

# Adapting and advancing

The AICPA & CIIPA Annual Summit for  
Accountants & Finance Professionals

Nov. 25–26, 2019

Kimpton Seafire Resort + Spa



## Session Overview

<b>Day 1: Government Update</b> <i>Hon Roy McTaggart</i>		
<b>Economic Update</b> <i>Joe Brusuelas, RSM</i> Joe Brusuelas provides macroeconomic perspective to help understand and anticipate issues impacting the global economy while tying that knowledge back to the Cayman Islands economy. This discussion will explore the implications of the current geo-political climate for the economy and examine the reasons why the financial market response anticipates a number of pro-growth actions.		
<b>Select One</b>	<b>Dual Careers Ladders: The Technical and the Business</b> <i>Jennifer Skinner &amp; Laurie Mernett, Deloitte</i> An examination of the challenges of promoting technical experts into management roles. Thoughts on creating meaningful career ladders for development and preparing the leaders of tomorrow.	<b>Making Lemonade out of LuLu Lemons</b> <i>Chris Bailey, PwC</i> Succession planning for key management and business continuity. This session will develop deeper understanding of what succession planning is, what makes it work and human nature in relation to both succession planning and business continuity.
<b>Finding Your Everest</b> <i>Sara Safari, Find your Everest</i> Every day we deal with different obstacles to reach our goals, electrical engineer Sara Safari pushed herself out of her comfort zone to learn to climb mountains and tackle Everest. After surviving a 7.8 earthquake at 20,000 feet, her life changed. Now she uses her experience to share with others how to use adversity and struggle to improve leadership and face challenges head on.		
<b>Select One</b>	<b>Global Trends in Taxation</b> <i>Robert Moncreif, Jude Scott, Hafiz Choudhury</i> A deep dive into the tax world from both a jurisdictional and international perspective	<b>Human Capital: The True Cost of a Bad Hire</b> <i>Steve McIntosh, CML Recruitment</i> In this session participants will learn a framework for understanding how human resources drives company value, the vital importance of recruitment and training, and best practice techniques for avoiding "bad hires".
<b>Select One</b>	<b>The CPA as Coach: Essential Coaching Skills</b> <i>Jon Lockhorst, Lokhorst Consulting LLC</i> Gain an understanding of why coaching is uniquely effective for developing your employees and why younger generations crave it from their leaders. Learn essential skills and how to employ them. Observe coaching in action from a professional coach.	<b>The Importance of IPSAS and Improving Government Decision Making</b> <i>Rob Whiteman, CIPFA</i> In a global economy recovering from the sovereign debt crisis accruals based accounting and transparent financial reporting are fundamental to good decision making and better societal outcomes. Drawing on CIPFA's case studies and global experience, Rob Whiteman will address how International Public Sector Accounting Standards (IPSAS) can support that aim.

## Day 2: Reimagine

*Barry Melancon, AICPA*

The digital era has brought about a blistering pace of change that's only getting faster. It's rapidly resetting consumer expectations and challenging organizations to disrupt themselves to remain relevant. This discussion will look at how technology can be used to enhance quality in existing service areas and provide opportunities in new service areas as well as how to evolve skillsets in an increasing digital world.

<b>Select One</b>	<b>The Challenges in auditing Digital Assets</b> <i>Petri Basson, KPMG</i> In this course we'll cover the challenges in getting comfortable with the auditing of digital assets: Custody, existence and ownership, accuracy and completeness of data, valuation and smart contracts.	<b>Energy Escalators: Health Behaviors to Work Well and Play More!</b> <i>Marcey Rader, Work Well. Play More!® Institute</i> Power up your productivity, creativity, and health by learning simple ways to amp up your performance at work and home. Marcey uses evidence-based research to focus on what works, rather than what's currently popular and will leave you with new strategies to incorporate simple behavior changes to escalate your energy.
<b>Select One</b>	<b>Blissfully Unconscious: How Bias is impacting women in the Workplace</b> <i>Yasmine El-Ramly, AICPA</i> Each of us brings a lifetime of experiences and cultural influences that create our unique mental programming or non-conscious expectations that affect the judgments of ourselves and others. In this session, we will hold a conversation about unconscious bias and how it affects women in the workplace.	<b>Ethics &amp; Financial Crime</b> <i>Alison Dunkley and Lise Corbin, Deloitte</i> The financial industry is increasingly concerned about the rising sophistication of financial crimes, including money laundering, terrorism financing, cybercrime, fraud, tax evasion, bribery and internal threats from employees. The presentation will explore the interplay between financial crime and ethics and address the importance of embedding an ethical culture within organisations.
<b>Will There Still Be Accountants in Twenty Years, if so, How Will They Add Value</b> <i>Rob Whiteman, CIPFA</i> Automation, artificial intelligence, and block chain are all promising to bring big changes to how we undertake financial management, audit and accounting. The financial professionals of the future will need to demonstrate more complex skills and undertake an increasingly strategic role, focusing on planning and resourcing. They will need to understand and encompass digital technology, exponential growth in the availability of data and adapt to changes in work practices. Making this happen means getting the right strategies in place now. If the accounting and finance profession can get this right, it can build a high-performance workplace, encourage a learning environment and contribute to a more diverse workplace.		
<b>Select One</b>	<b>Pivoting to an Inclusive Flexible Workplace for Moms and Millennials</b> <i>Kristen diFalco, Viaggio Partners, Inc.</i> Women currently make up more than 60% of the accounting profession, and by 2020 more than half of the workforce will be millennials and Gen Zers. With more ways to stay "connected" than anyone can count, and the gig economy picking up steam every day, firm leaders now have the ability to accommodate alternative work arrangements to retain their best and brightest.	<b>TBD</b> <i>Technical finance topic</i>
<b>Leadership and the Knowing/Doing Gap</b> <i>Jon Lockhorst, Lockhorst Consulting LLC</i> Why do 40% of workers say they have a bad boss? Why do one-third of workers say poor leadership is the most stressful part of their job? The knowing-doing gap is at the root of many of these leadership problems. Leaders know what it takes to be effective but don't put that knowledge into action. This session explores the reasons behind this gap and offers practical steps to break through to become a more effective leader.		

**Both days include continental breakfast, lunch, networking and closing reception. Participants will receive 15 CPE (NASBA Accredited).**