



## K2'S EXCEL MASTERY FOR ACCOUNTING PROFESSIONALS CONFERENCE

# AGENDA

DECEMBER 14, 2026 · VIRTUAL CONFERENCE · CPE CREDIT: 8 HOURS

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Excel is an indispensable tool for accounting and financial professionals, yet many still aren't using it to its full potential. That's where the Winter Excel Conference comes in. Join this exclusive, one-day virtual seminar designed to elevate your Excel skills and transform how you work. Catering specifically to accountants, CPAs, and financial professionals, this dynamic conference will teach you to leverage Excel's powerful features and adopt best practices that maximize efficiency, improve security, and boost productivity.

**10:30 a.m.**

### **Microsoft 365 Mastery: When Everything Works Together**

**Brian Tankersley** · K2 Enterprises

Most accounting professionals utilize only a fraction of the power available within their Microsoft 365 subscription, often treating Word, Excel, and Outlook as isolated islands. This session moves beyond basic app usage to focus on the "unified ecosystem" advantage—the seamless integration of data, security, and user provisioning that allows a firm to operate as a single, cohesive unit. We will address the common frustration of "app overload" by demonstrating how Microsoft 365 serves as a turnkey solution that replaces disconnected tools with integrated workflows that simply work together. Participants will explore the strategic shift from traditional file servers to a cloud-centric environment where data is accessible anywhere, at any time, on any device. We will dive into high-impact collaboration techniques, including real-time co-authoring across Excel, Word, and PowerPoint,

**12:10 p.m.**

■ VIRTUAL BREAK

**12:20 p.m.**

## **K2's Dynamic Arrays in Excel**

**Tommy Stephens** · K2 Enterprises

Dynamic arrays can be a tremendous time-saver in Excel, but most business professionals remain unaware of what should be a commonly used tool. With dynamic arrays you can reduce the time you spend creating and updating formulas and improve your accuracy at the same time. You can also take advantage of some innovative features associated with dynamic arrays to automate many calculations and data entry tasks. If you've yet to discover dynamic arrays, make plans to participate in this session to learn how you can take advantage of this terrific feature.

**2:00 p.m.**

■ VIRTUAL BREAK

**2:30 p.m.**

## **Data and Statistical Analytics Using Microsoft Excel**

**Tommy Stephens** · K2 Enterprises

The role of the financial professional has shifted from reporting on the past to predicting the future, yet many practitioners still rely on manual, static workflows that fail to capture the full story within their data. This course bridges the gap between traditional accounting and modern data science by utilizing Excel's most powerful analytical engines to turn raw numbers into defensible business intelligence. We will move beyond simple averages, exploring how to use the Analysis ToolPak for deep statistical dives and leveraging Dynamic Arrays to build fluid, auto-updating models that respond to changing business conditions in real time. Participants will explore a modern analytics workflow that balances classic statistical rigor with cutting-edge efficiency. We will examine how to implement regression analysis for more accurate budgeting, utilize advanced forecasting functions.

**4:10 p.m.**

■ VIRTUAL BREAK

**4:20 p.m.**

## **Elevating Excel Productivity with Microsoft Copilot**

**Lawrence A. "Mac" McClelland** · [K2 Enterprises](#)

Many professionals already use Copilot to generate text and summarize meetings, among other activities. But few use Copilot to improve their productivity with Excel. In fact, Copilot can help even advanced Excel users to become more efficient, effective, and productive when working with Microsoft's ubiquitous spreadsheet application. In this session, you will learn how you can use Copilot to elevate your Excel game by in many areas, including data preparation and cleaning, creating formulas, analyzing data, writing scripts, and creating effective visualizations.

**6 p.m.**

## **Conference Adjourns**