



The Association of
Accountants and
Financial Professionals
in Business

CATAWBA VALLEY CHAPTER

6th Annual Asheville Accounting and Management Conference

Friday, March 22, 2019

8:00 am – 5:00 pm

Hilton Asheville Biltmore Park
43 Town Square Boulevard
Asheville, NC 28803
828-209-2700

BOOK A GROUP RATE ROOM AT THE HILTON March 21, 2019 - March 24, 2019

[Hilton Asheville Biltmore Park Group Rate Reservations](#)

Sponsored by: Catawba Valley Chapter IMA

8 Continuing Professional Education Credits
(Including 4 Hours of qualifying Behavioral Ethics)

Conference Location Directions:

From South: Follow I-26 West to Exit 37, Long Shoals Road. Exit right and take a left at first light on Schenck Parkway. At first intersection, turn left onto Thetford Street. Travel ¼ mile and our hotel will be on your right.

From North: Take I-26 East to Exit 37, Long Shoals Road. Exit left and take a left at first light on Schenck Parkway. At first intersection, turn left onto Thetford Street. Travel ¼ mile and our hotel will be on your right.

Conference Registration Information:

Registration check-in begins at 8:00 a.m. and the first seminar begins at 8:30 a.m. The last session will end just before 5:00 p.m. *Course fees are payable in advance.*

All reservations must be received by Wednesday, March 20, 2019 by registering:

- ONLINE @: [CVC IMA Asheville Conference Registration](#)
- VIA EMAIL: by emailing catawbavalleyima@gmail.com
- VIA MAIL: IMA Catawba Valley
P.O. Box 2132
Hickory, NC 28603

Registration fees include continental breakfast, refreshment breaks, lunch, and course materials.

***Registration will be available at the door provided space is available and lunch may not be included.*

Prerequisites: None

Advance Preparation: None

Program Level: Basic

Delivery Method: Group-live

CPE Information

The Catawba Valley IMA is registered with the National Association of State Boards of Accountancy (NASBA), as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors via its

website: WWW.nasbaregistry.ORG.

This program meets the ICMA guidelines for CPE credits for CMAs and CFMs.



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*****Registration/Coffee/Continental Breakfast*****

8:00 am -8:30 am

Morning Session 8:30 am-10:10 am

(CPE Credit: 2 Hours in Specialized Knowledge)

Martin Brossman Presents:

“Artificial Intelligence and Your Future”

Machine Learning is infusing into all aspects of our lives as it builds toward Artificial Intelligence. This presentation gives a basic understanding of how it is affecting our culture, critical knowledge for businesses, students, sales representatives and professionals.

"There has never been any other time in life when so many aspects of our world are focused on advancing artificial intelligence (AI) and machine learning as today," Martin Brossman said. "I believe students and professionals need a basic understanding of how Machine Learning and AI are progressing today because its influence on our life is growing rapidly. As our world gets more automated and AI gains greater dominance in our society, working on enhancing our best human qualities will give us a competitive advantage."

Enjoy this basic overview of how we are advancing into this “brave new world”, where we will have to educate a society of thinkers, reexamine our purpose and redefine societal consciousness.

- Understanding how AI and Machine Learning is already infused into our world
- Identifying the possible jobs that it will create and jobs that will be going away
- Defining key terminology you need to know in regards to AI and Machine Learning
- Being able to see through the hype of marketing today to understand where we are today
- Recognizing what you need to know for your career about AI and Machine Learning

Morning Session 10:25 am-12:05pm

(CPE Credit: 2 Hours in Behavioral Ethics)

Dr. Rebecca Heiss Presents:

“Blind Spots to Break Throughs”

Everyone has blind spots. The difference between a break down and a breakthrough is your willingness to check them.

We've all been there. Speeding along in our car, mind set on the destination when... BOOM! That vehicle in the other lane came out of nowhere! Blind spots in the workplace can prove just as disastrous. Without checking our ethical blind spots, we are destined to let our subconscious do the driving, impacting our choices and interactions in ways we never anticipated or intended. Take back the wheel.

As an expert in human behavior and evolutionary psychology, Dr. Rebecca Heiss takes clients on an insightful journey into their own minds exploring how subconscious blind spots act as barriers to optimal individual and team performance. Through her vulnerable and humorous re-telling of how she reconciled a major personal blind spot (or two), Rebecca empowers participants to overcome behaviors that lead to breakdown and provides tools to breakthrough to be the powerful, self-aware leaders their teams need. Move out of survive and into thrive!

- Understand of the root of subconscious behaviors
- Neutralize their fears associated with blind spots through self-awareness
- Recognize implicit bias on a personal and organizational scale
- Learn how reliance on the subconscious can lead to ineffective and/or unethical decision making
- Establish a road map to keep blind spots in check and consciously tell their own stories

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*****Lunch 12:05 pm – 1:00 pm*****

Afternoon Session 1:00 pm – 2:40 pm

(CPE Credit: 2 Hours in Behavioral Ethics)

Joe Lakatos Presents:

"Counteractive Control Training - the Missing Link in Fraud Prevention and Ethics Programs"

This presentation explores practical applications of ethical orientations in business ethics programs. While most business ethics programs are oriented toward the risk that fraud may not be prevented and detected, other ethical orientations are often under emphasized. The reason for this is that most research has focused on the ethical practices comprising a minimally effective ethics program as defined by federal compliance guidelines. We provide evidence that most business ethics programs under emphasize the latent risk of rationalization in the workforce. Despite the use of ethical practices such as pre-employment screenings, ethical violations persist, with over 90% of fraud committed by perpetrators with no prior criminal record. We will demonstrate that businesses should incorporate counteractive control training in their business ethics programs to reduce this risk. We will walk attendees through the nuances of counteractive control training while illustrating its ability to increase the decision maker's resolve to behave ethically when faced with personal or organizational pressure.

- Understand the differences between compliance based and value-based ethics programs and their respective strengths and shortcomings.
- Develop an appreciation of the latent risk of rationalization in the workforce and the role counteractive control training can play in minimizing this risk.
- Explore how counteractive control training should be conducted in an organization.

Afternoon Session 3:00 pm – 4:40 pm

(CPE Credit: 2 Hours in Personal Development)

Dr. Rebecca Heiss Presents:

"#MeToo: The brain science behind our culture of sexual harassment and what we can and must do to change it."

Men may not be from Mars any more than women are from Venus, but there is little doubt our paths on this planet have not always aligned. In fact, the cultural and evolved differences between the male and female brain are staggering and have huge implications for gender-specific leadership.

As an expert in human behavior and evolutionary psychology, Dr. Rebecca Heiss takes clients on an insightful journey into their own minds, exploring how the female and male brains approach risk, challenge, conflict, and cooperation. With her personal accounts of difficult encounters with strangers, colleagues, and supervisors, Rebecca brings a powerful and revealing testimony to help us all better process the challenges men and women face in fighting a malicious and pervasive societal problem. By approaching sexual harassment from a biological perspective, Dr. Heiss reveals the roots of these less than welcome behaviors to help her clients appreciate how to change their own biology for better, and prevent the misinterpretation, miscues, and miscommunications that have overwhelming, detrimental and often irreversible consequences.

- Understand the roots of different gender communication
- Maximize the ability to interpret social cues and acknowledge differences in acceptability
- Empower an appropriate recognition and response to sexual harassment
- Build a powerful and clear vision of how to avoid harassing and being harassed under all circumstances
- Rewire brains and behavior for more positive and less threatening interactions

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Guest Speaker Biographies

Martin Brossman

Martin Brossman is a leading authority on social media and online marketing. He is a business coach, consultant and a dynamic trainer known for his insight and humor. A member of the National Speakers Bureau, Martin is a popular speaker on social media topics and web related topics for business professionals. He teaches at North Carolina community college Small Business Centers throughout the state since 2006. Currently, he teaches a Social Media Management Certificate program at NC State University TTS. His published books include *Social Media for Business*, *Linking Into Sales* (professional use of LinkedIn) and *How to use Hashtags*. He has been self-employed since he left IBM in 1995 and has over 10 years of experience in the business use of Social Media.

Rebecca Heiss, PhD

After earning her PhD with research designated as “transformative” by the National Science Foundation, Dr. Rebecca Heiss went on to hold multiple appointments in academia, applying her research to solve practical problems in overcoming what she refers to as “biological ghosts” - subconscious behaviors that haunt modern life. She founded Biologic Balance, a stress hormone consultation company and is currently launching a new self-awareness app, called *lcueity*, to help every individual reach her/his full potential. She has been honored to speak internationally on her work, including a TEDx, and has found her calling in helping others recognize the power of biological applications in the business world. She currently chairs a private advisory board in Greenville, SC to help business leaders empower one another to live happier, more conscious lives while growing their organizations.

Joseph P. Lakatos

Joseph P. Lakatos, LL.M, JD, MBA, CPA, CFE, is Professor and Chair of the Accounting and Finance Department at the University of North Carolina at Pembroke. He is formerly the *Elingburg* Distinguished Professor of Business Innovation and Director of the Center for Entrepreneurship and Innovation at Western Carolina University. He has more than 28 years of industry experience as an attorney, accountant, fraud examiner, risk manager, and/or business consultant. He teaches courses in International Business Law, Commercial Law, Corporate and International Taxation, Corporate Finance, Estate Planning, Financial and Managerial Accounting, Forensic Accounting, Entrepreneurial Finance & Strategy, Regulatory Environment of Certified Public Accountants, Valuations, and Strategic Management. His teaching methods and style have received the *North Carolina Board of Governors Award for Excellence in Teaching*, *Excellence in Teaching Awards for Inspirational Teaching* at UNCP and WCU, and *Graduate Award for Teaching Excellence* at WCU. Dr. Lakatos' research covers the areas of forensic accounting, corporate governance, entrepreneurship, strategy and innovation, leadership, securities regulation, corporate and international taxation, and corporate social responsibility and ethics. His articles have earned several research awards and have been published in, among others, the *Harvard Business Review*, *CPA Journal*, *China Business Review*, *Current Topics in Management*, and *International Journal of Management Cases*. He serves as an advisor to entrepreneurs, businesses and not-for-profit organizations, providing seminars and consulting services related to risk management, internal controls, fraud detection and prevention, leadership, corporate governance, strategic management & innovation, and valuation. He also serves his community as a little league coach and volunteer for several charities. Dr. Lakatos holds an LL.M from Boston University School of Law, JD from St. John's University School of Law, MBA from St. John's University, and BBA from the University of Notre Dame.

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Take Advantage of our \$100 Registration Fee Refund by Joining the CVC IMA within 30 days of Conference Date! See Website for Details!

Registration Form (Please Print)

**Registration and Payment may be made online via PayPal at <http://catawbavalley.imanet.org/conference.htm> however REGISTRATION FORM must be submitted to Sheronda Fox at catawbavalleyima@gmail.com

Name			
Title			
Company			
Street			
City, State, Zip Code			
Telephone		Email address	
IMA/IIA Chapter		IMA/IIA Member Number (if applicable)	
	IMA/IIA Members	Non-Members	Students
*Full Day	<input type="checkbox"/> \$175	<input type="checkbox"/> \$225	<input type="checkbox"/> \$35
1/2 Day – am	<input type="checkbox"/> \$100	<input type="checkbox"/> \$125	<input type="checkbox"/> \$20
Lunch	<input type="checkbox"/> \$ 25	<input type="checkbox"/> \$ 25	<input type="checkbox"/> \$25
1/2 Day – pm	<input type="checkbox"/> \$100	<input type="checkbox"/> \$125	<input type="checkbox"/> \$20
<u>Please let us know how you heard about our conference:</u>			
<input type="checkbox"/> Email	<input type="checkbox"/> Postcard Mailing	<input type="checkbox"/> Local Ad (Newspaper)	<input type="checkbox"/> Website <input type="checkbox"/> Colleague/Friend
<input type="checkbox"/> Other (Please Specify) _____			

*Full Day registration fees include continental breakfast, refreshment breaks, lunch, and course materials.

Cancellation Policy: Full refunds will be given for all cancellations made at least 24 hours in advance of event date. In case of event cancellation due to inclement weather, catastrophic event, or any other reason, you will be contacted via email. For any cancellation questions or concerns, please email catawbavalleyima@gmail.com

Please contact Ellen Knauf via email at catawbavalleyima@gmail.com with any problems, concerns or complaints about the conference event. You may also mail to the below address to the attention of Ellen Knauf. Conference evaluation forms will be provided the day of the event.

Mail registration with a check enclosed to:

IMA Catawba Valley Chapter

PO Box 2132

Hickory, NC 28603

For Chapter information please visit our website @ <https://catawbavalley.imanet.org/home>