



**BRIDGING
THE GAP**



TRI-MERIT
SPECIALTY TAX PROFESSIONALS

AGENDA

Monday, July 22

MAIN BALLROOM

- 7:00 AM** | **Registration & Breakfast**
- 8:15 AM** | **Opening Remarks**
Randy Crabtree
- 8:25 AM** | **KEYNOTE | Train Your Brain & Master Your Mind**
Robb Zbierski
- 9:35 AM** | **The Epic Talent Crisis in Accounting: Is Outsourcing the Right Choice for Your Firm?**
Hitendra Patil
- 10:55 AM** | **Happy, Healthy & Wealthy: Wellness Tips for Accountants**
Kasidy Kersey
- 11:50 AM** | **Lunch**
- 1:10 PM** | **Live Build Automation**
Chad Davis
- 2:20 PM** | **Empowering the Next Generation: The Impact of Adjunct Lecturing in Accounting**
Orumé Hays
- 3:40 PM** | **Navigating the Ethical Landscape: The Use of AI & Tax Planning Software**
Dominique Molina
- 4:50 PM** | **PANEL | Vulnerability As A Strength - Superhero Accountants Take Off Their Masks**
Dawn Brolin, Nancy McClelland, Hector Gacia & Nayo Carter-Grey
- 5:45 PM** | **Day One Closing Remarks**
Randy Crabtree

BREAKOUT ROOM

- 9:35 AM** | **Improv Techniques for Strengthening Business Relationships**
Jennifer Dymond
- 10:55 AM** | **Q&A | Tax Talk with Tri-Merit & the IRS**
Barry Devine & IRS Rep: Dan Arnell Belarmino
- 1:10 PM** | **Gen Z Culture**
Roman Villard
- 2:20 PM** | **Automate, Eliminate, Delegate**
Nayo Carter-Grey
- 3:40 PM** | **Having a Plan for Your Own Mental Health**
Matthew May
- 4:50PM** | **Content Marketing for Accountants**
Terrell Turner



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Tuesday, July 23

MAIN BALLROOM

- 7:00 AM** Registration & Breakfast
- 8:15 AM** Opening Remarks
Randy Crabtree
- 8:25 AM** **KEYNOTE | Leading with Loyalty: The Power of Integrity and Intention**
Dawn Brolin
- 9:35 AM** **Cultural Alchemy: Unleashing Accounting's Transformative Potential**
Richard Kopelman & Dan Hood
- 10:55 AM** **Renewable Energy Tax Credits Overview**
Barry Devine & Randy Crabtree
- 11:50 AM** Lunch
- 1:10 PM** **Business Model Transformation Strategies**
Jennifer Wilson
- 2:20 PM** **PANEL | Outsourcing Best Practices**
Kristen Keats, Maanoj Shah, Charles McKissick & Kenji Kuramoto
- 3:40 PM** **WISP: It's the Law: Getting Your Firm Compliant Without Being a Techie**
Andrew Lassise
- 4:50 PM** **PANEL | EOS Implementation**
Roman Villard, Chad Davis, Nick Pantaleo & Gaynor Meilke
- 5:45 PM** **Day Two Closing Remarks**
Randy Crabtree

BREAKOUT ROOM

- 9:35 AM** **The Art of Alignment: Balancing Your Firm, Your Team, Your Clients and Yourself**
Twyla Verhelst
- 10:55 AM** **Maximizing Your Leadership Value with an Executive Assistant**
Kristen Rampe
- 1:10 PM** **Righting Retention: How to Turn Down Turnover**
Geof Brown & Kristen McGill
- 2:20 PM** **Nourish Your Mental Wellbeing: Building Self-Care Practices to Prevent & Reduce Burnout**
Francesca Reicherter
- 3:40 PM** **The Imposter Syndrome & Advisory**
Sean Suncan
- 4:50PM** **Dealing with Partners: Experiences From Two Partners Who've Managed Not to Kill Each Other Yet**
Kenji Kuramoto & Matthew May



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AGENDA

Wednesday, July 24

MAIN BALLROOM

- 7:00 AM** | **Registration & Breakfast**
- 8:15 AM** | **Opening Remarks**
Randy Crabtree
- 8:25 AM** | **KEYNOTE | Leadership Lessons I Wish Someone Had Taught Me Before I Was a Leader**
Allan Koltin
- 9:35 AM** | **Inside Out: How to Prioritize Mental Health to Build a Thriving Accounting Firm**
Al-Nesha Jones
- 10:55 AM** | **How to Market & Sell Virtual CFO Services**
Jody Grunden
- 11:50 AM** | **Extended Break with Refreshments**
- 12:15 PM** | **SALT: Everything You Need to Know About State and Local Tax Litigation**
Jordan Goodman
- 1:10 PM** | **Creating a Culture of Collaborative Innovation**
Heath Alloway
- 2:05 PM** | **Closing Remarks & End of Conference**
Randy Crabtree

BREAKOUT ROOM

- 9:35 AM** | **Are You at the Table? Or Are You on the Menu? Belonging, Integrity & Inclusion**
Brian Streig & Dave Kerstig
- 10:55 AM** | **PANEL | Balancing the Books and the Mind: Mental Health in Accounting**
Randy Crabtree, Chase Birky, Kellie Parks & Kristen Keats
- 12:15 PM** | **PANEL | Small Firm Acquisition: The Good, The Bad & The Ugly**
Andrea MacDonald, Kristen Keats, Michael Ly & Seth Fineberg

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