

## 2026 CPA Technology Conference: AI Tools, Data and Digital Transformation

### Agenda

Tuesday, June 30, 2026

Virtual Live



CPE: 8 hours

#### Conference Description:

There is little doubt that we are in the midst of unprecedented transformation in the services we provide as CPAs and CFOs and the way we deliver them. Technology, of course, is at the core of this transformation. Therefore, it is imperative that you place emphasis on learning about current and emerging technologies that can empower you to be more productive, profitable and most importantly today, innovative in your service delivery. This conference is designed to inform you of how to take advantage of today's technology tools such as artificial intelligence, data analytics and digital communications to compete in this rapidly evolving environment and grow your business and your professional skills.

#### 9 – 10:15 a.m. General Session (75 mins)

##### 2026 Technology Update: Emerging Trends That Matter

[John Higgins, CPA, CITP, Higgins Advisory, LLC](#)

The event will kick-off with a macro level review of the rapidly evolving technology landscape presented by nationally recognized CPA technology advisor, John Higgins, CPA.CITP. We will delve into the pivotal technology trends reshaping accounting and tax services. We will review an array of technologies including cloud computing, big data and data analytics, Artificial Intelligence (AI), blockchain technology and digital assets, financial / ERP software, audit and tax software.

#### 10:15 -10:20 a.m. Break (5 mins)

#### 10:20 – 11:20 a.m. General Session (60 mins)

##### From Numbers to Narratives: Mastering Data Analysis for CPAs

[Bryan Smith, CPA, CITP, CISA](#)

In today's rapidly evolving business landscape, accounting professionals are expected to be more than just number crunchers; they must also serve as insightful interpreters of data. In an era where data is king, this session is your gateway to becoming a savvy data analyst with a competitive edge in your field. This session will guide you through the intricacies of making complex data analysis approachable and engaging. You will learn the all-important data analysis process flow that will take you from collecting data to making insightful decisions. It's not just about learning a tool – it's about enhancing your professional identity as a forward-thinking accounting professional.

#### 11:20 – 11:25 a.m. Break (5 mins)

#### 11:25 a.m.–12:40 p.m. General Session (75 mins)

##### ChatGPT/Google Gemini/Microsoft 365 Copilot Shootout

[John Higgins, CPA, CITP, Higgins Advisory, LLC](#)

As we enter the fourth year of the generative AI revolution, we must get more focused on selecting the AI applications to provide the foundation for our application of artificial intelligence. The options are vast, however, there are a few clear leaders in the space. This session will provide an interactive comparison of three of the leading solutions; ChatGPT,

Google Gemini and Microsoft 365 Copilot. We will compare these three power tools to help you in your decision-making process. Whether already have established your solution, this session will also help you to better understand the full range of generative AI capabilities.

## **12:40–1p.m. Lunch Break (20 mins)**

### **1 – 2:15 p.m. General Session (75 min)**

#### **AI Powered Excel: Transforming Workflows with Copilot and ChatGPT**

[Bryan Smith, CPA, CITP, CISA](#)

This session provides a comprehensive overview of how Microsoft Copilot & ChatGPT transform traditional Excel workflows into dynamic, AI-driven processes, enabling you to accomplish tasks faster, more accurately, and with less manual effort. Whether you're a seasoned Excel user or just beginning your journey, this session will guide you through practical applications and best practices to make the most of Copilot's & ChatGPT's capabilities. Through hands-on demonstrations you will see how each of these AI tools can save time, improve decision-making, and elevate your analytical skills to new heights.

## **2:15–2:20 p.m. Break (5 mins)**

### **2:20–3:25 p.m. General Session (65 mins)**

#### **Microsoft 365: Supercharging CPA Productivity**

[John Higgins, CPA, CITP, Higgins Advisory, LLC](#)

Microsoft 365 is one of the most underutilized software solutions across all organizations. This session will show you how to unlock the full potential of Microsoft 365. Dive deep into the hidden gems of Microsoft 365 that can elevate your productivity and streamline your processes. Learn practical tips and innovative strategies to leverage the suite's powerful tools more effectively. Whether you're looking to enhance collaboration or optimize task management, this session will equip you with the knowledge to transform your workflows.

## **3:25–3:30 p.m. Break (5 mins)**

### **3:30–4:20 p.m. General Session (50 mins)**

#### **AI-Enabled Marketing Strategy for Firms**

[Gaynor Meike, MS, CBC, CTC, CTRC-E](#)

This presentation introduces accounting and professional services firms to the practical, high-impact ways artificial intelligence (AI) can strengthen and scale their marketing strategy. Participants will learn how AI technologies support content creation, client targeting, campaign optimization, and analytics—while maintaining brand integrity and compliance. Through demonstrations, frameworks, and real-world examples, the session provides a clear roadmap for integrating AI into existing marketing workflows to improve efficiency, consistency, and measurable results.

## **4:20 p.m. – Adjourn**