

Corporate Finance Forum Agenda
Tuesday, June 23, 2026
Indiana CPA Society – Indianapolis, IN



CPE: 8 hours (includes up to 1 hour of Ethics)

Please plan to bring your laptop to the conference to fully participate in the AI workshop and practice what you learn in real time.

8:30–9:40 a.m. General Session (70 mins)

AI: Better Prompts, Better Results

[Randy Johnson, K2 Enterprises](#)

Generative AI is seemingly everywhere, and business professionals are embracing the technology. And for good reason – generative AI offers enormous opportunities for gains in efficiency and productivity. However, those gains can be even greater if you understand best practices for issuing AI prompts.

In this session, you will learn the best ways to ask questions of your AI platforms so that you get the information you seek quickly and easily. Stop wasting time with inefficient and ineffective prompts! Learn the best ways to get the information you seek!

9:40–9:50 a.m. Break (10 mins)

9:50–10:55 a.m. General Session (65 mins)

AI Workshop: Implementing What We've Learned

[Randy Johnson, K2 Enterprises](#)

Generative AI tools are quickly becoming part of everyday business workflows. Many professionals have learned the basics of prompting, yet they often struggle to consistently produce reliable, useful results. The difference typically lies in how prompts are structured, refined, and applied to real tasks. This practical workshop goes beyond theory, focusing on turning prompt concepts into repeatable techniques that professionals can apply immediately in their daily work.

Participants will practice building structured prompts, refining responses through iterative prompting, and generating formatted output ready for reports, communications, and analysis. The session also addresses responsible AI use, including security and privacy considerations when interacting with commercial AI platforms. At the end of the workshop, attendees will have practical prompt templates, strategies to improve AI output, and clear guidance on using AI tools productively while protecting sensitive information.

10:55–11:05 a.m. Break (10 mins)

11:05 a.m.–12:05 p.m. General Session (60 mins)

Managing Workload and Establishing Boundaries for Today's CPAs

[Amanda Leonardi, SHRM-CP, MP: Wired for HR](#)

This session would address the reality of increasing workloads and limited authority, focusing on how CPAs can communicate capacity, set boundaries, and manage priorities without appearing uncooperative. The discussion would frame boundaries as a professional skill that protects quality, reduces risk, and supports sustainable performance, while also

exploring evolving staffing models and contractor options that can help organizations manage workload demands more effectively.

12:05–12:45 p.m. Lunch Break (40 mins)

12:45–1:55 p.m. General Session (70 min)

Professional Etiquette in a Hybrid Digital Workplace

[JoDee Curtis, CSP, SHRM-SCP, CPA, Purple Ink](#)

This session would explore how workplace norms have evolved in a hybrid, digital-first environment and how professionals can communicate more effectively across platforms. Potential focus areas include virtual meeting etiquette, email versus chat expectations, responsiveness standards, managing tone and professionalism across digital channels, and navigating communication within multigenerational teams.

1:55–2:05 p.m. Break (15 mins)

2:05–3:20 p.m. General Session (75 mins)

AI Governance in Practice: Building Policies Before the Risks Build Themselves

[Stacey Dennis, SHRM-SCP, Possibilities Unlocked](#)

AI tools are already embedded in professional practice—often without formal governance. Only 21-40% of organizations have an AI use policy, which means the majority are operating without guardrails on data confidentiality, decision-making integrity, and vendor accountability. This session equips professionals with the frameworks to evaluate AI risks, vet vendors ethically, and build defensible policies before regulators or plaintiffs do it for them.

Upon completion of this session, participants will be able to:

1. Distinguish between narrow AI, generative AI, and agentic AI—and identify which types are currently operating in professional environments.
2. Recognize the primary risk categories of AI use in professional practice: bias, hallucination, and data leakage.
3. Apply five essential vetting questions when evaluating AI-powered vendors or tools.
4. Construct the core components of an organizational AI use policy aligned with ethical obligations.
5. Identify current AI regulations affecting professional practice and employment decisions.

3:20–3:30 p.m. Break (10 mins)

3:30–4:30 p.m. General Session (60 mins)

Trust but Verify: Using AI Ethically Without Losing Professional Skepticism

[Karl Ahlrichs, SPHR, SHRM-SCP, CSP, ExpertSpeaks](#)

Buckle up and be safe! The speed of AI adoption is outpacing governance, ethics training, and regulatory frameworks - which means right now, you're the guardrail between innovation and catastrophe. This comprehensive program equips professionals with the critical frameworks, policies, and practical techniques needed to responsibly leverage AI tools while maintaining professional standards and regulatory compliance.

Participants will explore the ethical implications of AI adoption, learn to establish robust governance frameworks using a 10-component AI policy structure, and develop prompt engineering skills specifically designed for complex accounting scenarios.

Major Topics

- Ethical challenges in AI adoption for accounting and other professionals, including accountability, transparency, regulatory compliance, psychological impacts, and the risks of AI-generated errors.
- The 10-component AI policy framework for establishing governance, approved uses, data security, quality controls, compliance standards, internal controls, bias testing, training requirements, and incident response protocols.
- Professional skepticism and critical thinking techniques for auditing AI outputs, including the Question/Doubt-Investigate-Validate-Decide process for identifying hallucinations, bias, and accuracy issues.

4:30 p.m. – Adjourn