SYM
87TH ANNUAL SYMPOSIUM

87th Annual Symposium

Monday, November 16, 2026 | Grandover Resort & Spa

TIME		SESSION TITLE	SPEAKER	LOCATION
7:00 am	8:00 am	Registration & Breakfast		
8:00 am	9:15 am	(GS1) Focus on the Profession: Leading Through the Transformation	Mark Soticheck Alex Lehmann Robert Broome	Grandville Ballroom
9:15 am	9:30 am	Break		
9:30 am	10:35 am	(GS2) Don Farmer's 2026 Federal Tax Update	Bill Harden	Grandville Ballroom
10:35 am	10:45 am	Break		
10:45 am	11:45 am	(GS3) NC State Tax Update	Keith Wood	Grandville Ballroom
11:45 am	1:00 pm	Lunch	Grandview Room (2nd Floor)	
1:00 pm	2:15 pm	(1A) Don Farmer's 2026 Individual Tax Update	Bill Harden	Grandville AB
		(1B) Real-World Technology Transformation Panel	Holly Sullenger Andy Newman Sterling Porter Bill LeFew	Grandville CD
		(1C) Auditing Standards Board Update	Mike Manspeaker	Whitehall
2:15 pm	2:25 pm	Break		
2:25 pm	3:30 pm	(2A) Hidden in Plain Sight: Lesser-Known Provisions in the OBB	Victoria Boon	Grandville AB
		(2B) The Art of Using Critical and Creative Thinking	Holly Sullenger	Grandville CD
		(2C) Mergers & Acquisitions: Exit Strategies for Long-Term Value and Legacy	Heyward Armstrong Ryan Mas Daniel Welborn Drew Hinnant	Whitehall
3:30 pm	3:45 pm	Break		
3:45 pm	4:50 pm	(3A) Ethical Use of Artificial Intelligence in a Circular 230 Practice	Steve Boon	Grandville AB
		(3B) How to Communicate Successfully in Today's Professional Workplace	Holly Sullenger	Grandville CD
		(3C) Building the Next Generation of Accountants	Dr. Felicia Farrar	Whitehall
5:00 pm	6:00 pm	Reception	Grandview Room (2nd Floor)	

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TIME		SESSION TITLE	SPEAKER	LOCATION
7:00 am	8:00 am	Registration & Breakfast		
8:00 am	9:05 am	(GS4) The Future of the CPA Profession: What Leaders Must Do Now	Dr. Felicia Farrar	Grandville Ballroom
9:05 am	9:20 am	Break		
9:20 am	10:30 am	(GS5) Economic Update	Mark Vitner	Grandville Ballroom
10:30 am	10:40 am	Break		
10:40 am	11:45 am	(GS6) Building a Career That Doesn't Collapse	Cal Christian	Grandville Ballroom
11:45 am	1:00 pm	Lunch	Grandview Room (2nd Floor)	
1:00 pm	2:15 pm	(4A) Small Firm Challenges and Opportunities: Practical Strategies for Today's CPA Firm	Stephanie Otero	Grandville AB
		(4B) What's New in Tax Technology: 2026 Tools Worth Your Attention	Randy Johnston	Grandville CD
		(4C) GAGAS and Uniform Guidance Update	Melisa Galasso	Whitehall
2:15 pm	2:25 pm	Break		
2:25 pm	3:30 pm	(5A) Hobby or Hustle? Cracking the IRS 183 Code	Victoria Boon	Grandville AB
		(5B) Practice Management Tools: Client Portals, Workflow Automation & Communication	Randy Johnston	Grandville CD
		(5C) AICPA Ethics Update	Melisa Galasso	Whitehall
3:30 pm	3:45 pm	Break		
3:45 pm	4:50 pm	(6A) Criminal Tax Investigation: From Referral to Resolution	Steve Boon	Grandville AB
		(6B) Practical Productivity Improvements: From Manual to Automated	Randy Johnston	Grandville CD
		(6C) Practical Peer Review	Mike Manspeaker	Whitehall
5:00 pm	6:00 pm	Reception	Grandview Room (2nd Floor)	

87th Annual Symposium

Wednesday, November 18, 2026 | Grandover Resort & Spa

TIME		SESSION TITLE	SPEAKER	LOCATION
7:00 am	8:00 am	Registration & Breakfast		
8:00 am	9:05 am	(7A) A&A Update (FASB)	Mike Cheng	Grandville AB
		(7B) Passing the Torch - Leading Teams and Clients Through Leadership Transitions	Susan Stutzel	Grandville CD
		(7C) Crypto, Compliance & Chaos: Tax, Valuation, and Forensic Issues for Today's CPA	Carolyn J. Woodruff	Whitehall
9:05 am	9:15 am	Break		
9:15 am	10:15 am	(8A) The Art and Science of Financial Leadership: KPIs, Storytelling, and CFO Strategies	Bob Mims	Grandville AB
		(8B) Own It! Build a Culture Where Everyone Takes Responsibility (and Accountability Becomes Easy)	Susan Stutzel	Grandville CD
		(8C) Designing Analytical Procedures in an Audit or Review	Mike Manspeaker	Whitehall
10:15 am	10:30 am	Break		
10:30 am	11:30 am	(9A) Activate and Execute Your Strategy: Turn Planning into Results	Bob Mims	Grandville AB
		(9B) 3 Simple Ways to Make Your Employees Never Want to Leave	Susan Stutzel	Grandville CD
		(9C) Stranded Capital: Why AI Spend Doesn't Convert	Greg Boone	Whitehall
11:30 am	12:45 pm	Lunch	Grandview Room (2nd Floor)	
12:45 pm	2:15 pm	(GS7) From Classroom to Boardroom: Shaping the Next Generation of Accountants	Scott Vandervelde	Grandville Ballroom
2:15 pm	2:25 pm	Break		
2:25 pm	3:30 pm	(GS8) Decoding Team Chemistry: The Love Language of Collaboration	Carl Montante Evan Giokas	Grandville Ballroom
3:30 pm	3:45 pm	Break		
3:45 pm	4:50 pm	(GS9) Putting AI to Work in Real Business Scenarios	Greg Boone	Grandville Ballroom