2018 RMAC

Rocky Mountain Area Conference for Finance & Accounting Professionals

Thursday – September 27 & Friday – September 28

Arvada Center
6901 Wadsworth Boulevard
Arvada, Colorado 80003

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Keynote Speakers

- **Robin Szeliga, CPC, PCC, ELI-MP**
  Values: The Guideposts to Success
- **Andrew Johnston**
  The Best BUSINESS Education? Run a Marathon!
- **David Seserman, JD**
  Personal Electronic Devices in the Workplace – Should Management Be Concerned?
- **Anna Conrad, JD**
  How to Deal With a Toxic Manager – and How Not to Become One!

Corporate Sponsors

CPE credits are based on a 50-minute hour. Participants must remain in a particular session for at least 50 minutes to earn a minimum of 1 CPE credit. Under current Colorado State Board of Accountancy guidelines, all active Colorado licensees must complete four hours of ethics courses which may include two hours of Colorado Rules & Regulations in every two year reporting period, to maintain their license in an active status. All attempts have been made to ensure that these classes qualify for CPE credit under the rules of the Colorado State Board of Accountancy. Attendees have the responsibility to ensure that the classes they attend conform to the CPE credit guidelines and policies of the association managing their certification or the state issuing their license.

Keynote Speakers

Robin Szeliga, CPC, PCC, ELI-MP, *Right Action Consulting*

Values: The Guideposts to Success

As CEO of Right Action Consulting, Robin is a leadership coach with 25+ years business experience as a CFO/COO which gives her unique insight to real world leadership and business challenges. Robin is passionate about helping leaders gain clarity of purpose, articulate strategy, develop people, and get results. She conducts leadership and team workshops and is a sought after, dynamic, public speaker. Her presentations are described as energizing, thought-provoking and candid. Robin is a professionally certified coach. She is certified in Energy Leadership™ management theories of organizational behavior. See additional certifications and information at www.rightactionconsulting.com.

Andrew Johnston, *The Athlete Professor*

The Best BUSINESS Education? Run a Marathon!

Andrew is an Executive Coach, former Business Professor and former Executive Career Consultant for a global career transition consulting firm. His background in business, athletics, and academia enable him to bring a unique and personal perspective to classroom and corporate audiences. Andrew developed a business course titled "Change through Challenge." The premise of the course: the life skills to succeed in business and in life, can be acquired and mastered through the transformative power of distance training. The final exam … a 26.2-mile marathon! This course has been featured in his TEDx Talk, The Denver Business Journal, The Denver Post and Runner's World Magazine.

David Seserman, JD, *Seserman Law LLC*

Personal Electronic Devices in the Workplace – Should Management Be Concerned?

With more than three decades of experience, David is one of Colorado's foremost civil trial attorneys. As the founding member of Seserman Law LLC, David works with businesses and business people as a trusted advocate and ally. He is a trained mediator who collaborates with professionals and companies in a variety of industries including finance and accounting, real estate, and technology and is often hired to resolve the legal issues they face related to human resources. David is known as one of the go-to legal practitioners for law firm dissolution in Denver and has served as the liquidator of the two largest law firm dissolutions in Colorado history. He lectures to business professionals and other lawyers on a variety of topics and is the co-chair of the litigation committee of the GPSolo Division of the American Bar Association. David earned his JD from the University of Denver and his BS in Business Administration from Washington University/St. Louis.

Anna Conrad, JD, *Impact Leadership Solutions*

How to Deal With a Toxic Manager – and How Not to Become One!

Anna Conrad, JD is founder of Impact Leadership Solutions, a Denver based leadership development and consulting firm founded in 2007. She has coached and trained thousands of people in over 200 countries consistently garnering the highest ratings from her numerous clients, including Western Union, Crocs, CBRE, Comcast, Level 3, DigitalGlobe, CoBank, and dozens more. Since 2010, Anna has served as faculty to the State of Colorado Judicial Education Department, training all newly appointed judges on leadership and communication skills. She has been a sought after expert on over 300 radio shows throughout the United States, and has been featured in many major publications, including Fast Company, Inc., Chicago Tribune, and 43 Business Journals as "an articulate expert who serves as a great resource for executive business-management topics". Anna is also the author of bestseller "(R)evolution: One Man's Leadership Journey".

2018 RMAC Conference Schedule

Accounting/Auditing Course Descriptions

Accounting Standards Update
Steve Van Meter, CPA
CliftonLarsonAllen LLP

This session will provide an overview of Accounting Standards Updates (ASUs) issued since 2017 and their impact on financial reporting, focusing on ASUs issued in 2017/2018 and certain updates issued in prior years which take effect in 2018. Learn what's in the pipeline regarding proposed standards to identify issues that may impact your business and clients. Discussion will also highlight any new activities of the Private Company Council (PCC) including ASUs that have been issued specifically for private companies. Learning objectives include understanding recently issued ASUs and how they impact financial reporting, reviewing the activities of the FASB's PCC, and learning about what's on the horizon. This course is designed for accountants in both public and private practice who are responsible for making certain financial statements are prepared in conformity with US GAAP. This includes auditors as well as internal accountants who are part of the financial reporting process.

Revenue Recognition
Rob MaCoy, CPA
BKD LLP

This discussion will focus on a practical approach to the adoption of ASC 606 by identifying common specific difference from current GAAP. The presentation will walk through the 5-step process under ASC 606 and address some common questions. The objective will be providing the knowledge to help implement the new revenue standard in a practical manner.

Own Your Analytics – What Problems Are Hiding in Your Data?
Sarita Crowley, CPA
CBIZ Risk & Advisory Services

This is a participatory presentation with interactive polls and questions. Participants will first obtain a knowledge of Big Data and practical uses and benefits of data analytics. Next, participants will understand where and how data is collected. This leads participants into an appreciation for the natural shortcomings of data collection and why owning your data will lead to achieving the benefits of data analytics. The final objective provides participants with solutions to resolve their data issues.

Innovating Internal Audit
Brent Hutchings, CISA
Arrow Electronics

This presentation will discuss the strategic imperative to innovate internal audit processes – at least at the same pace as the business innovates. We will discuss our successes and use case study for adopting innovation including: Adopting Agile principles in audit projects and risk assessments; Using virtual reality in inventory observations to reduce travel costs and as potential leverage by external auditors; Using robotic process automation and determining which processes would be candidates for automating; Using natural language processing (speech-to-text) technology to document workpapers.

3 Pragmatic Techniques for Root Cause Analysis
Raven Catlin
CPA, CIA, CFSA, CRMA
Raven Global Training

Do you have 3 months to complete a thorough, deep-dive on your problems to apply the 18 different root cause analysis techniques? No?!? Well, neither do we. Raven will help you apply the 3 techniques that streamline the root cause analysis process and make the best use of your team's time in the most pragmatic way. In this session, you will receive templates to use as your team analyzes complex problems and hands-on practice with each of the 3 techniques to address problems encountered in your professional field. Whether you are in Information Technology, Tax, Accounting, or Internal Auditing, you will walk away from this session with the tools to help you identify the real root cause and you may even develop solutions to your most frequent problem or challenge.

Regulatory Update
Jake Vossen, CPA
& John Monahan, CPA
Moss Adams LLP

This presentation will provide an update on all regulatory items that are needed to serve best practices. As a member of the Center for Audit Quality's SEC regulations committee, Jake Vossen will present an update on the new SEC commissioners, new PCAOB board members, and recent developments in the regulatory regime. The presentation will also include our experienced tax partner, John Monahan, presenting on the recent tax reform changes impacting businesses under the recently enacted Tax Cuts and Jobs Act of 2017.

Photo Credit: Wes Magyar

2018 RMAC Conference Schedule
Thursday, September 27, 2018

Time	Accounting/Auditing	Management/Leadership	Taxation	Special Topics
7:00am - 7:30am	Registration and Continental Breakfast • Sponsored by Robert Half			
7:30am - 7:40am	Welcome and Opening Remarks			
7:40am - 8:30am	**Morning Keynote Speaker – Robin Szeliga, CPC, PCC, ELI-MP, Right Action Consulting** *Values: The Guideposts to Success* FOS - Behavioral Ethics (*B)			
8:45am - 10:25am	**Accounting Standards Update** Steve Van Meter, CPA CliftonLarsonAllen LLP FOS - Accounting (*I)	**Work Happy: The Secrets of the Happiest Companies & Employees** Karen Policastro & Tammy Lopez Robert Half FOS - Personnel/HR (*B)	**Implications of Tax Reform for Nonprofits** Kim Hunwardsen, CPA Eide Bailly LLP FOS - Tax (*I)	**Fraud – Insiders, Outsiders & Cyber** Robert Rudloff CISSP-ISSMP, PMP, CPA, CFE & Stephanie Drew, CPA, CFE RubinBrown LLP FOS - IT/Fraud (*B)
10:40am - 12:20pm	**3 Pragmatic Techniques for Root Cause Analysis** Raven Catlin, CPA, CIA, CFSA, CRMA Raven Global Training FOS - Auditing (*I)	**Building an Emotionally Intelligent Team** Robin Szeliga, CPC, PCC, ELI-MP Right Action Consulting FOS - Pers Development (*B)	**Tax Reform Update – Federal & State Implications** Dustin Hubbard, CPA & Matthew Baldwin, CPA CliftonLarsonAllen LLP FOS - Tax (*I)	**Auditing Without a Rudder: What the Fraud is Wrong With You?** Johnnie Ray Bejarano DBA, CPA, CFE, CGMA, CGFM Regis University FOS - Auditing/Fraud (*I)
12:20pm - 12:50pm	Vendor Visitation			
12:50pm - 1:20pm	Lunch			
1:20pm - 2:20pm	**Afternoon Keynote Speaker – Andrew Johnston, The Athlete Professor** *The Best BUSINESS Education? Run a Marathon!* FOS - Pers Development (*B)			
2:20pm - 2:50pm	Vendor Visitation			
2:50pm - 4:30pm	**Revenue Recognition** Rob MaCoy, CPA BKD LLP FOS - Accounting (*I)	**Vendor Risk Management – It Takes a Village** Kate Ives, CIA, CFE, JD OFI Global Asset Management FOS - Mgmt Services (*B)	**How to Avoid Ethical Catastrophes: Is it Possible? (CQE)** Johnnie Ray Bejarano DBA, CPA, CFE, CGMA, CGFM Regis University FOS - Ethics (*B)	**Incapacity Planning – Helping Clients & Their Families Before a Crisis** Janine Guillen, JD, RN & Jerry Borison, JD Anderson & Jahde PC FOS - Spec Knowledge/Pers Fin Plan (*B)

***NASBA Experience Ranking Code: *B = Basic *I = Intermediate *A = Advanced • No prerequisites or advance preparation required**

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2018 RMAC Conference Schedule

Friday, September 28, 2018

Time	Accounting/Auditing	Management/Leadership	Taxation	Special Topics
7:00am - 7:30am	Registration and Continental Breakfast • Moss Adams LLP			
7:30am - 7:40am	Welcome and Opening Remarks			
7:40am - 8:30am	Morning Keynote Speaker – David Seserman, JD, Seserman Law LLC *Personal Electronic Devices in the Workplace – Should Management Be Concerned?* FOS - Business Law (*B)			
8:45am - 10:25am	Regulatory Update Jake Vossen, CPA & John Monahan, CPA Moss Adams LLP FOS - Accounting (*I)	Are You Running Your Business or is Your Business Running You? Anastasia Toomey Meritage Strategy Group FOS - Mgmt Services (*I)	2018 New Tax Law & How it Affects Individual Tax Returns Victoria Marschner, CPA Victoria Marschner CPA LLC FOS - Tax (*I)	An Introduction to Blockchain, Crypto Currencies & Smart Contracts Kristine Brands, CMA Regis University FOS - Finance (*B)
10:40am - 12:20pm	Own Your Analytics – What Problems Are Hiding in Your Data? Sarita Crowley, CPA CBIZ Risk & Advisory Services FOS - Auditing (*I)	Managing Millennials – Leading Practice & Common Challenges Scott Peyton, CPA, CGEIT PwC FOS - Personnel/HR (*B)	Duct Tape Nexus – Where We Stand Following Wayfair Dustin Hubbard, CPA CliftonLarsonAllen LLP FOS - Tax (*I)	Crypto Currencies: Wave of the Future or Black Hole of Fraud? Rand Gambrell, CPA, ABV, CFE, CFF, CVA BKD LLP FOS - Finance (*B)
12:20pm - 12:50pm	Vendor Visitation			
12:50pm - 1:20pm	Lunch			
1:20pm - 2:20pm	Afternoon Keynote Speaker – Anna Conrad, JD, Impact Leadership Solutions *How to Deal with a Toxic Manager – and How Not to Become One!* FOS - Pers Development (*I)			
2:20pm - 2:50pm	Vendor Visitation			
2:50pm - 4:30pm	Innovating Internal Audit Brent Hutchings, CISA Arrow Electronics FOS - Auditing (*I)	Ethical Implications of Recent Supreme Court & Regulatory Decisions (CQE) Kevin O'Brien, CPA, JD University of Denver FOS - Ethics (*B)	When Should Your Clients Start Receiving Social Security Benefits? Eric Johnson, CNSSA PBS Wealth Management Consultants FOS - Tax (*B)	Disruptive Technologies: How to Reign in Their Risks Josh Haxel, CPA & Cody Hagans, CIA, CISA, CFSA Ernst & Young LLP FOS - IT/Audit (*I)

***NASBA Experience Ranking Code: *B = Basic *I = Intermediate *A = Advanced • No prerequisites or advance preparation required**

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Implications of Tax Reform for Nonprofits
Kim Hunwardsen, CPA
Eide Bailly LLP

The most significant piece of tax legislation in over 30 years was recently signed into law. All individual and organizations will be impacted by tax reform in some way. Several key components of tax reform will have an impact on tax exempt organizations, either directly, or indirectly. It is now important for tax exempt organizations to understand how they will be affected moving forward and what actions should be taken to strategically plan for and adapt to the changes. Discussion will provide an understanding of the key components of tax reform impacting nonprofit organizations, nonprofit organizations consideration of actions to address the tax reform changes, and development of strategies to prepare for other IRS activities.

2018 New Tax Law & How it Affects Individual Tax Returns
Victoria Marschner, CPA
Victoria Marschner CPA LLC

This session will provide: An understanding of the law and planning strategies for the 20% qualified business income deduction for Schedules C, F & E; How the new law changes AMT; How to work with the new law for operating losses; How to identify the changes to depreciation deductions, including Sec 179 and bonus depreciation. Discussion will also include individual tax planning topics, updates on cases, and other changes.

Tax Reform Update – Federal & State Implications
Dustin Hubbard, CPA & Matthew Baldwin, CPA
CliftonLarsonAllen LLP

This session will provide a business overview of federal income tax reform implemented in December 2017, the Tax Cuts and Jobs Act of 2017, as well as the changes and corrections implemented since its passing. This tax bill was the largest tax bill passed in the last 30 years with far reaching impacts to companies and individuals alike. As time passes, more nuances and opportunities are being discussed within the accounting community. Areas of focus will include the federal and state implications of the 20% pass-thru income deduction (Section 199A), 100% asset expensing via bonus depreciation, tax rate changes, business interest deduction limitations, and accounting methods (cash vs accrual). Discussions will hit each of these areas of interest and the opportunities/discussions that you should be having with your clients or within your company. Learn about the major provisions of the law impacting your business and business clients from a federal and state tax stand point.

When Should Your Clients Start Receiving Social Security Benefits?
Eric Johnson, CNSSA
PBS Wealth Management Consultants

Many clients may assume they have to begin receiving Social Security benefits as soon as they retire and stop working. But that is not always the case. There are many considerations that go into claiming Social Security benefits, and there is no one-size-fits-all answer. It is a complex decision that must be made based on an individual's unique circumstances which include their current and future income needs, their retirement time horizon, their spouse's benefits, and various tax implications. At this workshop, discussion will include: What full retirement age is and how benefits are calculated; How retiring earlier (or later) than retirement age affects benefits; How working after receiving retirement benefits affects what is received; The challenges facing the lower-earning spouse when it comes to their retirement benefits.

Duct Tape Nexus – Where We Stand Following Wayfair
Dustin Hubbard, CPA
CliftonLarsonAllen LLP

The US Supreme Court issued a major tax decision in June which impacts tax nexus throughout the United States. Even with this decision, many questions will remain for sales tax and income tax nexus, and they all appear to be duct-taped together and barely functional. Will we continue to see states enact stiff remote seller reporting requirements? What about economic nexus for income taxes? Will Streamlined Sales Tax Project ever get off the ground? This session will provide an overview from where we started and explore lurking dangers of the future and how you can plan and be prepared for these "sticky" times.

Photo Credit: Wes Magyar

2018 RMAC Conference Schedule

Management/Leadership Course Descriptions

Values: The Guideposts to Success

Robin Szeliga, CPC, PCC, ELI-MP

Right Action Consulting

This course will differentiate between business ethics/standards and personal values. The keynote format will be interlaced with opportunities for participants to identify and define their personal values as well as past professional experiences which have challenged them in the application of those values. The keynote addresses the heavy toll of stress on decision-making, the critical need for self and other awareness in successfully managing the application of professional ethics and personal values during times of duress and uncertainty. Robin uses her life changing professional experience and stories to bring home the concepts of this keynote.

Work Happy: The Secrets of the Happiest Companies & Employees

Karen Policastro & Tammy Lopez

Robert Half

Happy employees are better employees. But many workers say they are not happy. In fact, one-third of employees admit they are thinking about leaving their jobs in the next six months. Robert Half surveyed more than 12,000 workers in North America about their jobs and what they love the most. The research helps connect the dots between the happiness and health of employees and how their well-being can benefit a firm's bottom line. This presentation highlights the survey findings and offers strategies to help companies cultivate a happier workplace to attract and retain personnel.

Vendor Risk Management – It Takes a Village

Kate Ives, CIA, CFE, JD

OFI Global Asset Management

This will be a panel discussion to explore what good vendor oversight looks like in today's world. With the ever increasing reliance on vendors, it is critical to ensure companies have good vendor oversight. Technology advances have helped streamline vendor oversight, but at the same time, technology advances have blurred the lines between companies and vendors. This session will explore what internal auditors should look for in evaluating vendor oversight including data security, cloud concerns, 4th party vendors, etc.

The Best BUSINESS Education? Run a Marathon!

Andrew Johnston

The Athlete Professor

Former business professor, executive coach and ultramarathon runner, Andrew will demonstrate how the principles of developing grit and determination for a 26.2-mile marathon apply in the classroom, the boardroom and in LIFE – even if you never run a mile in your life! Three principles discussed relating marathon training to life include knowing your "why", the power of consistency, and how to be an influence.

Managing Millennials: Leading Practice & Common Challenges

Scott Peyton, CPA, CGEIT

PwC

Join an interactive discussion on leading practice and common challenges for managing and learning from Millennials. This generation represents a significant force of our audit, risk, and compliance teams but are subject to misguided perspectives on their motivations and expectations. Hearing directly from high performing Millennials, you will be provided unique transparency and potentially new understanding on integrating the Millennial generation.

Personal Electronic Devices in the Workplace – Should Management Be Concerned?

David Seserman, JD

Seserman Law LLC

In 2018, almost all employees use electronic devices in the workplace. Some companies have adopted BYOD (bring your own device) policies, others prohibit the use of personal devices for business. What happens when there is a data breach? Who is responsible? If an employer promotes BYOD, can the employer access data on the personal device? Is it fair for a company to remotely wipe data from a former employee's personal phone? What about cloud storage, is it secure? Can an employee's contact list be considered a company trade secret? How does remote working impact these issues? If an hourly employee checks business emails while watching her daughter's soccer game, does the company have to pay her for time spent multi-tasking? Attendees will have an opportunity to discuss and address these and other issues during an interactive presentation.

Building an Emotionally Intelligent Team

Robin Szeliga, CPC, PCC, ELI-MP

Right Action Consulting

This course will give a broad overview of emotional intelligence and outline the compelling case for developing an emotionally intelligent team. The workshop format will use audience polling to bring insight to the problems faced by leaders and teams in today's fast-paced, stress-laced environment. The use of an emotional intelligence toolkit by teams to effectively address the workplace challenges and better understand the team dynamics will be explored. This insightful exploration will be captured using mind mapping. Each participant will identify the central issues faced by their team and then explore the use of social and emotional intelligence to address the issues and create solutions.

Are You Running Your Business or is Your Business Running You?

Anastasia Toomey

Meritage Strategy Group

The Entrepreneurial Operating System was created by Gino Wickman and documented in his best-selling book, "Traction". EOS provides a complete system with simple tools to help companies achieve three things: Vision, Traction and Organizational Health. Are your leaders 100% on the same page regarding where your organization is going and how it is going to get there? Are your leaders disciplined and accountable? Do they execute well? Are your leaders a healthy, functional, cohesive leadership team? The result of implementing EOS is the creation of a clear vison, with the traction to lead to a healthy organization that will help you get what you want from your business. Learn tools you can take back to your business immediately to help you and your company get where you want to go!

How to Deal with a Toxic Manager – and How Not to Become One!

Anna Conrad, JD

Impact Leadership Solutions

A lot has been written about the need for leaders with humility, openness and a servant leadership mindset. But the truth is, it is often the psychopaths, the narcissists, the bullies, and the autocrats that are hired and promoted. How do you work with these self-serving managers, and (more importantly) how can you not become one? Learn how to identify the types of toxic managers, learn strategies to handle each type of toxic manager, and determine your own possible blind spots.

Ethical Implications of Recent Supreme Court & Regulatory Decisions (CQE)

Kevin O'Brien, CPA, JD
University of Denver

This session will bring current changes and impact on the CPA profession regarding ethical implications of recent Supreme Court decisions, Regulatory decisions, criminal indictments and other relevant events. Discussions will include: The Supreme Court in Salman with tipper/tippee liability for CPAs; The Supreme Court in Somers with CPA employment protection for whistle blowing GAAP violations internally; The Justice Department with criminal indictments against KPMG partners, the organizational sentencing guidelines and the prisoner dilemma; The discipline of E&Y and partners by the SEC for violations of inappropriate relationships; The Wells Fargo professional ethical issues related to government fines over $1B.

How to Avoid Ethical Catastrophes: Is It Possible? (CQE)

Johnnie Ray Bejarano
DBA, CPA, CFE, CGMA, CGFM
Regis University

Using a foundation of ethics and compliance programs, there are still cases of ethical people making unethical choices. Pressure to perform and goals to meet unrealistic targets might lead to ethical catastrophes. Accounting and financial professionals need better awareness of how perpetrators of fraud are not hardened criminals. Learn how to: Understand the latest fraud research findings from the ACFE 2018 Report to the Nations; Create an awareness of how ethical people can make unethical decisions; Evaluate pressure to perform and develop a plan that promotes open, honest dialog.

Fraud – Insiders, Outsiders & Cyber

Robert Rudloff, CISSP–ISSMP, PMP, CPA, CME
& Stephanie Drew, CPA, CFE
RubinBrown LLP

Fraud is affecting organizations and individuals at an alarming rate. Cyber threats from outside your walls, employees on the inside, and a range of criminals present challenges that require diligence and expertise which are becoming more complex and difficult to manage. This session will explore threats, trends in fraud activity, and key risk reduction efforts to assist management. The presenters provide a mix of fraud and cyber expertise to provide different perspectives, insight, and detailed feedback for attendees. Learning objectives include: Understand the fraud threats in today's environment; Learn the key steps to take to educate employees on cyber threats; Provide update on key statistics on organization's exposures to internal fraud and abuse; Provide information related to navigating the fraud landscape and interpreting guidance related to key internal controls.

Crypto Currencies: Wave of the Future or Black Hole of Fraud?

Rand Gambrell
CPA, ABV, CFE, CFF, CVA
BKD LLP

This presentation will discuss the basics of crypto currencies and blockchain technology. It will then discuss how companies and industries are using crypto currencies in their business and unique risks that result from the use of these "modern" currencies. Finally, we will discuss recent examples of fraud involving crypto currencies and blockchain technology.

An Introduction to Blockchain, Crypto Currencies & Smart Contracts

Kristine Brands, CMA
Regis University

Blockchain, crypto currencies, and smart contracts are emerging technologies that are having an impact on the accounting and finance profession and are positioned to revolutionize how we do business, share information, and create value. This session will provide a basic overview to explain what they are, how they work, and their pros and cons in today's business environment. At the end of this session, participants will be able to: Define blockchain, crypto currencies, and smart contracts; Explain how the technologies work; Explain current applications in accounting, finance, treasury, and foreign exchange.

Disruptive Technologies: How to Reign in Their Risks

Josh Haxel, CPA
& Cody Hagans, CIA, CISA, CFSA
Ernst & Young LLP

Disruptive technologies could be defined as "one that purposefully displaces an established technology and alters an industry or way of doing business–including jobs–or a ground-breaking product that creates a completely new industry." For some companies with foresight, a focus on the risks will enhance the opportunities. But for those with the blinders on, such risks will ultimately bring financial difficulties. This session will share insights around disruptive technologies and digital risk, how internal audit can adapt to the transformative age, and key considerations for your internal audit plan.

Auditing Without a Rudder: What the Fraud is Wrong With You?

Johnnie Ray Bejarano
DBA, CPA, CFE, CGMA, CGFM
Regis University

Using a case study approach, this session will introduce current research findings which improve fraud audits. Participants will learn from actual prior fraud cases and receive updated information from the ACFE 2018 Report to the Nations. Objectives include: To understand the latest fraud research findings from the ACFE 2018 Report to the Nations; To create an awareness of the most effective fraud detection techniques; To apply fraud theory to actual case studies.

Incapacity Planning – Helping Clients & Their Families Before a Crisis

Janine Guillen, JD, RN
& Jerry Borison, JD
Anderson & Jahde, PC

This session works through the major components of a comprehensive Incapacity Plan. Objectives include: Explain what risks exist in an estate plan with little or no incapacity planning; Compare and contrast specific planning tools, including disability triggers; Differentiate from legal preplanning vs. legal crisis planning.

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