

2026 CPE Beach Cluster Agenda

Tuesday, August 11, 2026 | Holiday Inn Resort—Wrightsville Beach

SESSION TIME		SESSION TITLE	SPEAKER	MEETING ROOM
7:00	8:00 am	Registration & Continental Breakfast		
8:00 am	11:45 am	(1A) Surgent's Individual Income Tax Update	Susan Smith	Causeway/Masonboro
		(1B) Technology Trends and Hot Topics Impacting the Accounting Profession	Kerry Roberts	Airlie/Tidewater
11:45	12:15 pm	Lunch		
12:15	4:00 pm	(2A) Key Partnership and S Corporation Tax Planning Strategies	Susan Smith	Causeway/Masonboro
		(2B) Integrated Planning, Forecasting, and Budgeting for Organizational Success	Kerry Roberts	Airlie/Tidewater

Wednesday, August 12, 2026 | Holiday Inn Resort—Wrightsville Beach

SESSION TIME		SESSION TITLE	SPEAKER	MEETING ROOM
7:00	8:00 am	Registration & Continental Breakfast		
8:00 am	11:45 am	(3A) Buying and Selling a Business: Tax and Structuring Overview	Susan Smith	Causeway/Masonboro
		(3B) Critical Issues That CPAs in Industry Will Need to Face This Year	Kerry Roberts	Airlie/Tidewater
		(3C) Guide and Update to Compilations, Reviews, and Preparations	Thomas Newell	Turtlewatch
11:45	12:15 pm	Lunch		
12:15	4:00 pm	(4A) Select Estate & Life Planning Issues for the Middle-Income Client	Susan Smith	Causeway/Masonboro
		(4B) Controller/CFO Update: Hot Topics Facing Today's Financial Professional	Kerry Roberts	Airlie/Tidewater
		(4C) Artificial Intelligence and Generative AI in Accounting, Finance, and Cybersecurity: Opportunities and Threats	Thomas Newell	Turtlewatch

Thursday, August 13, 2026 | Holiday Inn Resort—Wrightsville Beach

SESSION TIME		SESSION TITLE	SPEAKER	MEETING ROOM
7:00	8:00 am	Registration & Continental Breakfast		
8:00 am	11:45 am	(5A) Surgent's Individual Tax Planning Ideas	Susan Smith	Causeway/Masonboro
		(5B) Unlocking AI: Fundamentals and Generative AI for Accountants	Kerry Roberts	Airlie/Tidewater
		(5C) Current Issues in Accounting and Auditing: An Annual Update	Thomas Newell	Turtlewatch
11:45	12:15 pm	Lunch		
12:15	4:00 pm	(6A) Securing a Comfortable Retirement	Susan Smith	Causeway/Masonboro
		(6B) Gaining a Competitive Advantage: Critical Skills for CFOs and Controllers	Kerry Roberts	Airlie/Tidewater
		(6C) Fraud Case Studies: Schemes and Controls	Thomas Newell	Turtlewatch

Friday, August 14, 2026 | Holiday Inn Resort—Wrightsville Beach

SESSION TIME		SESSION TITLE	SPEAKER	MEETING ROOM
7:00	8:00 am	Registration & Continental Breakfast		
8:00 am	11:45 am	(7A) Maximizing Your Social Security Benefits	Susan Smith	Causeway/Masonboro
		(7B) Incident Response and Cybersecurity Risk Management in AI Powered Financial Systems	Kerry Roberts	Airlie/Tidewater

Holiday Inn Resort Map

