

86th Annual SYMPOSIUM

Tuesday, November 18, 2025 | Grandover Resort & Spa

TIME		SESSION TITLE	SPEAKER	LOCATION
7:00 am	8:00 am	Registration & Breakfast		
8:00 am	8:55 am	(GS4) Ethical Choices- CLE Approved	Cal Christian	Grandville Ballroom
8:55 am	9:05 am	Networking Break		
9:05 am	10:05 am	(GS5) Future Ready Finance: Motivating the Next Workforce	Alex Theis	Grandville Ballroom
10:05 am	10:15 am	Networking Break		
10:15 am	11:45 am	(GS6) Professional Update - Panel	Kelly Puryear Mark Sotichack Kecia Williams Smith	Grandville Ballroom
11:45 am	1:00 pm	Lunch		
1:00 pm	2:15 pm	(4A) Trusts Under the Big Beautiful Bill: Key Planning Impacts and Considerations -CLE Approved	Art Werner	Grandville AB
		(4B) Critical Thinking in a Changing World	Alex Theis	Grandville CD
		(4C) Become a Data Analysis Expert	Bryan Smith	Whitehall
		(4D) Performing a State Nexus Study in an Ever-Changing State Tax Environment	Jeremy Migliara	Carlisle
2:15 pm	2:25 pm	Networking Break		
2:25 pm	3:30 pm	(5A) Financial Planning After the Big Beautiful Bill: What CPAs Need to Watch- CLE Approved	Art Werner	Grandville AB
		(5B) FAQ for Accounting and Disclosure When Faced With Uncertainty – Such as Natural Disasters and the Economy	Jennifer Louis	Grandville CD
		(5C) Get Started with Power BI	Bryan Smith	Whitehall
		(5D) NC Sales Tax Review & Update	Jack Schmoll	Carlisle
3:30 pm	3:45 pm	Networking Break		
3:45 pm	4:50 pm	(6A) The Big Beautiful Bill and Entity Planning: S Corporations, C Corporations, and LLC Strategies- CLE Approved	Art Werner	Grandville AB
		(6B) Embedding Enterprise-Risk Management Principles into Accounting and Finance	Jennifer Louis	Grandville CD
		(6C) The Must Know Features of Excel	Bryan Smith	Whitehall
		(6D) Property Tax Exemptions and Exclusions in NC: Guiding you from A to Z	Jim Turner	Carlisle
5:00 pm	6:00 pm	Reception with Sponsor Giveaways		Grandview Room (2 nd Floor)

