



INCPAS.ORG



CPAs IN BUSINESS AND INDUSTRY CONFERENCE

JUNE 21, 2017 | RITZ CHARLES, CARMEL
CPE 8 HRS (INCLUDES UP TO 1 HR A&A) | CLE: 5.7 HOURS

CONNECT | SHARE KNOWLEDGE | HAVE FUN



3RD
YEAR
REPORTING CYCLE

CPAS IN BUSINESS AND INDUSTRY CONFERENCE

JUNE 21, 2017 | RITZ CHARLES, CARMEL
CPE 8 HRS (INCLUDES UP TO 1 HR A&A) | CLE: 5.7 HOURS

Network and share knowledge with local professionals in manufacturing, insurance and other industries, and gain 8 hours of affordable CPE.

FOR MORE INFORMATION:
PHONE: (317) 726-5000
TOLL FREE: 1-800-272-2054
FAX: (317) 726-5005
EMAIL: INFO@INCPAS.ORG
WEB: INCPAS.ORG



INDIANA CPA SOCIETY
8250 WOODFIELD CROSSING BLVD.
SUITE 100
P.O. BOX 40069
INDIANAPOLIS, IN 46240

NONPROFIT
US POSTAGE
PAID
INDIANAPOLIS, IN
PERMIT NO. 154



“Session options are what I look for and what make the conference valuable to me. This year they were spot on – I got takeaways from every session I attended!”

– 2016 participant

DISCLAIMER: The information and suggestions presented at the classes, seminars and institutes sponsored by the Indiana CPA Society are subject to constant change, and therefore, should serve only as a foundation for further investigation and study. Further, any forms presented at such classes, seminars or institutes are samples only and are not necessarily authoritative. All information, procedures and forms contained or used in such classes, seminars or institutes should be very carefully reviewed and should serve only as a guide for use in specific situations. INCPAS and contributing authors/lecturers hereby disclaim any and all responsibility or liability, which may be asserted or claimed, arising from or claimed to have arisen from reliance upon the information or utilization of the information or forms used in such classes, seminars and institutes. The opinions expressed by teachers, seminar leaders and discussion panelists are not those of INCPAS. Continuing education courses purchased from INCPAS may be deductible for federal income tax purposes as ordinary and necessary business expenses. Continuing education course purchases are not deductible as charitable contributions. Please consult your tax advisor for individual assistance in specific situations. Under IRS Code Section 62 (effective 1/1/94), 50 percent of the cost of business meals held in conjunction with association meetings are generally deductible. Inquire with INCPAS as to what portion, if any, of your registration fee represents direct meal cost.

Cancellation Policies: \$15 service fee for cancellations or switches received 15 business days or more prior to the program date; \$25 service fee for cancellations or switches received six to 14 business days prior to the program date; Nonrefundable registration fee for any INCPAS-sponsored conference cancellations or switches received five business days or less prior to the conference.

It is the policy of the Indiana CPA Society, Inc. (“Society”) that any Society member or other person who attends a Society event, function or meeting consents to the Society’s use of that member or attendee’s name, voice, likeness, or image in Society advertising, fundraising, promotional, or educational materials, in any medium whatsoever, without payment of additional consideration to the member or attendee. By participating in or attending Society events, each member or attendee understands and agrees that (i) the Society may record or document its events with photographs, audio and/or video recordings, and other media; (ii) the Society will own any such photographs, audio and/or video recordings or other media; and (iii) the Society may utilize such materials, including without limitation, posting any such photographs, audio or video recordings, or other media on the Society’s website, for any purpose the Society deems appropriate. Any member or attendee objecting to the possible use of his or her name, voice, likeness, or image in this manner shall communicate in writing his or her objections to or limitations on such use to the Society.



CPAs IN BUSINESS AND INDUSTRY CONFERENCE

7:30 a.m.
Registration

8:30-9:30 a.m. General Session
Indiana Economic Update
Gerry Dick, *Inside INdiana Business*

9:30-9:40 a.m.
Networking Break

9:40-10:55 a.m. Breakout Sessions
**A. Introduction to Data Analytics and
Microsoft PowerBI Tools**
Bryan Smith, CPA, CITP, CISA, *CPA Crossings,
LLC*

B. Pitfalls to Avoid in Employee Relations
Nathan A. Baker, J.D., *Barnes & Thornburg
LLP*

C. A&A Update
Martin J. Birr, CPA, CIA, CMA, *Kelley School
of Business*

10:55-11:05 a.m.
Networking Break

11:05 a.m.-12:20 p.m. Breakout Sessions
**A. Microsoft PowerBI - Fundamentals of
Power Query**
Bryan Smith, CPA, CITP, CISA, *CPA Crossings,
LLC*

(This session builds on the Introduction to Data Analytics
and Microsoft PowerBI Tools session; however, you do
not need to take both sessions)

B. Fresh Views from the Benefits Frontlines
Karl Ahlrichs, SPHR, *SHRM-SCP* and Dennis
Nash, *Gregory & Appel*

**C. Fraud & Embezzlement: Lessons from the
Trenches**

H. Bryan Callahan CPA, CFE, CFF, CVA, *BKD,
LLP*

12:20-1 p.m.
Conference Luncheon

1-2 p.m. Lunch Speaker
**The Battle for Talent: Selecting and
Retaining Top Performers**
Sarah Turner, *Faurote Group*

2-2:10 p.m.
Networking Break

2:10-3:10 p.m. Breakout Sessions
**A. Office 365 - Software Applications
Lightning Round Review**
Bryan Smith, CPA, CITP, CISA, *CPA Crossings,
LLC*

**B. Leadership Progression - Doer to
Delegator to Developer of Others**
Sarah Turner, *Faurote Group*

C. Federal Tax Update
Jenny Ray, CPA, *Somerset CPAs, P.C.*

3:10-3:20 p.m.
Networking Break

3:20-4:30 p.m. Closing General Session
**What All Businesses Should Know about the
Internet of Things**

George A. Gasper, J.D., and Stephens E.
Reynolds, J.D., *Ice Miller LLP*

4:30 p.m.
Adjourn

SPONSORS

PLATINUM SPONSOR



GOLD SPONSOR



2017 CPAs IN BUSINESS AND INDUSTRY CONFERENCE REGISTRATION

MEMBER ID No.

FULL NAME

FIRM/COMPANY

WORK Ph. No.

EMAIL

STREET ADDRESS (NO P.O. BOXES)

WORK / HOME
(circle)

CITY

STATE

ZIP CODE

CHECK ALL THAT APPLY

New Address


Member of Another State Society

(LIST _____)



Lunch provided
in the cost of
registration.

REGISTRATION FEES METHOD OF PAYMENT

 **EARLY BIRD** (register by May 31 and save \$25)

Member Registration \$244 AMEX Discover MasterCard

Nonmember Registration \$395 Visa Check

NAME ON CARD

CREDIT CARD No.

EXP. DATE

CVV No.

SIGNATURE

Do you require special accommodations to participate?

Yes

No

No refunds for cancellations or switches received by phone or mail after June 14.

EMERGENCY INFORMATION: Add and display your emergency information on your smartphone so it will display even in lockscreen mode. Check for the feature in your phone settings or download an I.C.E. (In Case of Emergency) app.

Visit incpas.org/bi to register as well as receive session descriptions, an up-to-date agenda, and program details.



AT THIS YEAR'S CONFERENCE



- **Inside INdiana Business:** Hear from television host Gerry Dick on the state's business and economic issues.
- **Get Them and Keep Them:** Learn how to master the art of attracting, selecting, developing and retaining top talent for your organization.
- **The Internet of Things:** Find out what's in it for you if you seize the right opportunities.
- **Customize Your Day:** Choose from breakout sessions on the upcoming overhaul of employee benefits; employee relations pitfalls to avoid; person-based leadership; fraud and embezzlement trends and safeguards; Office 365 programs; Microsoft PowerBI tools; A&A update; and federal tax update.

YOUR CONFERENCE COMMUNITY



Conference registrants will have access to the CPA Center of Excellence® CPAs in Business and Industry Conference Online Community, where you can:

- Get event updates and directions
- Download conference materials
- Communicate with speakers and fellow attendees
- Reference the discussions and resource materials up to a year after the conference

INCPAS.ORG/BI

- Learn More
- Read Session Descriptions
- Register Online

LOCATION:

Ritz Charles
12156 N. Meridian St.
Carmel, IN 46032
(317) 846-9158

PROJECT TEAM:

Samantha Bush, CPA
Sherry L. Dick, CPA, CLM
Curtis Kent, CPA, CGMA
Melanie King, CPA
Linda Lutz, CPA, CGMA
Daniel Meiklejohn, CPA