

SMITH LEONARD PLLC 17th ANNUAL CPE DAY

Friday, Oct 20, 2023 · 8:10 am to 4:20 pm



EARN UP TO 8 CPE CREDITS – REGISTER HERE

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits to be granted based on a 50-minute hour.

Who should attend: All active CPAs, CFOs, Controllers, and Company Owners

Delivery Method: Group Live | **Advanced Preparation:** None

2023 Accounting Update for Private Companies | John Nicolson and Scotti Teschke – Smith Leonard

Field of Study – Accounting; Program Level - Intermediate

This private company accounting update will focus on the latest and upcoming rule changes to allow you to effectively plan for 2023 and beyond.

Prerequisites: Familiar with accounting rules and environment applicable to private companies

CPE Credit: .40 CPE Minutes: 20

2023 Tax Update | Patrick Willis and Ben Duckett – Smith Leonard

Field of Study – Taxes; Program Level - Intermediate

The 2023 Tax Update will review key updates from the latest and proposed tax legislation to enable proper tax planning from 2023 and beyond.

Prerequisites: Intermediate knowledge of tax code

CPE Credit: 1.0 CPE Minutes: 50

Life Cycle Investing | Craig Moser – Maestro Wealth

Field of Study – Finance; Program Level - Intermediate

Can I make my retirement work? How do I get what I want for as long as I want it? This course will provide insights and tools for participants to consider when planning for retirement.

Prerequisites: Basic knowledge of wealth management and financial planning

CPE Credit: .60 CPE Minutes: 30

NC Ethics: 2023 Professional Ethics and Conduct | Cal Christian

Field of Study – Behavioral Ethics; Program Level - Intermediate

NC Ethics covers current issues and special topics in ethics in the accounting profession and the current edition of the AICPA Code of Professional Conduct. Participants in this presentation will learn to define ethics in the context of being ethical versus acting ethically, identify the types of accounting services in which the fiduciary standard applies, and differentiate between rules-based, principles-based, and objectives-oriented accounting.

Prerequisites: Knowledge of AICPA Code of Professional Conduct

CPE Credit: 1 CPE Minutes: 50

Interest Rates – How High & For How Long | Ahmed El Nokali and David Valentiner – FNB

Field of Study – Economics; Program Level - Intermediate

The 2023 Economic Update will focus on current trends and economic data and on the global, national, and local economy. This presentation will enable participants to optimize business strategy.

Prerequisites: Familiar with basic macroeconomics principles

CPE Credit: 1 CPE Minutes: 50

CONTINUED

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Corporate Transparency Act | Mark Davidson – Brooks Pierce

Field of Study – Business Law; Program Level - Intermediate

The purpose of the act is to combat financial crimes, including money laundering, terrorism, human and drug trafficking and tax evasion by creating a centralized database of information about who owns and operates U.S. business entities. Learn how this important legislation will impact your business.

Prerequisites: None

Advanced Preparation: None

CPE Credit: 1 CPE Minutes: 50

Alternative Risk Solutions: How to Embrace Risk and Reward Performance | Kelly York, Greg Stancil, and Steve Heston – Scott Insurance and Panelists Chris Colangelo and Brad Hicks

Field of Study – Business Management and Organization; Program Level - Intermediate

Hear from current captive participants and Scott insurance how the group captive model is changing both the risk and health insurance landscape and how it might be a solution for your company. Participants will learn how captives allow companies to aggregate buying power, lower fixed costs, and realize potential gains.

Prerequisites: None

CPE Credit: 1 CPE Minutes: 50

No, this couldn't be done over an email. Using Humor to Improve Meetings | Michael K Cundall, Humorist – Mirth Management

Field of Study – Personal Development; Program Level – Intermediate

Humor is important for attention and memory. Our presenter will help you understand what humor is and how you can use it to make meetings more effective.

Prerequisites: None

CPE Credit: 1 CPE Minutes: 50

What if Chuck Norris Taught Cybersecurity? | Steve Wujek – TCDI

Field of Study – Information Technology; Program Level - Intermediate

All businesses are in danger of being hacked. Countries are constantly using cyber weapons to attack enemies. This presentation will teach you how to better understand the world of cybersecurity, and then, take it one step further, by teaching you how surf the web like a cyber pro. If Chuck Norris surfed the internet, then this is how he does it!

Prerequisites: None

CPE Credit: 1 CPE Minutes: 50

Conference Policies

Refunds: No refunds issued for cancellations after October 4, 2023. No refunds issued for no-shows. Participants may be substituted without any fee.

Program cancellation: If insufficient registrations are received, the event will be cancelled seven days in advance of the presentation.

Concerns: Complaints or comments should be addressed to Christine Thomson at Smith Leonard, cthomson@smith-leonard.com or 336.883.0181.

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