

2026 Americas Regional Meeting Overview



Sunday, May 31

9:00am - 3:00pm - City Tour Option 1: Olympic Park Adventures*

10:00am - 3:30pm - City Tour Option 2: Guided Tour of Olympic Park*

6:30pm - 9:00pm - Welcome Reception

Monday, June 1

Companion Tour

7:00am - 8:00am - Breakfast

8:00am - 8:45am - Welcome & Opening Remarks

8:45am - 10:00am - Opening Keynote: Building an All-In Culture, Managing Change

10:00am - 10:30am - Morning Break & Exhibit Time

10:30am - 12:10pm - Breakout Sessions 1

12:10pm - 1:10pm - Lunch & Exhibit Time

1:10pm - 2:50pm - Breakout Sessions 2

2:50pm - 3:20pm - Afternoon Break & Exhibit Time

3:20pm - 5:00pm - Breakout Sessions 3

6:30pm - 10:00pm - Dinner at This Is The Place Heritage Park

9:15am - 2:30pm Historic Main Street* - Learn the architecture, people, and notable events of Park City's unique history, followed by lunch and shopping.

Tuesday, June 2

Companion Tour

7:00am - 8:00am - Breakfast & Women's Professional Development Roundtables

8:00am - 9:40am - Breakout Sessions 4

9:40am - 10:10am - Morning Break & Exhibit Time

10:10am - 11:50am - Breakout Sessions 5

11:50am - 1:00pm - Lunch & Exhibit Time

1:00pm - 2:40pm - Breakout Sessions 6

2:40pm - 3:20pm - Afternoon Break & Exhibit Time

3:20pm - 4:35pm - Closing Keynote: Inspiring Greatness Through G.R.I.T.

4:35pm - 4:45pm - Closing Remarks

6:30pm - 10:00pm - Dinner at the Museum of National History Utah

9:15am - 2:00pm Salt Lake City Bus Tour* - 20-mile panoramic overview of some of the best sites in Salt Lake City while hopping off for some great candid shots.

Wednesday, June 3

8:00am - 4:00pm - Optional Add-On Workshop: Transforming Time and Talent: Building a Truly Future-Forward Firm*

12:00pm - 1:00pm - Lunch

*Additional fees apply.

2026 Americas Regional Meeting Agenda

Monday, June 1



	PRAC MGMT	US TAX	US A&A/NFP	BV	HR	CAS	Technology	Canadian Tech
7:00am - 8:00am	Breakfast							
8:00am - 8:45am	Welcome & Opening Remarks - Pat Smith, CPA, CGA, Managing Partner, Empire CPA							
8:45am - 10:00am	Opening Keynote: Building an All-In Culture, Managing Change and Enhancing Engagement - Chester Elton, New York Times Bestselling Author							
10:00am - 10:30am	Break & Exhibit Time							
10:30am - 11:20am	What Independent Firms Need to Do to Remain Independent - Mike Platt	Federal Tax Update for Individuals - Joe Nicola	Audit Transformation: Unpacking the Benchmark Survey - Ericka Harris Racca	Business Valuation Update - Benjamin Westcott	Be the Leader Nobody Wants to Leave - Julie Kniseley	CAS for CPA Firms: Strategies for Growth and Success - Randy Johnston	PowerBi for CPAs - Nate Poppema	
11:20am - 12:10pm			Audit Tech Stack Review - Donny Shimamoto	Cannabis Industry Update - Michael Harlow	Beyond Technical Training: Building a Culture of Learning that Retains and Elevates Talent - Nancy Whatley-Blaine	Tech Stack Review for CAS - Randy Johnston	Microsoft CoPilot: Best Practices - William Novak	
12:10pm - 1:10pm	Lunch & Exhibit Time							
1:10pm - 2:00pm	CPA Firm Update: Technology & Strategy for the Evolving Profession - Randy Johnston	State and Local Tax Hot Topics: 2026 and Beyond - David Hughes and Jordan Goodman	Communicating Effectively with a Not-for-Profit Board - Abel Sanchez and Brian Todd	Report-Writing: The Good, the Bad, and the Ugly - Kerry Bean	"All-In" Culture (Keynote Follow-up Workshop) - Chester Elton	Expanding Your Firm's Advisory Services - Donny Shimamoto	IT Roundtable - William Novak and Norm Wilson	Canadian Roundtable: Busy Season Debrief - Syed Faiz Jaffar
2:00pm - 2:50pm			Fraud in the Real World: Assessing Risk and Response - Ralph Litloff			Making the Switch to Value Pricing - Amy Bridges		Canadian HR Roundtable - Jordan McLean
2:50pm - 3:20pm	Break & Exhibit Time							
3:20pm - 4:10pm	Change: Turning Uncertainty into Opportunity - Amanda Garner	Tax Roundtable - Mike McNerney and Daria Palaschak	Peer Review Update - Fran McClintock	BV Roundtable - Kerry Bean & Benjamin Westcott	HR Roundtable Carol Hargenrader, Lauren Kornegay, Hillary Miller and Taylor Simpkins	CAS Roundtable - Susan Virgin	Tech Stack Review for IT - Randy Johnston	Change: Turning Uncertainty into Opportunity - Amanda Garner
4:10pm - 5:00pm			Trending A&A Liability Issues Facing CPA Firms - Duncan Will				Data Security and Privacy Issues and Solutions - Randy Johnston	
6:30pm - 10:00pm	Social Event							

The above sessions are tentative and subject to change.

Revised 5/26/26



2026 Americas Regional Meeting Agenda

Tuesday, June 2

	PRAC MGMT	US TAX	US A&A/NFP	BV	HR	CAS	Technology	Canadian Tech
7:00am - 8:00am	Breakfast							
7:00am - 8:00am	Women's PD Roundtable Breakfast							
8:00am - 8:50am	Professional Opportunities Update - Lexy Kessler	Federal Tax Update for Businesses - Joe Nicola	Quality Standards: Lessons Learned - Kurt Oestrieher	Cost of Capital - Riley Busenlener	Workplace Assessments: Worth It or Not? - Taylor Simpkins and Katie Lawson	Professional Opportunities Update - Lexy Kessler	AI Panel For Technology - Randy Johnston	
8:50am - 9:40am	AGN Americas Board Meeting		BV & A&A Panel: Opportunities to Work Together - Benjamin Westcott	BV & A&A Panel: Opportunities to Work Together - Benjamin Westcott		Wrapping Your CAS Apps in Workflow - Donny Shimamoto		
9:40am - 10:10am	Networking Break & Exhibit Time							
10:10am - 11:00am	IPA Survey Results Presentation - Chelsea Summers	AI Panel for Tax - Randy Johnston	Accounting & Auditing Update - Kari Hipsak	Litigation Update - Ralph Litolff	Learning & Development Roundtable - Nancy Whatley-Blaine	SSARS v New Consulting Standards - Kurt Oestrieher	Virtual CISO - The good, the bad, and the unexpected - Mike Ellerhorst	
11:00am - 11:50am				Discounts Panel - Kerry Bean	Hiring Strategies for Your IT Team - Matt Clarin	Incorporating Benchmarking Into Your Compliance Services - Donny Shimamoto	Hiring Strategies for Your IT Team - Matt Clarin	
11:50am - 1:00pm	Lunch & Exhibit Time							
1:00pm - 1:50pm	Managing Partners Roundtable - Patrick Smith, Malcolm Ward and Christian Moises	The One Big Beautiful Bill: Navigating the New Era of Specialty Tax - Dave McGuire and David Seibel	A&A/NFP Roundtable - Abel Sanchez and Brian Todd	Growing Your Valuation Practice - Jordan Kerns and Rich Waigand	Successful Staffing Strategies to Close the Accounting Talent Gap - Donny Shimamoto	Client Assessments for CAS - Amy Bridges	Internal IT Roundtable - William Novak and Norm Wilson	Select Issues in Canadian Corporate Reorganizations - Christa Gillis
1:50pm - 2:40pm		Estate Planning for the Closely Held Business Owner Before and After the Liquidity Event - Jeffrey Zaluda		Business Valuation Standards in Motion: Applying Rigor When Conditions Change - Kerry Bean	Beyond the Breaking Point: Redefining Mental Health in the Accounting Profession - Randy Crabtree	Engagement Letters, Disengagement Letters and More - Duncan Will		Structures for American Business Activity in Canada - Sikander Khan and Glen MacMillan
2:40pm - 3:20pm	Break & Exhibit Time (Note: The exhibit hall closes at 3:20pm.)							
3:20pm - 4:35pm	Closing Keynote: Inspiring Greatness Through G.R.I.T.: Igniting the Passion and Perseverance to Pursue the Impossible - Robin Benincasa, New York Times Bestselling Author, CNN Hero, and Founder, The Project Athena Foundation							
4:35pm - 4:45pm	Closing Remarks							
6:30pm - 10:00pm	Social Event							

The above sessions are tentative and subject to change.

Revised 5/26/26

