

TOPIC & SPEAKER INFORMATION

ACCOUNTING STANDARDS/FASB UPDATE

Attend this session for a general update on the latest accounting standards and their impact on financial statement preparers and auditors. You'll walk away with an understanding of the key concepts of new standards, a general process for implementing the new standards and the ability to develop an action plan for addressing the relevant new accounting standards within your organization.

Speakers: MICAH CLINGER
JACK LAMKIN III

BUILDING THE ULTIMATE NETWORK THROUGH BRANDING AND SERVANT LEADERSHIP

In this session, we'll define what a personal brand is and the evolving process behind building your own image in order to support both the building of your network and its value. You'll hear the presenter's personal experience on what it means to be a servant leader and the importance of adding value to the community through helping others. Walk away ready to live out your developed personal brand in more than just the business world.

Speaker: ERIC HOLLEMAN

CPAs SERVING ON NONPROFIT BOARDS

Thinking of serving on a nonprofit board? Attend this session for a road map to help CPAs evaluate nonprofit board service opportunities. Discussion will cover expectations and responsibilities, areas of expertise provided by board members, and challenges within the board role.

Speaker: LYNNE MABRY

FACING THE CYBER THREAT: HOW SECURE ARE YOU?

The news today is filled with data breaches, government hacks, loss of information and general consumer distrust. Even though companies and individuals are making strides in securing their environments, it is clear that the nefarious actors are one step ahead of security teams. This non-technical discussion is a look into the mind of the attacker, the methods used and the social engineering tactics that work to separate unsuspecting people from their personal information and companies from their critical data.

Speaker: ERIC BALLANTYNE

FINANCIAL EXECUTIVES ROUNDTABLE

Hear from three seasoned executives who will discuss the challenges they incur conducting the financial function of large and small, private, public and nonprofit organizations. Panelists will describe financial duties and translate their experiences from the management of contemporary financial systems.

Speakers: BETH BULL
DAVID CHAVENSON
LOREN GREAVES
PAUL WILLEY (MODERATOR)

FROM BALLOTS TO BENEFITS: HOW STATE AND NATIONAL ELECTION CYCLES AFFECT THE HEALTH CARE INDUSTRY

Because the federal government purchases about half of the health care in the U.S. every year, politics and health care are inextricably linked. Cost and inflation pressure flows from the government to medical providers to employers and, ultimately, to employees and their families. Each election opens the curtain on a new act in the grand play. Den Bishop will clear the political fog to provide a clear vision of what has to happen to truly solve the health care cost dilemma. He refers to himself as "an equal opportunity offender" and puts both liberal and conservative bias aside to present a true public private partnership that can work for the government, your company, and your employees and their families.

Speaker: DEN BISHOP

GENERATIONAL LEADERSHIP

The generational makeup of organizations is changing daily. Accordingly, the demands of, and strategies employed by, today's leaders require continual reconsideration in order to best lead a team. This session focuses on generational traits and trends of today's workforce. It will provide considerations and strategies that can be employed that will be effective using the common threads throughout all generations discussed.

Speakers: KENNY BROOM
TIM PIKE

GIFT AND ESTATE TAX DEVELOPMENTS OVER THE LAST YEAR, DECADE, 40 YEARS, AND MAYBE COMING SOON

While most of the Code and Regulation provisions are the same, as a practical matter the federal estate, gift, and generation-skipping transfer taxes have undergone profound changes over both the last decade and over the last forty years. This course will consider the impact on our clients of these changes in the transfer tax laws. The course will also discuss the most significant judicial, legislative, regulatory, and administrative developments over the last year, and current discussions regarding legislative changes will also be analyzed.

Speaker: PHILIP M. LINDQUIST

GOING CONCERN ASSESSMENT - IT'S YOUR RESPONSIBILITY NOW, MANAGEMENT

This presentation will cover key provisions and terminology of FASB ASU 2014-15, Presentation of Financial Statements – Going Concern. This new standard requires management to perform a going concern evaluation for all interim and annual financial statement reporting periods and determine appropriate disclosures. The material will provide an overview of key provisions, terminology, examples of conditions and considerations for management's evaluation and disclosure requirements.

Speaker: KATHY SCHROCK

GUIDANCE OR NO GUIDANCE, THE NEW PARTNERSHIP AUDIT RULES ARE COMING!!

Ready or not, the new partnership audit rules are coming, and all tax professionals need to be prepared. The IRS proposed regulations were introduced and then put on hold. In addition, proposed legislative fixes have not been enacted. This session will be a discussion of what this means and what to expect between now and the end of 2017.

Speaker: JOEL CROUCH

LEASING IS HERE - NOW WHAT?

This session will provide participants with an overview of the recently issued leasing guidance. The discussion will include lessons learned, as well as some of the challenges preparers have discovered as they consider their implementation journey.

Speaker: CHAD SOARES

LEGISLATIVE UPDATE

This session will provide an overview of the major legislative activity in the 85th Session of the Texas Legislature that is nearing an end on May 29, 2017. The focus of the session will be on various tax and other issues of interest to CPAs, including progress on the TSCPA legislative agenda for 2017. In addition, the speakers will discuss some of the broader issues the legislature is dealing with that can affect the state and its citizens such as the state budget, efforts to reduce property taxes and funding for education.

**Speakers: GEORGE W. RENDZIPERIS
JOHN M. SHARBAUGH**

NEW DYNAMICS IN QUALIFIED PLANS POST PENSION PROTECTION ACT OF 2006

This session gives interested professionals an overview of the Pension Protection Act of 2006 (PPA) with respect to qualified plans. It examines the impact PPA has on qualified plan designs both at the employer and participant level (i.e. the elimination of the IRC § 404(a)(7) contribution restrictions). The session covers the impact on tax deductibility for calendar year plans and plan years that overlap tax years; IRC § 404(a)(6). Discussion will also cover both IRC § 415(b)(1)(a) and IRC § 415(c)(1)(a) benefits and allowable contributions from the perspective of both PBGC plans and non-PBGC plans under the new law, with emphasis on incidental benefits and highlighting the utility of IRC § 401(h), a post-retirement individual medical/dental reimbursement plan.

**Speakers: ZAK KENNE
JOHN LALONDE**

NOT-FOR-PROFIT TAX UPDATE AND A LOOK AT WHAT CHANGES MAY BE AHEAD

Attend this presentation for an update on the most significant changes affecting the not-for-profit world, including an analysis of changes to the code and regulations, as well as recent cases with an impact on nonprofits. The discussion will also cover the proposed changes being discussed by Congress.

Speaker: AUSTIN C. CARLSON

ON THE ROAD AND AT RISK: ADDRESSING TAX ISSUES CREATED BY BUSINESS TRAVELERS

In today's global economy, business travel is necessary for a company to thrive. However, business travel between states or countries can create costly tax exposures for both employees and the company. Recent legislation and heightened regulatory scrutiny have given new urgency to multi-jurisdiction compliance. Learn about the most common tax risks created by employee travel, as well as best practices for identifying and managing multi-jurisdiction exposures.

**Speakers: JOHN JENNINGS
ANUPAM SINGHAL**

RETIREMENT BENEFITS PLAN: FIDUCIARY GOVERNANCE UPDATE

Employers sometimes have a muddled view of what fiduciary responsibility means in their role as retirement plan sponsors. They may underestimate their fiduciary duties, overlook critical fiduciary functions or mistakenly believe that someone else holds primary fiduciary responsibility. The failure to fully execute the fiduciary duties ERISA imposes upon 401k plan employers and administrators can lead to significant liability exposure. The confusion over the DOL Fiduciary Rule, and the current review of the rule, adds confusion for plan sponsors, plan auditors and plan advisors. This course will provide a roadmap of how to navigate these critical responsibilities.

**Speakers: TOM DITZER
GEORGE LOLLIS
JASON LUTER
RANDY T. NICHOLS**

RETROACTIVE STATE TAX LEGISLATION

State legislators are enacting retroactive amendments to tax laws with increasing frequency and sometimes with no justification other than to raise revenue. This activity is a matter of serious concern to the state taxpayer community and is an issue raised in several recent U.S. Supreme Court Petitions, one of which (Dot Foods) currently is pending before the court. This session will provide details regarding recent state tax retroactive legislation, explain the legal standard previously established by the court for the review of such challenges and analyze the legal arguments currently being raised by states and taxpayers regarding how the current standard should be interpreted.

Speaker: MARY KAY McCALLA MARTIRE

TOPIC & SPEAKER INFORMATION

SEC FINANCIAL REPORTING ENFORCEMENT UPDATE

The U.S. Securities and Exchange Commission (SEC) has increasingly prioritized enforcement actions involving public company accounting, financial disclosures, internal controls and auditor performance and independence. Attend this session and learn about the recent trends in SEC enforcement in these areas, as well as expected hot-button issues for 2017, and what the change in administration may mean to SEC enforcement. The discussion will also cover the efficiencies the SEC is gaining from greater whistleblower reporting and the increased use of big data to identify, investigate and prosecute violations.

Speaker: DAVID L. PEAVLER

SOCIAL SECURITY & REVERSE MORTGAGES

Recent changes to Social Security may make it more difficult for individuals to wait until age 70. A bridging strategy is required that allows individuals to retire early, while still delaying their Social Security benefits until age 70. With only three available options – liquidate assets, continue to work, use a reverse mortgage – CPAs need to explore the pluses and minuses of reverse mortgages to advise clients of what they are and where they might fit in a master financial plan.

Speaker: DAVID P. ZANDER

TAX LEGISLATIVE OUTLOOK POST-2016 ELECTION

Attend this session and take a look at the political outcomes from 2016 and how they impact 2017 policy choices, specifically on the prospects for and shape of possible tax reform options. Participants will understand the tax technical issues that may arise in tax reform and assess their likelihood for planning and strategic outlook purposes.

Speaker: DONALD G. CARLSON

THE FBAR: EVERYTHING YOU NEED TO KNOW

Attend this session to learn about international asset reporting obligations related to the infamous Report of Foreign Bank and Financial Accounts (FBAR). Participants will hear about hot and current issues related to FBAR reporting, including an update on recent case law and guidance. Attendees will also learn about the fundamental rules necessary to identify FBAR issues and to properly prepare FBARs, as well as available programs to address prior FBAR missteps and how to avoid them in the future.

Speaker: JASON B. FREEMAN

THE IMPACT OF LONGEVITY ON YOUR CLIENTS AND YOUR COMPANY

Since 1950, average life expectancy has increased by 20 years. This increased life expectancy has created both opportunities and challenges for those who are planning for an active, fulfilling and financially secure retirement. This presentation discusses the priorities that clients and employers must consider when planning for financial wellness over the course of a 20, 30 or even 40 year retirement. Incorporating the findings from recent Bank of America Merrill Lynch research studies, this session will focus on the impact of longevity on decisions around health and health care, the role of work in retirement, the effect of family dynamics on retirement decisions, financial considerations and pitfalls for pre-retirees and the unique decisions facing women as they move into their older years.

Speaker: CYNTHIA L. HUTCHINS

TOP TEN MISTAKES EMPLOYERS MAKE AND HOW TO KEEP FROM MAKING THEM

Employment claims are on the rise and continue to cost employers time and money. This session will review common mistakes employers make and give guidance on avoiding costly mistakes and reducing your company's legal risks of being sued. Additionally, the session will address potential landmines regarding leave issues and how to navigate through FMLA, ADA and worker's compensation issues.

Speakers: ASHLEY SCHEER
DAVID SCHLOTTMAN

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