



“I applaud the topics for the general sessions, as those seem to be of universal interest and all had great speakers. I also appreciated the variety of breakout topics.”

— 2016 attendee

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Presented by The National Bank of Indianapolis
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Providing Real Time Information
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AT THIS YEAR'S CONFERENCE



- **CFO, Controller or Both:** How to wear multiple hats and deliver exceptional value.
- **Ethics Don't Come in 31 Flavors:** Find out more about the best practice decision-making processes for ethics.
- **Accounting Standards Update:** Overview of the recent Presentation of Financial Statements of Not-for-Profit Entities.
- **Bring a Client or a Colleague:** Do you know a team member or client who needs to get up to speed on not-for-profit best practices? Bring them!

YOUR CONFERENCE COMMUNITY



Conference registrants will have access to the CPA Center of Excellence® Not-For-Profit 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/NFP

- Learn More
- Read Session Descriptions
- Register Online

LOCATION:

Indianapolis Marriott East
 7202 E. 21st St.
 Indianapolis, IN 46219
 (317) 352-1231

PROJECT TEAM:

CHAIRMAN - Jennifer McVey, CPA	Dorothy Hornbaker, CPA
Brian Baker, CPA	April Huey, CPA
Kelly Gerber, CPA, CGMA	Kevin Moore, CPA
Jennifer Grady, CPA	James Schaefer, CFE, CIA, CISA, CPA-Inactive
Michelle Helton, CPA	Brad Schelle, CPA



NOT-FOR-PROFIT CONFERENCE

Presented by The National Bank of Indianapolis

7 a.m.

Registration

7:30-8:15 a.m.

CFO Roundtable Breakfast (optional)
CFOs must register to attend - look for invitation via email

8:30-9:50 a.m.

Opening General Session
Accounting Update (A&A) (Yellow Book)

Richard Cole, CPA, CGMA, *Financial Accounting Standards Board*

9:50-10 a.m.

Networking Break

10-11 a.m.

Breakout Sessions

A. Excel - Auditing Your Spreadsheets for Maximum Accuracy

Bryan Smith, CPA, CISA, CITP, *CPA Crossings, LLC*

B. Simple and Effective Methods for Strengthening Internal Controls to Combat Fraud Opportunities (A&A)

Chris DuKate, CPA, *Crowe Horwath LLP*, Kevin Kerswick, CPA, *Crowe Horwath LLP* and Ann Merkel, *The National Bank of Indianapolis*

C. Maximizing the Lifetime Value of Your Donors for Fundraising Success

Jay Love, *Bloomerang*

11-11:15 a.m.

Networking Break

11:15 a.m.-12:15 p.m.

Breakout Sessions

A. Introduction to Data Analytics and Microsoft's Power BI Tools

Bryan Smith, CPA, CITP, CISA, *CPA Crossings, LLC*

B. Time for a UBI Check-Up (A&A)

Emilie Knieriem, CPA, and Rachel Spurlock, CPA, *Crowe Horwath LLP*

C. Revenue Recognition (A&A)

Richard Cole, CPA, CGMA, *Financial Accounting Standards Board*

12:15-1 p.m.

Conference Luncheon

1-2 p.m.

General Session

CFO, Controller or Both: How to Wear Multiple Hats and Deliver Exceptional Value

Jon Lokhorst, CPA-Inactive, *Lokhorst Consulting LLC*

2-2:10 p.m.

Networking Break

2:10-3:10 p.m.

Breakout Sessions

A. Managing NFP Information Technology Risks

Ryan R. Elmore, *Katz, Sapper & Miller, LLP* and Dan Resnick, *KSM Consulting*

B. Presenting Financial and Complex Information

Rob Norris and Rhonda Tamulonis, *When You Leave the Room*

C. The Ticking Time Bomb: Don't Get Caught Without a Succession Plan

Jon Lokhorst, CPA-Inactive, *Lokhorst Consulting LLC*

3:10-3:25 p.m.

Networking Break

3:25-4:45 p.m.

Closing General Session

Ethics Don't Come in 31 Flavors (Ethics)

Daniel Porter, CFE

4:45 p.m.

Adjourn

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Lunch provided in the cost of registration.

REGISTRATION FEES METHOD OF PAYMENT

EARLY BIRD (register by June 29 and save \$25)

Member Registration \$244 AMEX Discover MasterCard

Nonmember Registration \$395 Visa Check

Bring a Client or Colleague \$149

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 July 13.

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