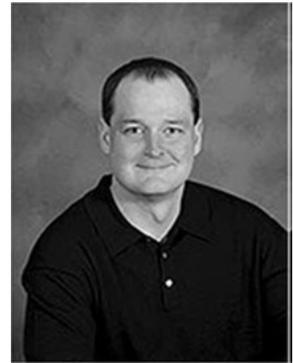


# Speaker Information

## Pete Bieghler, CPA

Pete Bieghler, CPA, specializes in providing audit effectiveness and efficiency training, as well as additional training services for accounting firms and government agencies throughout North America.

Before joining AuditWatch, Pete was a Senior Audit Manager at Katz, Sapper & Miller (KSM) in Indianapolis. At KSM, he was a member of the firm's Audit Efficiency Task Force. Prior to KSM, Pete was an Audit Manager at Crowe Chizek in Elkhart, IN and Indianapolis, IN.



Pete is a member of the American Institute of Certified Public Accountants. He earned his undergraduate degree from Ball State University.

**Presentation:** Internal Control Documentation



**CPAAI**  
CPA ASSOCIATES INTERNATIONAL

# Speaker Information

## Michael Bottala, CPA

Michael is the western sales representative and resident CPA for MindBridge based out of Los Angeles, California. After earning his bachelor's and master's in Accounting, Michael spent 4 years in public accounting before making the switch to MindBridge. Michael joined MindBridge with the goal of educating and leading accounting firms into the future by helping them implement new technologies such as artificial intelligence.



**Presentation:** Bringing Artificial Intelligence to Financial Audits

**Presentation Description:** Artificial Intelligence (AI) is set to disrupt many professions and the future of auditing and accounting will certainly involve AI. In this session, we will look at the factors which are bringing about this disruption:

Objectives:

- Gain business level understanding of AI technology and history of the technology:
  - The history and evolution of AI
  - Factors that are bringing about this disruption
- Develop an understanding of how AI impacts the accounting industry and the current use within the profession:
  - Impact on accounting industry and financial statement analysis
  - Demonstration of current software usage of technology

# Speaker Information

## Salvatore A. Collemi, CPA

Salvatore A. Collemi, CPA, licensed as a CPA in New York and New Jersey, is the Managing Member and Founder of Collemi Consulting and Advisory Services, LLC where he relies on over two decades of global business experience to guide U.S. and International public accounting firms, litigation attorneys, valuation experts, the C-suite and related institutions that support the profession in order to promote and enhance audit quality.



His practice provides outsourced high-level strategic and technical accounting and auditing guidance. Services include a full range of U.S. and international accounting and auditing consultations, technical reviews of financial statements and workpapers, AICPA Peer Review and PCAOB inspection preparation, perform internal inspections, customized CPE training, independence and ethics consultations, etc. Salvatore is also a keynote speaker at company retreats and conferences. His past work experience at the U.S. Securities and Exchange Commission (SEC) and the AICPA, combined with his previous roles as external auditor and technical partner to both national and international public accounting firms, gives him a keen understanding into the mindset of both regulators and standard-setters that he shares with his clients.

As a recognized subject matter expert on International Financial Reporting Standards (IFRS), Salvatore was named by the AICPA as an official participant in the development and review of IFRS questions for the Uniform CPA Examination and served as the IFRS Expert-at-Large for the AICPA Board of Examiners Content Committee from 2011-2014. Salvatore also served as AICPA liaison to the International Federation of Accountants (IFAC) Transnational Auditors Committee and Global Peer Review Subcommittee to assist in the development of an international quality assurance review program.

For more information about Salvatore, visit <https://collemiconsulting.com/> and LinkedIn.

### **Presentation:** 2019 Accounting and Auditing Update

This session is a must in order to keep you on top of the continuing changes in the public accounting profession. There are many significant changes in the technical accounting standards, professional standards and quality control standards. Sal will provide practical and insightful guidance and application including standards' review and implementation guidance, where appropriate.

Topics to be covered are:

- Accounting Standard Updates (ASUs)
- FASB Projects
- Audit service issues
- ARSC initiatives, preparation, compilation and review updates, and initiatives
- AICPA activities and Profession Update



# Speaker Information

## Carl R. George, CPA

When Carl started with Clifton Gunderson in 1971, the total firm value was \$1.8 million, and when he stepped out of the CEO role in a planned succession in 2009, Clifton's volume was \$250 million. Carl served 13 years as COO and 16 years as CEO of Clifton Gunderson, with his last three years as Senior Executive Partner focused on CPA firm acquisitions and consulting with CPA firms. Carl was part of the team that completed the CliftonLarsonAllen (CLA) merger (combined volume of \$550 million) in 2012.



As CEO for Clifton Gunderson, Carl was recognized numerous times by Accounting Today as one of the top 100 Most Influential People in Accounting.

He is a former board member of the American Institute of Certified Public Accountants (AICPA) and is passionate about solving the nation's financial literacy crisis, having chaired the AICPA National CPA Financial Literacy Commission for five years. He also served on the AICPA MAP committee for six years, three as chair, and has served as a speaker or moderator at many conferences and retreats on practice management issues and solutions.

Since his retirement from CLA in 2012, Carl continues his work on leadership development, and practice management issues as a consultant to CPA and professional service firms through Carl George Advisory, LLC, formed in 2013, and has been recognized as one of the Top 10 Most Recommended Consultants by INSIDE Public Accounting.

Carl George Advisory, LLC  
Carlgeorgeadvisory.com

### Leading and Innovating Change - Get Comfortable with Being Uncomfortable

- Culture is the Foundation of Success
- Firm of the Future
- Leadership Attributes of the Best
- Senior Partners and Their Role
- Aligning Governance and Structure for a Growing Firm
- Aligning Partner Accountability and Compensation with Firm Strategy
- Here's What I Would Do-30 Recommendations and Best Practices in Running Your Firm
- 30-Minute Q&A Session (mics in audience and question cards ahead of session/during session)

Continued...

# Speaker Information

## Hot Buttons and Takeaways

### Hot Buttons from Morning Plenary Session

- What is your take on the Firm of the Future?
- Has your firm's governance and structure evolved the firm's growth?
- Does your partner compensation system align with the firm's vision?
- What are your key takeaways from the morning plenary session, and how will you implement them?

### Hot Buttons from June Managing Partners' Conference

- What is the #1 barrier to partners becoming trusted advisors in your firm?
- Why do clients leave in your firm, and what have you done about it?
- Has client loyalty waned? Why? What can we do about it?
- What are your key takeaways from the June MP conference, and how will you implement them?

## Leadership Development Program



# Speaker Information

## Heidi Henderson

Heidi is the Executive Vice President of Engineered Tax Services (ETS) and operates the Ogden, Utah office. ETS is headquartered in West Palm Beach, FL and has 16 offices nationally. ETS is a licensed Engineering firm focused on specialty tax services relating to federal tax incentives and strategies for Real Estate owners.

Heidi is a Real Estate Professional with over 15 years of tax and accounting experience in the Real Estate Finance, Development, Construction, and Commercial Property Areas.



Heidi has published numerous articles in AccountingToday among other CPA and Real Estate publications, and has spoken to audiences ranging from AIA, USGBC, Energy Symposiums, AICPA, varying International CPA Associations, and AccountingToday's national symposium, qualifying for Continuing Professional and Legal Education. Topics range between energy efficient options for Real Estate owners, depreciation, tax methodologies, and over tax efficiency. Heidi holds an undergraduate degree in Business and Accounting and also owns a Real Estate Investment and Management company, KIMIDI, LLC in Utah where she resides with her husband, three children, and a multitude of furry friends.

**Presentation:** The Word on the Hill: A Legislative Update on Specialty Tax and Opportunity Zones

# Speaker Information

## Adelaide Ness

As an Executive Vice President, Adelaide is a speaker, trainer, coach and consultant to accounting firms around the world. Adelaide's strengths are in marketing, branding, communications, leadership and business development. For over twelve years she has been working with accounting firms to help them build stronger cultures and stronger brands by encouraging excellence and consistency at all levels in a firm. She does this through curriculum development that addresses each firm's unique challenges and strengths and through energetic and impactful training that keeps firms excited about growth. Adelaide teams up with Julie McPherson, Vice President, in the training of The Rainmaker Academy, the premier leadership and business development program to the industry. More recently, Adelaide has spearheaded and oversees the development of Video Module training and records these to supplement growth efforts inside of firms.



Adelaide is a bilingual and bicultural citizen of the United States and France. Her unique background gives her the ability to connect with people around the world. As a consultant, her capacity to understand the cultural differences and nuances of various locales makes her a valuable asset to The Rainmaker Companies. Her previous role was as Executive Director of Enterprise Worldwide, an international association of independent accounting firms. She continues to work with firms around the world for their training and consulting needs.

Adelaide has her BA from Vanderbilt University and her MA from the American University of Paris. Adelaide and her husband, Matthew, have three young children, Eleonore, Josephine and Charles-Henri and two dogs, Napoleon and Elsa (yes, like the princess.)

**Presentation:** Leadership Development Program

# Speaker Information

## Guy Sanschagrín, CPA/ABV, MBA

Guy is a Principal at WTP Advisors and Leader of the firm's transfer pricing and valuation practice. He has extensive experience providing transfer pricing, valuation, economics consulting and business process improvement consulting. Guy's expertise includes supply chain, risk assessment, transfer pricing design, cost sharing, exit charge/intangibles valuation, Advance Pricing Agreements (APAs), OECD and local country/U.S. documentation and business valuation for M&A transactions, partnership buy in transactions, minority shareholder disputes and tax purposes.



Prior to WTP, he completed a three-year assignment as Ernst & Young Belgium's national transfer pricing practice leader. Early in his career, Guy was an industrial engineer performing and leading dozens of business process improvement initiatives. He is a frequent speaker at seminars and webinars. The March 28, 2016 issue of Tax Notes International includes Guy's article, "Assessing Value Creation for Transfer Pricing." Guy has been named by Euromoney / Legal Media as one of the top transfer pricing advisors in the world.

Guy holds an MBA in Finance and International Business from the University of Chicago's Booth School of Business. Additionally, he holds a BS in Industrial Engineering from Boston's Northeastern University. Guy is also a Minnesota licensed CPA, a Minnesota Society of CPAs member, and an AICPA member. He is certified as Accredited in Business Valuation (ABV) by the AICPA.

Guy served on the Global Minnesota's (FKA Minnesota International Center) Board of Directors and as the Treasurer / Chair of the Finance and Audit Committee and a member of the Executive Committee. Guy currently serves as president and on the board of directors of the Minnesota Association of Business Valuation Professionals (MABVP).

**Presentation:** International Tax Update

# Speaker Information

## Brian Schwam, JD

Brian is the National Managing Director in charge of WTP's International Tax practice. He has more than 30 years of experience as an international tax practitioner. Brian has significant experience providing U.S. international tax and cross border tax advice related to local country tax planning, foreign tax credit and repatriation planning, transfer pricing, global cash management, foreign tax credit utilization, earnings and profits, and export incentives.



Brian has extensive experience working with companies of all sizes in obtaining optimized export incentive benefits under the Foreign Sales Corporation, Extraterritorial Income Exclusion (ETI), and Interest Charge-Domestic International Sales Corporation (IC-DISC). Brian has extensive experience establishing the IC-DISC, maintaining the qualification of the IC-DISC, optimizing the tax benefits of the IC-DISC, and sustaining those benefits before the IRS. Brian understands the unique interplay between the IC-DISC and the foreign tax credit as well as how the IC-DISC and foreign source income interplay with the new 199A QBI deduction.

Before joining WTP in 2010, Brian was the co-founder and managing director for the Wisconsin practice of U.S. Tax Advantage, LLC, an international tax specialty consulting firm. Prior to that he was the Milwaukee office practice leader for international tax services and export incentives for Ernst & Young and KPMG, delivering international tax services to both publicly traded and closely held businesses.

**Presentation:** International Tax Update

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**Presentation:** International Tax Update