LLC, the creator of popular programs such as the CPA Exam Launchpad. She is known for her fresh approach to providing leadership development solutions designed specifically for your team of accountants. Well Balanced Accountants started after she went from a high-performing accountant to a burned-out, now-recovering CPA. She believes that leadership skills are integral to long and successful careers in the accounting profession. As a speaker, she shows accountants how to develop the skills they need to unleash the potential in themselves and others. Her clients successfully use that potential to attract and retain top talent, grow profits and best serve their clients. In her years of working with CPAs & accounting firms, she has helped solo practitioners and Top-100 firms transform their accounting talent using these practices.

*Field of Study: Personal Development  
Skill Level: Intermediate*

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**3:20 pm – 4:20 pm**

**EXHIBIT HALL – LIVE**



## The Financial Journey of Women

**Brian S. Bohn, CPWA, CFP, CPFA, The Gleason, Bohn, Floberg Group- Merrill Wealth Management and Olivia N. Brinker, Senior Portfolio Advisor, Financial Advisor, Merrill Wealth Management**

52% of the wealth in the United States is held by Women, but the financial services industry continues to lag behind. This workshop will address the unique challenges and obstacles that face women investors while creating a roadmap for financial success. Some obstacles include the lack of finance based editorial content in magazines, the biases that women face in financial education, and the lack of resources that support women investors. We will also discuss the demographic differences between men and women and the details surrounding health care planning & ensuring financial independence.



Brian has been in the Financial Services Industry since 2012 and with Merrill since 2014. As a partner of The Gleason, Bohn, Floberg Group, Brian brings experience in working with individuals and families financially navigate their lives. He is acutely focused on details; merging comprehensive financial planning with behavioral finance. A sought after speaker, Brian travels across the region educating attorneys, CPA's, and other professionals on the latest strategies in personal finance. Brian was also named to Forbes "Best-in-State Next-Generation Wealth Advisors" list in 2019.\*



Olivia Brinker works with clients at Merrill providing wealth planning strategies to local female business owners, families, and retirees. In a world filled with complexity at many levels, Brinker strives to provide psychological comfort to each client, as she listens deeply and works purposefully managing their wealth and legacy. She refers to her clients as extended family in the community she lives in, where she also contributes a lot of her time on a volunteer basis. Brinker is a board member for Wesley Family Services, where she volunteers her time to help improve this organization which serves children and family with disabilities across the US. She is also a board member for the Chatham University Alumni Board, MBA alumna 2016. Olivia strives to continue to help provide guidance to current students of the university, where she volunteers to teach classes on "Effective Networking" and "Building Your Own Brand". Brinker is President of the Western PA Women's Exchange for Merrill Lynch Bank of America - A forum for women in wealth management divisions to share ideas and experiences, offer support to one another, and promote personal, career and leadership development. Brinker is the awardee of **"The Pittsburgh Business Times 30 Under 30"** Award for 2020. Lastly, in February 2021, Olivia served as a leader in the Pittsburgh community, serving as a mentor for the Pittsburgh Business Times, along with 40 other publications across the country, hosting Bizwomen Mentoring Monday for the seventh year – She is committed to the advancement of women in business.

*Field of Study: Finance*  
*Skill Level: Intermediate*

**ACCOUNTING & FINANCIAL  
WOMEN WHO COUNT  
VIRTUAL CONFERENCE  
OCT. 18-22, 2021**



**Friday, October 22, 2021**

12:00 – 12:50pm EST

CONCURRENT SESSIONS

**9A. Best Practices for Defending an IRS Exam**

***Guinevere Moore, Managing Member, Moore Tax Law Group, LLC***

You or your client (or you and your client) receive a notice that the IRS has selected your client's tax return for examination – Now What? Learn best practices for communicating with clients during an IRS exam; Understand practitioners' duties when representing clients before the IRS; Learn how to think proactively about possible risks in IRS exams; Master the art of properly responding to Information Document Requests and requests for taxpayer interview to preserve your clients' rights in litigation; Identify special audit situations and learn to handle appropriately; Develop strategies for working with IRS Appeals ; Learn how to identify and avoid conflicts of interest and, if necessary, resolve them or withdraw.



Guinevere Marie Moore is a tax litigator who represents taxpayers in civil and criminal tax controversies. She advocates for taxpayers at the IRS examination and appeals levels and, if a settlement with the IRS cannot be reached, in litigation. She is also the Executive Director of US Partnership Representative, Inc., and in that role she serves as a professional partnership representative. Ms. Moore has represented taxpayers throughout her career and draws on her experience in working with her clients, with the IRS, and with opposing counsel to help craft and execute the best possible plan to resolve the issues her clients are facing. Ms. Moore has successfully defended taxpayers against assessment of all types of federal tax, including income tax, employment tax, estate tax, gift tax, civil penalties, and criminal penalties. Ms. Moore's significant experience in practicing before the IRS and the United States Tax Court enables her work together with her clients to determine the best path forward to resolving the tax dispute - whatever Internal Revenue Code section may be at issue. The Internal Revenue Code contains thousands of provisions, and no tax professional has encountered them all. But having years of experience with the procedural hurdles that a taxpayer has to jump through in order to resolve a disagreement with the IRS over how much tax is due facilitates a much easier journey towards agreement or resolution through litigation. She is a powerful and seasoned advocate in and out of the courtroom. Ms. Moore is a frequent speaker at national and local conferences on topics related to tax, ethics, and the ethics of tax. She routinely published in Forbes, Bloomberg Tax, and Tax Notes. She is a well-known member of the tax community and is actively involved in the American Bar Association, Section of Taxation. She is the Chair of the Standards of Practice Committee of the Section of Taxation. In that role, she designs programming designed to ensure certain ethical standards are met in tax representation nationwide. Ms. Moore is also actively involved in the Accounting and Financial Women's Alliance (AFWA), where she serves as Member of the Board of Directors. Ms. Moore draws on her many years of experience as a member of the Tax Bar to provide advise and insight to others.

*Field of Study: Taxes  
Skill Level: Intermediate*

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## **9B. Cognitive Biases – Lessons for the Workplace**

***Jason Swiergol, Managing Director, Protiviti***

Cognitive biases are part of our daily life and involved with most decision making. Consequently, it's important to understand how these biases can influence decision making and how to use these errors of judgement to improve decision making.



Jason is the Managing Director in the Phoenix office where I lead the local IT Consulting and IT Audit practice. His focus areas are IT Operations Improvement, Business Continuity, Intelligent Automation, Portfolio and Program Management, IT Governance and IT Audit. Jason's background in Design Thinking enables him to help clients solve complex problems with unique and innovative human-centric solutions. Prior to arriving at Protiviti, Jason was a communications officer in the Air Force for five years. He worked primarily in Space Command with a focus on managing and delivering IT projects. Jason has a Bachelor of Science from the United States Air Force Academy and an MBA (Finance) from the University of Colorado-Colorado Springs.

*Field of Study: Behavioral Ethics  
Skill Level: Basic*

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**1:00 pm - 2:00 pm**

**AFWA Awards & Lunch**

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**2:00 pm – 3:30 pm**

**CLOSING KEYNOTE**

### **Resilience is a Choice - 4 Decisions Essential to Weathering Unrelenting Stress**

Based on more than 100 interviews with leaders and team members, Eliz shares insights to weather the stress of crisis and change. She discovered that highly capable people are often unequipped to deal with the stress of an unsolvable situation. For them, the stress of dealing with vulnerability amplifies the stress of crisis and change. Ultimately, resilience is a choice. We choose to move forward in the face of failure, crisis, tragedy, pain, or life-altering (and business-altering) events we can't control. Understanding your reaction to vulnerability is essential to becoming resilient.



Surviving a heart attack at age 35 while seven months pregnant with twins propelled Eliz Greene on a mission to share her story to inspire other busy people to pay attention to their health. Recognizing stress as an essential and often under-addressed risk factor, Eliz conducted a research study on job stress. Her latest book, *Stress-Proof Your Life*, offers implementable strategies to combat uncertainty, overcome overwhelm, and improve performance and quality of life. She was named as a Top Online Influencer on Stress and Heart Health. She's been seen on CNN, PBS, Lifetime, TNT, and many national and local news programs. A national spokesperson and advocate for the American Heart Association, Eliz received the Heart Hero Award in 2010. Today, Eliz enjoys life with her wonderful husband, Clay, their

beautiful (now adult) daughters.

*Field of Study: Personal Development  
Skill Level: Overview*