

SMITH LEONARD 2023 CPE DAY AGENDA

THE CONFERENCE CENTER AT GTCC · OCTOBER 20, 2023



7:30 - 8:00

REGISTRATION AND BREAKFAST

(Check-in at Registration Desk. Continental Breakfast in Pre Function Rooms.)

** Sponsored by Scott Insurance*

8:00 - 8:10

WELCOME AND ANNOUNCEMENTS

8:10 - 9:55

ASSURANCE, TAX, & WEALTH ADVISORY UPDATES

2023 Accounting Update for Private Companies: John Nicolson and Scotti Teschke, Smith Leonard

2023 Tax Update: Patrick Willis and Ben Duckett, Smith Leonard

Life Cycle Investing: Craig Moser, Smith Leonard Wealth Advisors

9:55 - 10:10

MORNING BREAK (Pre Function Rooms and Classrooms 130-131)

** Sponsored by Graham Personnel Services*

10:10 - 11:00

2023 Professional Ethics and Conduct

Cal Christian, College of Business, East Carolina University

Use the QR codes/links below for 2023 Professional Ethics and Conduct. Your completion of the certification link is REQUIRED to receive credit for attending the presentation.

11:05 - 11:55

Interest Rates – How High & For How Long

John Fink, David Valentiner, and Ahmed El Nokali, First National Bank

11:55 - 12:40

LUNCH (Plated Meal in Pre Function and Truist Oak Ridge Rooms)

** Sponsored by First National Bank*

12:40 - 1:30

Corporate Transparency Act

Mark Davidson, Brooks Pierce

1:30 - 2:20

Alternative Risk Solutions: How to Embrace Risk and Reward Performance

Kelly York, Greg Stancil, and Steve Heston, Scott Insurance and
Chris Colangelo and Brad Hicks

2:20 - 2:35

AFTERNOON BREAK (Assorted desserts in the Pre Function Rooms and Classrooms 130-131)

** Sponsored by TCDI*

2:35 - 3:25

No, this couldn't be done over an email. Using Humor to Improve Meetings.

Mike Cundall, Humorist, Mirth Management

3:30 - 4:20

What If Chuck Norris Taught Cybersecurity?

Steve Wujek, TCDI

4:20 - 4:25

WRAP UP AND THANK YOU

4:30 - 5:30

CPE DAY SOCIAL (Front Circle Foyer. Drink tickets in your name tag.)

** Sponsored by ADP & SL Wealth Advisors*



Use the QR code to the left to visit the 2023 CPE Day Page.

Please silence your phone during sessions. During breaks, please visit the sponsor tables in the Front Circle Foyer.

For access to the Mother's Room, please check in at the registration desk.

IMPORTANT: To ensure you receive appropriate credit, please put your evaluations, the WHITE copy of your CPE certificate, and your name tag into one of the WOVEN BASKETS in the back of the room BEFORE you leave.