

CONFERENCE SCHEDULE

| Wednesday November 20, 2019 | | CPE Hrs | CLE Hrs |
|------------------------------------|--|------------|------------|
| Party Activities 5:00 - 6:30 pm | Casino Play & Silent Auction <i>Live@Jack's in Denver Pavilions</i> | | |
| Party Activities 6:30 - 6:50 | Casino Play <i>Live@Jack's in Denver Pavilions</i> | | |
| Dinner & Session 1 7:00 - 7:50 | Dinner CPE - Keynote: Taking Risks in 2020 (and Hoping to Get Caught!) Luke Wyckoff, Chief Visionary Officer, Social Media Energy <i>Live@Jack's in Denver Pavilions</i> | 1.0 | |
| Closing 7:50 - 8:30 pm | Winners Announced <i>Live@Jack's in Denver Pavilions</i> | | |

| Thursday November 21, 2019 | | CPE Hrs | CLE Hrs | | |
|---|---|---|--|-----|-----|
| Breakfast 7:30 - 8:00 | Registration & Warm Breakfast <i>MDC/Richmond Terrace Room</i> | | | | |
| Intros 8:00 - 8:10 | Introduction & Welcome <i>MDC/Richmond Terrace Room</i> | | | | |
| Session 1 8:10 - 9:00 | Mergers & Acquisitions Best Practices Panel Daniel J. Block, Shareholder, Robinson Waters & O'Dorisio, P.C. Mark Barr, Tax Manager, CBIZ Mike Abramovitz, Executive Director Global Tax, Director Finance Operations & Assistant Secretary, Vectrus Tim Gentry, CFO, Liberty Doors and Windows Moderated by Tim Mathis, VP Tax, Sunnova Energy Corp. <i>MDC/Richmond Terrace Room</i> | 1.0 | 1.0 | | |
| Session 2 9:10 - 10:00 | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;">Start-Up Dos and Don'ts (including tax and financial considerations) - Part I Brenda Sherrodd, Owner/Consultant, Tech Solutions for Accounting Diane Yetter, Founder, Sales Tax Institute Gregory Clifton, Chair of Accounting, Metropolitan State University Denver RJ Banat, CFO, Jagged Mountain Craft Brewery Moderated by Jay McCauley, Managing Director, Oxford Tax Recruiting <i>MDC/Richmond Terrace Room</i></td> <td style="width: 50%; text-align: center;">Technology that Adds Value (demonstrations of tools, including bots and AI) Blair Crisman, Tax Director, PwC Weston Smith, Manager, PwC <i>Berger/Nichols "Green" Classroom</i></td> </tr> </table> | Start-Up Dos and Don'ts (including tax and financial considerations) - Part I Brenda Sherrodd, Owner/Consultant, Tech Solutions for Accounting Diane Yetter, Founder, Sales Tax Institute Gregory Clifton, Chair of Accounting, Metropolitan State University Denver RJ Banat, CFO, Jagged Mountain Craft Brewery Moderated by Jay McCauley, Managing Director, Oxford Tax Recruiting <i>MDC/Richmond Terrace Room</i> | Technology that Adds Value (demonstrations of tools, including bots and AI) Blair Crisman, Tax Director, PwC Weston Smith, Manager, PwC <i>Berger/Nichols "Green" Classroom</i> | 1.0 | 1.0 |
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| Session 4 11:10 - 12:00 | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;">M&A SALT Considerations - Direct and Indirect Taxes Jay Forester, J.D., LL.M., Manager, Plante Moran Jeanette Tolar, Sr. Tax Manager, Plante Moran <i>MDC/Richmond Terrace Room</i></td> <td style="width: 50%; text-align: center;">Federal Incentives Update (R&D credit and more) Jamie Overberg, Partner, TaxOpsMin <i>Berger/Nichols "Green" Classroom</i></td> </tr> </table> | M&A SALT Considerations - Direct and Indirect Taxes Jay Forester, J.D., LL.M., Manager, Plante Moran Jeanette Tolar, Sr. Tax Manager, Plante Moran <i>MDC/Richmond Terrace Room</i> | Federal Incentives Update (R&D credit and more) Jamie Overberg, Partner, TaxOpsMin <i>Berger/Nichols "Green" Classroom</i> | 1.0 | 1.0 |
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| Session 7 2:10 - 3:00 | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;">Firm Management - Best Practices Jody Padar, CEO, New Vision CPA Group <i>MDC/Richmond Terrace Room</i></td> <td style="width: 50%; text-align: center;">Colorado: An Example of Post-Wayfair Complications Mary Jo Zuelsdorf, State And Local Tax Manager, CBIZ <i>Berger/Nichols "Green" Classroom</i></td> </tr> </table> | Firm Management - Best Practices Jody Padar, CEO, New Vision CPA Group <i>MDC/Richmond Terrace Room</i> | Colorado: An Example of Post-Wayfair Complications Mary Jo Zuelsdorf, State And Local Tax Manager, CBIZ <i>Berger/Nichols "Green" Classroom</i> | 1.0 | 1.0 |
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| Session 8 3:10 - 4:00 | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;">Saying No: Setting Boundaries and Expectations Amanda Hines, Of Counsel, Morrison Foerster Chris Becze, Partner, Tax, Armanino Debbie Murray, Associate Director, Avitus Group, Inc. Tim Gentry, CFO, Liberty Doors and Windows <i>MDC/Richmond Terrace Room</i></td> <td style="width: 50%; text-align: center;">To Be Announced Dill Dill Carr Stonbraker & Hutchings P.C. <i>Berger/Nichols "Green" Classroom</i></td> </tr> </table> | Saying No: Setting Boundaries and Expectations Amanda Hines, Of Counsel, Morrison Foerster Chris Becze, Partner, Tax, Armanino Debbie Murray, Associate Director, Avitus Group, Inc. Tim Gentry, CFO, Liberty Doors and Windows <i>MDC/Richmond Terrace Room</i> | To Be Announced Dill Dill Carr Stonbraker & Hutchings P.C. <i>Berger/Nichols "Green" Classroom</i> | 1.0 | 1.0 |
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| Session 9 4:10 - 5:00 | Keynote: Thrive in Tax: Finding Your Passion and the Skills You Need to Succeed Diane Yetter, Founder, Sales Tax Institute <i>MDC/Richmond Terrace Room</i> | 1.0 | | | |

| Friday November 22, 2019 | | CPE Hrs | CLE Hrs | | | |
|---|---|---|---|---|-----|-----|
| Breakfast 7:30 - 8:00 | Registration & Warm Breakfast <i>MDC/Richmond Terrace Room</i> | | | | | |
| Intros 8:00 - 8:10 | Introduction & Welcome <i>MDC/Richmond Terrace Room</i> | | | | | |
| Session IA 8:00 - 8:50 | Regulatory Ethics - Part IB, Colorado State Board of Accountancy Statutes, Rules and Regulations (R&R) Rebecca Campbell, CPE Director, Colorado Society of CPAs <i>MDC/Richmond Terrace Room</i> | 1.0 | 1.0 | | | |
| Session IB 8:10 - 9:00 | Regulatory Ethics - Part IIA, Protecting Client Data (and Your Practice!) Josh Seedig, Director, Risk Advisory Services, Experis US, Inc. <i>Berger/Nichols "Green" Classroom</i> | 1.0 | 1.0 | | | |
| Session 2 9:00 - 9:50 | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;">Regulatory Ethics - Part IIB, Colorado State Board of Accountancy Statutes, Rules and Regulations (R&R) Rebecca Campbell, CPE Director, Colorado Society of CPAs <i>MDC/Richmond Terrace Room</i></td> <td style="width: 50%; text-align: center;">Regulatory Ethics - Part IIA, Protecting Client Data (and Your Practice!) Josh Seedig, Director, Risk Advisory Services, Experis US, Inc. <i>Berger/Nichols "Green" Classroom</i></td> </tr> </table> | Regulatory Ethics - Part IIB, Colorado State Board of Accountancy Statutes, Rules and Regulations (R&R) Rebecca Campbell, CPE Director, Colorado Society of CPAs <i>MDC/Richmond Terrace Room</i> | Regulatory Ethics - Part IIA, Protecting Client Data (and Your Practice!) Josh Seedig, Director, Risk Advisory Services, Experis US, Inc. <i>Berger/Nichols "Green" Classroom</i> | 1.0 | 1.0 | |
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| Session 3 10:00 - 10:50 | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;">Regulatory Ethics - Part III, IRS and State Tax Audits - Best Practices Panel Janet Fanska, Owner, Fanska CPA LLC Judy Vorndran, Partner, TaxOps Mary Jo Zuelsdorf, State And Local Tax Manager, CBIZ Olena Ruth, Associate, Merriam Law Firm, P.C. <i>MDC/Richmond Terrace Room</i></td> <td style="width: 50%; text-align: center;">The 3 Ps Behind Effective Teams: Policies, Procedures, and Protocols Ben Johnson, Independent Consultant Dave Alexander, Senior Technical Manager - Indirect Tax Services, Experis US, Inc. Diane Yetter, Founder, Sales Tax Institute Jay Levinson, Senior Manager, Grant Thornton LLP <i>Berger/Nichols "Green" Classroom</i></td> </tr> </table> | Regulatory Ethics - Part III, IRS and State Tax Audits - Best Practices Panel Janet Fanska, Owner, Fanska CPA LLC Judy Vorndran, Partner, TaxOps Mary Jo Zuelsdorf, State And Local Tax Manager, CBIZ Olena Ruth, Associate, Merriam Law Firm, P.C. <i>MDC/Richmond Terrace Room</i> | The 3 Ps Behind Effective Teams: Policies, Procedures, and Protocols Ben Johnson, Independent Consultant Dave Alexander, Senior Technical Manager - Indirect Tax Services, Experis US, Inc. Diane Yetter, Founder, Sales Tax Institute Jay Levinson, Senior Manager, Grant Thornton LLP <i>Berger/Nichols "Green" Classroom</i> | 1.0 | 1.0 | |
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| Session 4 11:00 - 11:50 | <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;">Regulatory Ethics - Part IV, Financial Reporting & Audit Jill Schulz, Audit - Senior Manager, Grant Thornton LLP <i>MDC/Richmond Terrace Room</i></td> <td style="width: 50%; text-align: center;">State Tax Update - Indirect Taxes Dave Alexander, Senior Technical Manager - Indirect Tax Services, Experis US, Inc. <i>Berger/Nichols "Green" Classroom</i></td> </tr> </table> | Regulatory Ethics - Part IV, Financial Reporting & Audit Jill Schulz, Audit - Senior Manager, Grant Thornton LLP <i>MDC/Richmond Terrace Room</i> | State Tax Update - Indirect Taxes Dave Alexander, Senior Technical Manager - Indirect Tax Services, Experis US, Inc. <i>Berger/Nichols "Green" Classroom</i> | 1.0 | 1.0 | |
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| Session 9 4:00 - 4:50 | Keynote: Supercharge the Path to Success by Practicing Everyday Innovation Jody Padar, CEO, New Vision CPA Group <i>MDC/Richmond Terrace Room</i> | 1.0 | | | | |
| Closing 4:50 - 5:00 | Closing Remarks & Prize Winners Announced <i>MDC/Richmond Terrace Room</i> | | | | | |

| Color Legend | | |
|---------------------|----------------------|-------------------------------|
| Administrative | Regulatory Ethics CE | Soft skill CE |
| Technical CE | Practice related CE | Soft skill CE - includes meal |