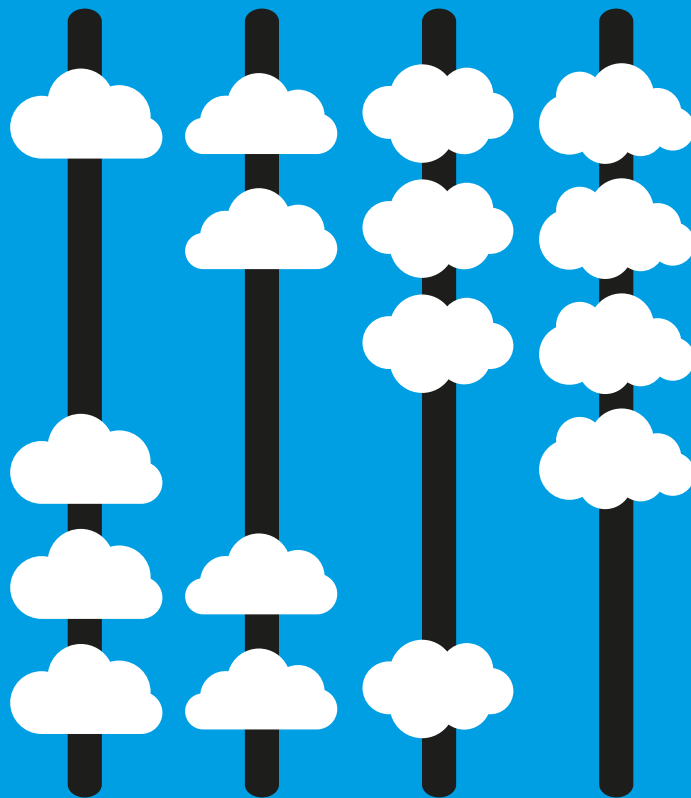


# accounting & FINANCE SHOW

July 11-12 2018, Javits Center, New York, NY



OVER 100  
HOURS OF  
CPE

A MAJOR, FREE, MULTI-STREAM CONFERENCE & EXPO  
ON THE DIGITAL INNOVATION THAT IS SWEEPING  
ACCOUNTING & FINANCE - ARE YOU READY?

Created by

[www.terrapiinn.com/AccountingShowNY](http://www.terrapiinn.com/AccountingShowNY)

SPARK SOMETHING  
**TERRAPINN** 

# OUR STORY

Digital technology is revolutionizing accounting and financial management. Cloud accounting and a plethora of new applications, software and services are giving accountants, bookkeepers and finance managers a powerful range of value-adding tools.

But many accountants are feeling left behind by the pace of change and uncertain about their future in an increasingly automated world. The **Accounting & Finance Show New York** will empower CPAs both new and old to embrace digital transformation, develop new skills and stay ahead of the technology curve.

We're bringing **6** targeted conference streams to an ambitious audience hungry to learn, network and innovate. These streams include:

- Technology
- Tax Management
- Wealth Management
- Practice Management
- Funding, Bookkeeping & Payroll
- Finance Director's Summit

Our **200+ expert speakers** come from every size of accounting practice and every walk of life – from Jamila Abston, Partner at **Ernst & Young** to Jody Padar, author of **The Radical CPA**; and from Kelvin Joseph, CMO of **Steiner Sports** to Ashok Rajan, **Janney Montgomery Scott's** VP of Investments.

If you're looking for networking, discussion, debate and free CPE with thousands of like-minded peers, this is the only New York City event for you.

We can't wait to welcome you to the Javits Center next July!



**AIDAN BRAIN**  
Head of Conference Production  
**Terrapinn USA**

[aidan.brain@terrapinn.com](mailto:aidan.brain@terrapinn.com)



Our keynote speaker **Kelvin Joseph** typifies the ambitious, upwardly mobile CPA experience. After studying public accounting at PACE, Kelvin worked at **Ernst & Young** before becoming **Steiner Sports'** CFO less than a decade after graduating. Now he's COO and CMO of one of America's biggest sports marketing agencies.

# KEY SPEAKERS



## TECHNOLOGY

**Mark Li, Cryptocurrency/Blockchain/Bitcoin Leader, Burr Pilger Mayer**

Leading expert on blockchain, cryptocurrency and all things future-facing



## BOOKKEEPING & PAYROLL

**Stacy Kildal, Founder, Kildal Services**

QuickBooks guru with her own dedicated following across the bookkeeping community



## FINANCE DIRECTORS SUMMIT:

**Jody Padar, Author, *The Radical CPA***

Author, CEO, consultant and renowned visionary



## TAX MANAGEMENT:

**Jamila Abston, Partner, Ernst & Young**

Manager before the age of 27 and partner by the age of 35



## WEALTH MANAGEMENT:

**Ashok Rajan, V.P. Investments, Janney Montgomery Scott**

28-year Wall Street practitioner frequently invited on Bloomberg, CNBC and CNN



## PRACTICE MANAGEMENT:

**Drew Carrick, Senior Consultant, Grant Thornton**

Consultant and entertainment personality – an accountant who raps!

# 200+ SPEAKERS INCLUDING:

## KEYNOTES



**Kelvin Joseph**  
CMO & COO  
Steiner Sports



**Caroline Ciruolo**  
Former Acting  
Assistant Attorney  
General, Tax  
Division  
U.S. Department of  
Justice

## TECHNOLOGY THEATER



**Mark Li**  
Cryptocurrency/  
Blockchain/Bitcoin  
Leader  
Burr Pilger Mayer



**Ranica Arrowsmith**  
Technology Editor  
Accounting Today



**Michael Pinna**  
IT Audit Manager  
Buchbinder & Tunick



**Gregory LaFollette**  
Strategic Advisor  
CPA.com



**Sean Stein Smith**  
Assistant Professor  
Lehman College



**Jasminda Brown**  
Senior Manager IT  
Burr Pilger Mayer



**Erik Weinapple**  
Tax Director  
Burr Pilger Mayer



**Byron Patrick**  
Managing Director  
CPA Practice,  
Network Alliance



**Michael Jones**  
SVP Sales &  
Partnerships  
MBS Tax &  
Accounting



**Andrea Parness**  
CPA/Owner  
A. Parness & Co.



**Sanjiv Singh**  
Director, Fintech/  
Blockchain Advisory  
Group  
KPMG



**Elizabeth Adams**  
Digital Strategy  
Leader  
Links Advisory

## FINANCE DIRECTORS SUMMIT



**Jody Padar**  
Author  
The Radical CPA



**Jacquelyn Tracy**  
Founding Partner  
Mandel & Tracy



**Matthew Nissen**  
Finance Director  
Verus Claims Service



**Mark Zabel**  
Data Scientist/  
Statistician  
Verus Claims  
Services



**Richard Brand**  
CFO  
BeyondSpring



**Lindsay Stevenson**  
VP Finance  
1st Financial Bank  
USA



**Jody Grunden**  
Co-Founder & CEO  
Summit CPA Group

## BOOKKEEPING & PAYROLL



**Gail Perry**  
Editor-in-Chief  
CPA Practice Advisor



**Ann Dzurani**  
Professor of  
Analytics &  
Accountancy  
Northern Illinois  
University



**Jennifer Templeman**  
COO  
Jumpstart



**Pete Badas**  
Managing Partner  
Innovative Tax &  
Accounting Group



**Cindy Schroeder**  
Owner  
Bright Bookkeeping



**James Medeiros**  
Principal  
CrossCountry  
Consulting



**Melissa Krumme Hooley**  
Partner, Employee  
Benefits Plan  
Anton Collins  
Mitchell



**Stacy Kildal**  
Founder  
Kildal Services

## WEALTH MANAGEMENT



**John Napolitano**  
CEO  
US Wealth  
Management



**Lester Wigler**  
Financial Advisor/  
Senior Portfolio  
Manager  
Morgan Stanley



**Hank Berkowitz**  
Managing Principal  
HB Publishing



**Alan Kahn**  
President  
AJK Financial Group



**Daniel Mazzola**  
Investment Advisor  
American Portfolios



**Matthew Rappaport**  
Tax Planning and  
Structuring Attorney  
Matthew E.  
Rappaport, Esq



**Gregory Matalon**  
Estate Litigation  
Attorney  
Capell, Barnett,  
Matalon &  
Schoenfeld



**Rona Loshak**  
Founding Partner  
Karp Loshak



**Natalie Karp**  
Founding Partner  
Karp Loshak



**Karly Laughlin**  
Manager Tax, Small  
Business  
Belfint, Lyons &  
Shuman



**Ash Rajan**  
V.P. Investments  
Janney Montgomery  
Scott

[www.terrapiinn.com/  
AccountingShowNY](http://www.terrapiinn.com/AccountingShowNY)

Accounting & Finance Show is all about opportunity.  
Contact Aidan Brain on [aidan.brain@terrapiinn.com](mailto:aidan.brain@terrapiinn.com) and secure your place now.

Accounting & Finance Show is all about opportunity.  
Contact Aidan Brain on [aidan.brain@terrapiinn.com](mailto:aidan.brain@terrapiinn.com) and secure your place now.

# 200+ SPEAKERS INCLUDING:

## TAX MANAGEMENT



**Justin Hopton**  
Senior Tax Associate  
PwC



**Michael Schidlow**  
Head of Financial  
Crime Compliance  
HSBC



**Rich Lanza**  
Director, Data  
Analytics  
Grant Thornton



**Deniz Appelbaum, PhD**  
Professor of  
Accounting  
Montclair State  
University



**Frances McKenna**  
Tax Director  
Marks Paneth



**Alexander Buchholz**  
Senior Audit  
Manager  
Senior Audit  
Manager



**Michael Young**  
Litigation Partner  
Willkie Farr &  
Gallagher



**Mary-Jo Kranacher**  
ACFE Professor of  
Fraud Examination  
CUNY York College



**Salvatore Collemi**  
Partner in Charge  
Professional  
Standards Group  
Marks Paneth



**Daniel Winters**  
International  
& Bitcoin Tax  
Compliance  
Global Tax  
Accountants



**Mark L. Stone**  
CPA MST  
Sales Tax Defense



**Dennis Lormel**  
President  
DML Associates  
Consulting



**Michael Dillon**  
President  
Dillon Tax  
Consulting



**Edward Mendlowitz**  
CPA Partner  
WithumSmith+Brown



**John D'Amico**  
Director  
Marks Paneth



**Brian Gordon**  
Director of State &  
Local Taxes  
Gettry Marcus CPA



**Brad Muniz**  
Partner  
Sobel & Co.



**Ryan Severino**  
Chief Economist  
JLL



**Robert Barnett**  
Tax Partner  
Capell, Barnett,  
Matalon &  
Schoenfeld



**Chris Hitselberger**  
Managing Director  
SourceHov Tax



**Paresh Shah**  
CEO  
PareShah Financial



**Eli Uncyk**  
Partner  
Kamerman, Uncyk,  
Soniker & Klein



**Jennifer Ann Wynne**  
Tax Attorney  
Tenenbaum Law



**Karen Tenenbaum**  
Tax Attorney  
Tenenbaum Law



**Sibi Thomas**  
Partner, Non-Profit,  
Government &  
Healthcare  
Marks Paneth



**Jamila Abston**  
Partner  
Ernst & Young

## PRACTICE MANAGEMENT



**Drew Carrick**  
Senior Consultant  
Grant Thornton



**Gary Boomer**  
CEO  
Boomer Consulting



**Garrett Wagner**  
Business Therapist  
Thaney & Associates



**Joanne L. DelBalso, EA**  
Owner, No Fuss  
Accounting Services &  
Be Socially Awesome



**Bill Carlino**  
Managing Director  
Transition Advisors



**Jeremias Ramos**  
Editor-in-Chief  
The Daily CPA



**Paul Calabrese**  
Senior Manager  
Rubino & Co



**Sandi Leyva**  
President  
Accountants'  
Accelerator



**Melisa Galasso**  
Owner  
Galasso Learning  
Solutions



**Glenn Eyrych**  
Partner  
Calibre CPA Group



**Jennifer Katrulya**  
Practice Leader  
Entrepreneurial  
Services  
MarksNelson



**Cheryl Goldenberg**  
Mergers & Acquisitions  
Specialty Consultant  
Goldberg  
Consulting Group



**Katie Tolin**  
Chief Growth Guide  
CPA Growth Guides



**Lauren Clemmer**  
Executive Director  
Association  
for Accounting  
Marketing



**Abby Eisenkraft**  
CEO  
Choice Tax Solutions



**Rebekah Brown**  
Manager  
Maryland  
Association of CPAs



**Richard Kestenbaum**  
Partner  
Triangle Capital



**Bob Goldfarb**  
Principal  
Janover LLC



**Andrea Feinberg**  
President  
Coaching Insights



**Ronald Weiner**  
Chairman &  
President  
Perelson Weiner



**Nkrumah Pierre**  
Director, Business  
Development &  
Friends of the Firm  
Program  
EisnerAmper



[www.terrapiinn.com/AccountingShowNY](http://www.terrapiinn.com/AccountingShowNY)

Accounting & Finance Show is all about opportunity.  
Contact Aidan Brain on [aidan.brain@terrapiinn.com](mailto:aidan.brain@terrapiinn.com) and secure your place now.







Accounting & Finance Show is all about opportunity.  
Contact Aidan Brain on [aidan.brain@terrapiinn.com](mailto:aidan.brain@terrapiinn.com) and secure your place now.

# AGENDA AT A GLANCE

# DAY 1

Conference Day One – Wednesday July 11th

## PLENARY KEYNOTES

8:00	Plenary Keynote Conversation: Automation, Hope and Fear: Seizing the Future for the Modern Accountant					
8:25	Plenary Keynote Address: From CPA to CEO: the new wave of entrepreneurial accountants					
8:50	<i>Title Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
	 <b>TECHNOLOGY THEATER</b>	 <b>BOOKKEEPING AND PAYROLL THEATER</b>	 <b>FINANCE DIRECTOR'S SUMMIT</b>	 <b>TAX MANAGEMENT THEATER</b>	 <b>WEALTH MANAGEMENT THEATER</b>	 <b>PRACTICE MANAGEMENT THEATER</b>
9:40	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
10:05	Automated accounting for 21st century business	How to add payroll to your CPA services	The CFO of the future: beyond the numbers	Regulatory roadblocks: equip your clients for change	Title	Principles of change management in accounting firms
10:30	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
10:55	Developing a digital strategy for success available	Navigating the minefield of payroll compliance	Driving business value as a finance director	Data and analytics in tax: the young professional's perspective	Becoming the 'trusted advisor'	Thinking like a start-up
11:20	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
11:45	PANEL: Women in accounting	The Radical HR Manager	Mapping the ideal CFO career trajectory	How tech can transform auditing	Asset management for accounting	Variables for valuing an accounting firm
12:10	TECHNOLOGY INNOVATION SHOWCASE <i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
12:35		Employee education: transmitting value	The Radical CFO	Analysis of tax changes to the ACA	Get ready for the new era in estate planning	The Anticipatory CPA: from crisis manager to opportunity manager
1:00	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
1:25		Payroll software: compare and contrast	Winning new business: tried-and-tested techniques	Thinking strategically with cost segregation	Radical Wealth Management	PANEL: Recruiting & retaining millennials
1:50	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
2:15	PANEL: Blockchain for accounting: the next agitator of change?	Working smart: how tech can revolutionize your day-to-day	Being a virtual CFO: is it possible? Is it desirable	Internal auditing: developing a workforce strategy for improved risk management	Robo-advisors: the future of wealth management?	PANEL: Marketing strategies for large practices
2:40	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
3:05	PANEL: Crypto-accounting in the business world	Effective time management for CPAs	Document management for small business	Accounting and auditing for non-profits	Marketing wealth management	Brand yourself: carving out a social media niche
3:30	<i>Platinum Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
4:20	Time to get radical: upending the traditional CPA model					
4:45	CEO Q&A: Leadership in accounting & technology – managing firms through disruption and innovation					
5:10	Networking Drinks Cocktail Party					







END OF CONFERENCE DAY ONE

# AGENDA AT A GLANCE

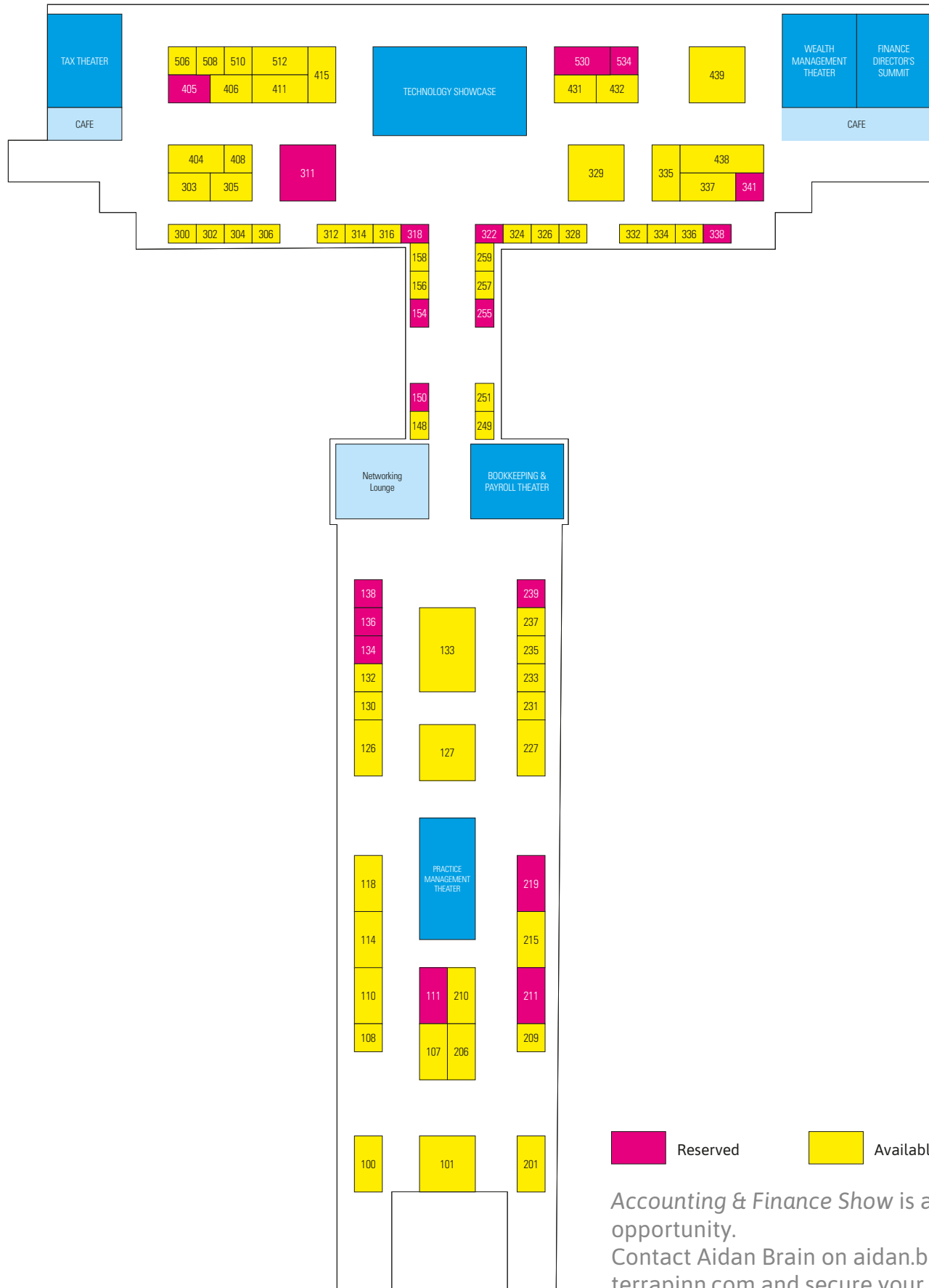
# DAY 2

Conference Day Two – Thursday July 12th

## PLENARY KEYNOTES

8:00	Plenary Keynote: A New Foundation for American Greatness? Analysis of the upcoming tax reform					
8:25	Plenary Keynote: Tax, the Good, the Bad and the Ugly					
9:15	<i>Platinum Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
	 <b>TECHNOLOGY THEATER</b>	 <b>BOOKKEEPING AND PAYROLL THEATER</b>	 <b>FINANCE DIRECTOR'S SUMMIT</b>	 <b>TAX MANAGEMENT THEATER</b>	 <b>WEALTH MANAGEMENT THEATER</b>	 <b>PRACTICE MANAGEMENT THEATER</b>
9:40t	TECHNOLOGY INNOVATION SHOWCASE	How HR leaders optimize workflow with technology	PANEL: Why finance directors should be tech evangelists	Analytics in tax planning	How Fintech is disrupting financial planning	Big data and analytics in practice management
10:05	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
10:30		Machine learning and OCR: data entry made simple	Grow your business with the next generation of advanced analytics and big data	Easing tax season workload compression	Wealth advisors in the face of tax reform and market pressures	OXFORD DEBATE: Value-based pricing vs hourly billing
10:55	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
11:20		Bridging the GAAP: implementing the new Lease Accounting Standard	Grow your business with the next generation of advanced analytics and big data	PANEL SESSION: Uncovering illicit financial activity	PANEL SESSION: Going it alone vs financial planning in a CPA firm	How to transform outreach strategies for new clients
11:45	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
12:10	Blockchain: Accounting tech of the future	Workflow solutions in tech	Cost management for CFOs: reduce spend without reducing growth	FASBs revenue recognition standards for non-profits	Life insurance industry trends and future outlook	PANEL: Diversity and inclusion in accounting
12:35	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
1:00	Digital change management: streamlining internal adoption	eCommerce accounting for the 21st century	Recruiting right: building your financial team	Stolen Identity Refund Fraud (SIRF) and how to identify it	Ethics in wealth management	Beyond compliance: Adding advisory services to your practice
1:25	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
1:50	Managing a business in the Cloud	How changes to revenue recognition will affect bookkeepers and accountants	Address cybersecurity vulnerability to protect your firm	Taxing the Cloud: Nexus and sales tax	Forensic accountancy for risk management	Increasing net worth and intrinsic value
2:15	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
2:40	PANEL SESSION: Cybersecurity in large firms	Workforce analytics: a new dimension to human capital management	IT infrastructure for maximum financial productivity	Enhancing the quality of your auditing process	Navigating the maze: Today's landscape of long term care	The customer-centric CPA: a focus on service and experience
3:05	<i>Sponsorship Available: For speaking opportunities, contact Aidan Brain at +1 646 619 1776 or aidan.brain@terrapinn.com</i>					
3:30	OXFORD DEBATE: Will commoditization kill off accountancy?	Big data and analytics for bookkeeping	Securing funding for small businesses	Tackling fraud with technology	Auditing alternative investments	Succession planning for your practice
4:00	CONFERENCE ENDS					

# FLOORPLAN



# SPONSORS & PARTNERS

## GOLD SPONSOR



## EXHIBITORS



## MEDIA PARTNERS



Accounting & Finance Show is all about opportunity.  
 Contact Aidan Brain on [aidan.brain@terrapinn.com](mailto:aidan.brain@terrapinn.com) and secure your place now.



# CONTACT US

## **SPONSORSHIP, PARTNERSHIPS & CONFERENCE**

Aidan Brain now on + 1 646 619 1776  
or email [Aidan.brain@terrapinn.com](mailto:Aidan.brain@terrapinn.com)

## **EXHIBITION SALES**

Chris Murdoch now on + 1 646 619 1783  
or email [chris.murdoch@terrapinn.com](mailto:chris.murdoch@terrapinn.com)

## **MARKETING OPPORTUNITIES**

Lauren Geary now on + 1 646 619 1807  
or email [lauren.geary@terrapinn.com](mailto:lauren.geary@terrapinn.com)

## **GENERAL ENQUIRIES**

Martin Kelly now on + 1 646 619 1794  
or email [martin.kelly@terrapinn.com](mailto:martin.kelly@terrapinn.com)

[www.terrapinn.com/AccountingShowNY](http://www.terrapinn.com/AccountingShowNY)