

Tuesday, November 13, 2018

11/13 4:00PM-8:00PM

Registration Open

Wednesday, November 14, 2018

11/14 7:00AM-5:30PM

Registration Open

11/14 7:30AM-8:45AM

WOM18101. Media/Presentation Skills Workshop

Jill Schlesinger - *Business Analyst | CBS News*

This workshop is not available as part of the Online or Flex Pass registration

CBS News Business Analyst Jill Schlesinger will help you maximize your media appearances and presentation skills to increase client attraction and retention; explain the power of social media; and use mock interviews to demonstrate the good, the bad and the ugly of appearances.

Learning Objectives:

- Overview of the power of a good presentation – to clients, prospects and for the media
 - How to position yourself in the market as a professional
 - Legitimize your practice with the media halo
 - Be relevant to millennial clients (especially via social)
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11/14 8:50AM-10:05AM

WOM18102. Leveraging the Power of Emotional Intelligence for Success

Jennifer Shirkani - *CEO | Penumbra Group*

This workshop is not available as part of the Online or Flex Pass registration

Someone with high Emotional Intelligence (EQ) demonstrates a sensibility – she can influence others more effectively, can manage change well, solves problems calmly, uses humor to build rapport, and remains optimistic even in the face of adversity. This presentation provides details on the characteristics of EQ, gives you an opportunity to test your own EQ and includes ways to

achieve better business results. Join us for this session and learn ways to leverage the power of EQ to improve your self-management skills, gain more interpersonal effectiveness and build stronger influence with others.

Learning Objectives:

- Identify key characteristics of emotional intelligence.
 - Learn ways to use more EQ
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11/14 10:45AM-11:00AM

WOM1800. Chair Welcome and Introductions

Tracey Golden - *AERS Partner | Deloitte Touche LLP* **Jacquelyn Tracy** - *Partner | Mandel & Tracy, LLC*

11/14 11:00AM-12:15PM

WOM1801. From the Pits to Glitz: One Woman's Odyssey from the Trading Floor to the Green Room

What does it take to be one of 8 women among 800 men, three decades prior to MeToo? In this entertaining and informative session, Jill Schlesinger will talk about her

career twists, turns and challenges, from her start on the Commodities Exchange of NY to becoming a CFP advising clients and now to her role at CBS News.

11/14 12:15PM-1:30PM

Lunch

11/14 12:30PM-1:20PM

WOM18LL01. Breaking Through in Business - Female Founders Panel presented by Chase Ink

Sam Saperstein - *Managing Director of Women on the Move | JPMorgan Chase*

Elizabeth Cutler - *Co-Founder of Soul Cycle | Co-Founder of LifeShop*

In this Chase Ink® luncheon panel, four strong business women share their business journey and the role financial mentors and their CPA played along the way. Join Elizabeth Cutler, co-founder of SoulCycle and LifeShop; Melissa Butler, founder and CEO of The Lip Bar; Brittney Castro,

Brittney Castro - *Founder & CEO | Financially Wise Inc.*

Melissa Butler - *Founder & CEO | The Lip Bar*

founder and CEO of Financially Wise, Inc. for their stories, moderated by Sam Saperstein, managing director of Women on The Move at Chase.

11/14 1:30PM-2:45PM

WOM1802. #Timesup - What's Next?

Monica Murray - *Consultant | Monica Murray*

Julie Moore - *President | Employment Practices Group*

Jake Stika - *Executive Director | Next Gen Men*

Not a day goes by without a news story about Times Up in the entertainment, hospitality, factory, and agriculture industries. We know that harassment exists in the corporate world as well. How do we all move forward in this new landscape?

Listen to this powerful panel discuss how men and women can support their colleagues and ultimately shift workplace cultures toward a safe, fair and dignified environment. Learning Objectives:

Brande Stellings - *Diversity, Inclusion & Strategy Consultant | Previously with Catalyst*

- Definition of harassment in the workplace;
- Suggestions of how to handle difficult situations involving harassment in the workplace

11/14 2:50PM-4:05PM

WOM1803. Risk, Resilience and Reward... Inspiring Confidence. Empowering Change.

Lynne Doughtie - *Chairman and CEO | KPMG LLP*

Keys to Helping Women advance in their careers

Learning Objectives:

- Learn potential strategies and approaches to professional growth and development of women professionals
- Reaching in to help each other—and the next generation of women—succeed

11/14 4:05PM-5:30PM

Welcome Reception & Vendor Displays

Thursday, November 15, 2018

11/15 6:30AM-5:30PM

Registration Open

11/15 6:30AM-8:00AM

Continental Breakfast & Vendor Displays

11/15 8:00AM-9:15AM

WOM1804. Empowerment and Inspiration: Rising Through the Ranks

Maria Contreras-Sweet - *President | Contreras-Sweet Enterprises
(Former Administrator of the Small Business Administration)*

Join this session to hear a story of empowerment and inspiration. The Honorable Maria Contreras-Sweet will speak about her journey and how she progressed in business and in life - from emigrating to the United States from Guadalajara at age 5, to serving in President Obama's cabinet as head of the Small Business Administration— Secretary Sweet shares how she navigated male dominated industries, her struggles, successes and more. Learning Objectives:

- Select new ways of thinking to bring back to office and implement.
- Recognize how to assist your small business clients in successfully navigating challenges ahead
- How diversity can improve your business

11/15 9:20AM-10:35AM

WOM1805. Go Beyond

Barry Melancon - *CEO | Association of International Certified Professional Accountants*

In this era of unprecedented and fast-paced change, the accounting profession can go beyond disruption by embracing the limitless possibilities it offers to remain vital and relevant well into the future. Learning Objectives:

- The latest trends reshaping the accounting profession
- How technology can enable us to enhance quality in existing service areas, and provide opportunity in new service areas our clients and businesses increasingly demand
- How to evolve our skillsets to remain trusted advisors in an increasingly digital world

11/15 10:35AM-11:05AM

Networking Break - Refreshments & Vendor Displays

11/15 11:05AM-11:55AM

WOM1806. Supporting Change

Sarah Elliott - *Principal and Co-Founder | Intend2Lead LLC*

It's commonly said that the only constant in life is change. Change is undeniable, in business and in life. Yet so many of us resist it all the same! As a leader, how can you help your team navigate the unknown waters of change and empower them to be on the forefront of change? In this session, we'll explore some practical ways you can positively support change in others. Learning Objectives:

- Understand the phases of change
- Explore practical ways to positively support change in others

11/15 11:05AM-11:55AM

WOM1807. Future Proof Your Career

Jennifer Gardner - *Communications Manager | Association of International Certified Professional Accountants*

In a world with bots, artificial intelligence and machine learning being able to develop your people, business and leadership skills alongside your technical skills is critical for success. Learn how to develop a focused path forward that leverages new technical skills and your increasingly important Human Intelligence in a way that delivers value in the workplace and future-proofs your career. Learning Objectives:

Clar Rosso - *Executive Vice President, Engagement and Learning Innovation | Association of International Certified Professional Accountants*

- Discover critical competencies to develop for future success
- Learn ways to integrate learning into your daily routine

11/15 11:05AM-11:55AM

WOM1808. Unconscious Bias

Siri Chilazi - *Researcher | Women and Public Policy Program, Harvard Kennedy School*

Unconscious bias is a key cause of gender inequality in organizations today, yet de-biasing people's minds is virtually impossible. How, then, can we create a level playing field in the workplace? In this session, we'll discover the latest insights from gender and behavioral research and learn how they can be used to close gender gaps through improved talent management and more inclusive culture.

Learning Objectives:

- Develop an understanding of unconscious bias and its manifestations in organizations and workplaces
- Discover practical interventions to mitigate the effects of unconscious bias

11/15 11:55AM-12:05PM

Change Break

11/15 12:05PM-12:55PM

WOM1809. Advancing Gender Equality in the Workplace: What Works

Andrea Yandreski - *Partner | McKinsey & Company*

A multitude of studies have demonstrated that achieving gender balance is not only beneficial to every organization's culture but also has a direct impact on the organization's customers and economic prosperity. While the macroeconomic case for gender diversity is strong, it has not been persuasive on its own in creating a significant improvement in diversity numbers in organizations. Many companies implement a broad variety of measures to increase gender diversity at each level of their organization, but too often these programs do not lead to lasting results: women are still underrepresented at senior management levels and companies struggle to make change stick. We can all do more. Join us to discover the successful

Gayatri Shenai - *Partner | McKinsey*

initiatives that some organizations have used to make headway on gender parity and create a space where talented women can thrive and have successful careers. Learn tactical strategies that you can bring back to your organizations to build the case for gender diversity and to drive lasting results.

Learning Objectives:

- Find out about the latest research and best practices for diversity & inclusion programs to bring back to your organizations
- Gain a unique inside perspective on the progress of these programs and where they have stalled

11/15 12:05PM-12:55PM

WOM1810. Leading Up: Partnering With Your Boss

Jennifer Elder - *President | The Sustainable CFO*

Add more value to your organization by Leading Up! Partner with your boss by providing insight, direction, and effort to improve the overall effectiveness of your department. Utilize your strengths strategically and persuasively to achieve more, get more opportunities, and best of all - get promoted!

Learning Objectives:

- Utilize a personal SWOT analysis to analyze themselves and their boss
- Present ideas in an influential and persuasive manner

11/15 12:05PM-12:55PM

WOM1811. Are you your own CFO? Are you too busy to take care of 'YOU'?

Reina Schlager - Financial Advisor & Owner | Schlager Schlager & Levin

Today's Professional Woman is juggling work, family responsibilities, and aging issues for parents – and/or herself. Are you a list-maker? This session will identify a list of life milestones so you can be a step ahead of existing and future financial and health-related challenges. A Traditional Timeline will be expanded to identify issues connected to your 30s, 40s, 50s, and 60s+. Find resources in this session to help you with a STRATEGY to be better prepared for what the future may hold. Useful tips include debunking life insurance myths, Roth vs Traditional, planning for Medicare, the hidden pitfalls of Social Security, and future residential choices – and what you can do now in your own finances and tax picture. Reina Schlager is a

CPA with the PFS (Personal Financial Specialist) designation who has thirty years of experience – and is still working on her juggling skills!

(Ask AICPA for standard firm disclosures)

Learning Objectives:

- Identify lifetime milestones, some personal/some financial, to be better prepared when they occur and/or be better prepared for retirement and life's surprises.
- Become aware of opportunities or deadlines from 30 to death, as well as learn new information about old notions

11/15 12:55PM-2:10PM

Lunch

11/15 1:10PM-2:00PM

WOM18SS01. Leadership Dexterity: Women's Advantage for Workplace Success

Tracey Walker - National Sr. Director of Government Affairs; Culture Diversity and Inclusion | RSM US LLP

What do all high performers know? How do you navigate the challenges of the profession, to become empowered women and the future leaders of the workforce? Join us for a compelling conversation about leveraging leader tools to shape your journey, achieve satisfaction, embrace intersectionality and leverage sponsors and allies for high-impact and meaning. This session is not about memorizing a technical method, but becoming aware of your emotional and business intelligence, how to keep going and use it to your advantage.

Learning Objectives:

Richard Caturano - Partner, National Leader of Culture, Diversity and Inclusion, NCDI Chair | RSM US LLP

Karen Galivan - Partner, Tax Services | RSM US LLP

- Explore the importance of Performance, Image and Exposure in order to develop your Leadership Quotient.
- Increase your awareness of your emotional and business intelligence and leverage these tools for advancement.

11/15 2:10PM-3:25PM

WOM1812. Defining Personas to Drive Bottom Line Success

Misty Megia - Head of Accounting Programs and Education | Intuit

It's been called Personas, Avatars, Target market whatever you choose to call it we are going to fine tune that skill and dig deep into what type of clients you want to attract. Your firm deserves to work with your ideal clients who make every day a pure pleasure to work with. If you are stuck in that rut of accepting anyone who needs your services or you are not increasing your client base as fast as you would like, then please join me in learning a step by step

approach to building your empire. We will focus on how to draw the ideal client, where to find them, and how to build marketing that resonates and leads them to you.

Learning Objectives:

- Building out personas to draw the right clients to you
- How client research can help you develop marketing

11/15 2:10PM-3:25PM

WOM1813. Engaging Male Leaders: Embracing our Differences as Professionals

Mary Bennett - Owner | MLBennett Consulting LLC

Anton Colella - Global CEO | Moore Stephens

Wendy Stevens - Partner | Mazars USA LLP

Engaging Male Leaders is a significant element in successfully achieving gender diversity. This session will explore the various ways in which panelists have engaged male leaders in their gender diversity efforts and accomplished tangible results.

Learning Objectives:

Shane Wood - Partner | Squire & Company,PC

Kassi Rushing - Director, People Growth & Engagement | Horne LLP

- Have access to individuals who have tangible experience in engaging male leaders in order to explore real scenarios.
- Learn about many different ways in which engaging male leaders may be accomplished

11/15 2:10PM-3:25PM

WOM1814. Women in the Profession Update

Yasmine El Ramly - Senior Technical Manager | Association of International Certified Professional Accountants

The accounting profession continues to evolve and the role that women play in our profession has become more relevant over the years. But the question we should be asking is whether women in leadership roles have progressed in our profession at an acceptable rate. Are women taking their place at the executive levels, and if not, how can we make that happen? We will look at the current gender trends in our profession and explore challenges and strategies to further the goal of women in leadership. Learning Objectives:

- Latest updates on state of gender diversity in the profession;
- Cover strategies to help women advance in their organization;
- Discuss opportunities to help organizations engage and retain a more diverse talent pool;
- Showcase AICPA resources that organizations and individuals can leverage from.

11/15 3:25PM-3:35PM

Change Break

11/15 3:35PM-4:25PM

WOM1815. Delegate and Elevate: Helping Your Leaders Lead By Teaching Them to Let Go

Bill Sheridan - Chief Communications Officer | Maryland Association of CPAs

If you want to take your business to the next level, your leaders need to lead. Too often, though, they're swamped with doing someone else's work. This interactive session will show you when it's time to delegate, what you should be delegating, and to whom you should be delegating it. Most important, you'll learn the secret to delegation: It's not about your time. It's about surrounding yourselves with the right people. Learning Objectives:

- Identify where their time is best spent, in terms of both their careers and their organizations
- Employ a proven process for determining which tasks are interfering with their ability to lead
- Delegate these tasks to employees who have the skills and capacity to complete them

11/15 3:35PM-4:25PM

WOM1816. I Heart Change

Sarah Elliott - Principal and Co-Founder | Intend2Lead LLC

The times...they are a changin'! Business, and the world at large, are changing faster than ever. When we can't adapt, our careers and our lives feel like more of a struggle than something to enjoy. In this session, we'll explore why change feels so hard from a physiological, mental and emotional perspective. With this understanding, we will come up with some practical ways to overcome the fear factor and learn to love change!! Learning Objectives:

- Explore why change feels so hard from a physiological, mental and emotional perspective
- Learn some practical ways to overcome the fear factor

11/15 3:35PM-4:25PM

WOM1817. Commanding the Room - How to Go from No Voice to Influencer in 7 Steps

Geni Whitehouse - Countess of Communication | Brotemarkle, Davis & Co

From our soft voices to our smaller stature, women are often at a disadvantage when it comes to being heard. In this session, you will learn how to tap in to your inner influencer and share your wisdom with authority. In this session, you will learn tools and techniques for taking command of any stage, overcoming anxiety, organizing your thoughts, and using visuals to make an impact. Learning Objectives:

- Acquire new skills for communication;
- Be empowered to speak your mind;
- Learn how to make your unique insights memorable

Friday, November 16, 2018

11/16 6:30AM-12:55PM

Registration Open

11/16 6:30AM-7:30AM

Breakfast & Vendor Displays

11/16 7:30AM-8:20AM

WOM1818. Motivation through Appreciation: Gratitude as an Engagement Tool**Rachel Druckenmiller** - *Director of Wellbeing | SIG*

Research tells us that people are less likely to express gratitude at work than anywhere else, even though they wanted to be recognized and appreciated more at work. Yet, expressing gratitude at work can have a significant impact on workplace culture and employee wellbeing. From increased job satisfaction, happiness and a sense of community to improved morale, reduced stress, and improved immunity, the impact of gratitude on well-being is far-reaching. Since we spend at least 1/3 of our waking hours at or on work, focusing on gratitude is one of the best things we could do to transform our workplaces.

Learning Objectives:

- Explain the business case for gratitude and why a culture of appreciation is critical to retention and morale
- Identify practical ways to foster a culture of appreciation at their workplace
- Differentiate between the power of bucket fillers vs. bucket dippers
- Explain the simple formula for fostering trust and connection in relationships AND reflect on their own appreciation language and understand how to communicate it and respond to others' styles to optimize communication

11/16 7:30AM-8:20AM

WOM1819. Watch your Language! Words that are Sabotaging your Career**Julie Holunga** - *Trainer & Executive Coach | Chinook Executive Solutions*

Women face issues that hinder their career progression, such as diminished confidence, not being heard, and not regarded as a leader. Julie shares one of the overlooked keys to leadership success for women: a strong vocabulary. An effective leader needs to be articulate and use robust words. Yet, women can be careless about the language they choose (like, um, sorry...) In this session, participants will learn strong vocabulary that impacts their success as a leader, and learn the obstacles that prevent their progress and impact. Leave this session knowing that

with practice, you will excel in your career by increasing your skills and confidence.

Learning Objectives:

- Remove weak language from your vocabulary and insert strong leadership language to influence and impact those around you
- Increase your confidence by taking action and speaking up!

11/16 7:30AM-8:20AM

WOM1820. Energy Escalators: Health Behaviors to Amp Up Performance!**Marcey Rader** - *Productivity and Health Champion | Work Well. Play More!® Institute*

Do you need an energy boost?
Power up your productivity, creativity, and health by learning simple ways to improve performance, power, and alertness.

Learning Objectives:

- Eliminate glute amnesia while increasing productivity, creativity, and collaboration
- Remove counterfeit energy and improve decision-making
- Effective transitions from work to home

11/16 8:20AM-8:30AM

Change Break

11/16 8:30AM-9:45AM

WOM1821. Engaging Male Leaders: Sponsorship Programs and Women's Initiatives - Best Practices

Mary Bennett - Owner | *MLBennett Consulting LLC*

Anton Colella - Global CEO | *Moore Stephens*

Wendy Stevens - Partner | *Mazars USA LLP*

Shane Wood - Partner | *Squire & Company,PC*

Kassi Rushing - Director, *People Growth & Engagement | Horne LLP*

Engaging Male Leaders is a significant element in successfully implementing gender diversity and sponsorship programs. This session will explore the various ways in which panelists have engaged male leaders in their gender diversity efforts and accomplished tangible results.

Learning Objectives:

- Have access to individuals who have successfully implemented diversity and sponsorship programs in their organizations.
- Learn about engaging male leaders to create a culture necessary for successful diversity and sponsorship programs.

11/16 8:30AM-9:45AM

WOM1822. Negotiating at Work: Strategies and Tools for Success

Jessica Porter - Gender Scholar & Consultant

Negotiating at work can help us get promotions, flexibility, buy-in, new projects, and credit for our work – in short, support for our careers. Yet people frequently underestimate their negotiation strengths and skills. This session will help you recognize your strengths and identify opportunities to negotiate, big and small. You'll learn strategies to enlist the other party in problem-solving and position yourself for success, whether you're negotiating with a colleague, a client, or your boss.

Learning Objectives:

- Understand the concept of mutual gain negotiations
- Recognize every-day opportunities to negotiate (such as for support, buy – in, resources, and opportunities)
- Understand how to position yourself for success, with information and through your approach

11/16 8:30AM-9:45AM

WOM1823. The Power of NO! How to get Rid of the Good Things in Life to Make Room for Great

Dominique Molina - President | *American Institute of Certified Tax Planners*

Did you know part of Steve Jobs' success came from saying no to 85% of Apple's product line?

In school we learn that things are either right or wrong and numbers never lie. But real life is a different story.

Entrepreneurs love to take advantage of good opportunities that come along, but sometimes those "good ideas" take up the room we need for "great ideas."

In this session discover what it takes to make these decisions easier:

- Working with Partners

- Firing People
 - Selecting ideal clients
 - Financial dilemmas
 - Knowing when to say NO makes saying YES a lot easier.
- Learning Objectives:

- How to Select Ideal Clients;
- How to Work With Difficult People (as partners or employees)
- How to Take Financial Risks

11/16 9:45AM-10:15AM

Networking Break - Refreshments & Vendor Displays

11/16 10:15AM-11:30AM

WOM1824. The Fearless Mind - Essential Steps to High Performance

Craig Manning - Owner | *The Fearless Mind*

Engineering High Performance, the NeuroScience behind outstanding performance.

Learning Objectives:

- Cognitive Control through the understanding and development of 3 critical psychological mental toughness skills
- Cognitive Ability
- Development of relevant psychological patterns - awareness of critical patterns

11/16 11:30AM-11:35AM

Change Break

11/16 11:35AM-12:25PM

WOM1825. Styling Your Way Thru Glass Ceilings: Rent the Runway's Co-Founder Gets Candid

Kacee Johnson - *Strategic Advisor for CPA.com & Founder/CEO of Blue Ocean Principles*

Jenny Fleiss is forging the way for experience economy consumers as the Co-Founder of Rent the Runway. At 37 years old, she has shattered every glass ceiling put in front of her and managed to create a unique entrepreneurial culture for women empowerment while doing it. Jenny shows entrepreneurs how to utilize resources and networks to build scalable and economically impactful

Jenny Fleiss - *Co-Founder, Rent the Runway | CEO & Co-Founder, Jetblack*

companies with the nearly \$1B women-centric organization. Catch a glimpse into how she does it all, the lessons she has learned along the way, and why no woman should ever have a closet full of clothes with nothing to wear again.

11/16 12:30PM-1:20PM

WOM1826. Debunking Common Cyber Security Myths & Lessons Learned from the Underground

Ted Ross - *CEO | SpyCloud*

Criminals that profit from account takeover (ATO) attacks have been running rampant with no concern for the consequences. But we now have the power to cause them to pause and think twice regarding taking over accounts. We will share details of the account takeover timeline, when criminals are the most effective and what you can do to protect yourself using various technologies. We will also share how this type of data can be used against criminals - to find both cyber and physical threat actors.
Learning Objectives:

- Learn best practices to protect yourself from the threat of account takeover.
- Understand limitations of common security practices and how to overcome the weaknesses.
- Discuss overall security hygiene and how to incorporate this into our daily routine