



USF Accounting Circle CPE Conference May 16-17, 2024

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USF Accounting Circle CPE Conference

May 16-17, 2024

Times Change – So Must We

Thursday, May 16: *In-person CPE at USF Marshall Center, followed by networking reception*

Friday, May 17: *Virtual via ON24 ~ Internet access required*

Register at www.usf.to/accounting

<i>Conference Pricing</i>	<i>Individual</i>	<i>Group (5 or more)</i>
Two-day registration (May 16 and 17)	\$425	\$400
One day only (May 16 OR May 17)	\$250	N/A

- Registration for May 16, the in-person day, includes light breakfast, lunch, and a networking reception at the conclusion of the day.
- Transfers and substitutions are not allowable. Registration after May 15, 2024 is not available.
- **Refunds and Cancellations:** Requests for refunds must be received in writing by May 9, 2024 (five business days before the conference) to receive a full refund. There is no cancellation fee. No refunds will be granted after May 9, 2024.
- For more information regarding administrative policies such as complaint and refund, please contact our offices at 813-974-4186.

Additional Information

Who Should Attend: This program is intended for CPAs who wish to remain current in various areas. Others are always welcome to attend. Descriptions and learning objectives for each presentation are included on the following program.

Program Level: Overview

Program Prerequisites: None

Advance Preparation: None

Thursday, May 16:

CPE Credit: Courses listed on the program this day qualify for up to 8 CPE credits in the categories noted for Florida CPAs. Written proof of attendance will be supplied.

Attendance Requirements: To earn a CPE credit, participants must attend 50 minutes of the session, as well as sign in and sign out.

Delivery Method: Group Live

Friday, May 17:

CPE Credit: Participants may earn up to 8 CPE credits this day only in the NASBA fields of study noted for each presentation on the following program.

Attendance Requirements: To earn a CPE credit, participants must log on, attend 50 minutes, and answer a minimum of three polling questions per 50-minute session.

Delivery Method: Group Internet Based



The University of South Florida Lynn Pippenger School of Accountancy is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its web site: www.nasbaregistry.org.

Day 1 Schedule- May 16, 2024

7:30 Conference Check-In and Light Breakfast, Marshall Center, USF Tampa

8:00-9:00

Revolutionizing Accounting Education: USF MS in Accountancy and Analytics Program Prepares Tech-Savvy Accountants *Uday Murthy, Professor, and Aharon Yoki, Assistant Professor of Instruction, USF Lynn Pippenger School of Accountancy*

As data analytics, AI, robotic process automation, and other technologies proliferate in business, is the next generation of accountants ready for this dynamic IT-driven environment? In this session, we showcase the technologies and skills infused into our revolutionary new master's program so that our graduates can turn accounting numbers into meaningful insights. (Florida CPE Category: Technical Business; 1 CPE credit)

Learning Objectives: After completing this course, you will be able to:

- List data analytics and technology skills accountants need to thrive in today's workplace.
- Identify specific tools and techniques that can help generate insights from raw data.

9:05-10:00

Leading People Within & Across the 5 Generations in the Workplace/Workforce *Debbie Lundberg, Founder & CEO, Presenting Powerfully*

With everyone from The Great Generation to Baby Boomers, Generation X, Millennials, and Gen Z in business and in meetings together, there are terrific opportunities to learn from one another, as well as chances to have discomfort, conflict, and miscommunication. This session will enable people to assess situations, needs, and appropriate responses/actions with various groups and generations while still keeping the company and business results heading in the right direction! (Florida CPE Category: Behavioral; 1 CPE credit)

Learning Objectives: After completing this course, you will be able to:

- Know who is in which generation and learn typical approaches/expectations by generation.
- Remove biases about generations by respecting through perspective and openness.
- Implement the ten tips shared for seeing, hearing, and appreciating all team members.

10:00-10:10 Break

10:10-11:05

Fireside Chat with the Chairman: The Journey to Founder and CEO *Troy Taylor, Founder, Chairman & CEO, Coca-Cola Beverages Florida*

Learn how a seasoned professional developed and maintained strategic business relationships that led to becoming the founder and CEO of one of the largest startups in the country. Investment banker and consultant to The Coca-Cola System, Troy Taylor shares the critical and intentional steps he took on his journey to become the first new bottler in the Coca-Cola system in more than 60 years. He expands the details of his journey by talking about the importance of leadership and culture. (Florida CPE Category: Behavioral; 1 CPE credit)

Learning Objectives: After completing this course, you will be able to:

- Appreciate a CEO's journey in navigating new business.
- Expand on key elements of leadership and culture to drive change in your organization.

11:10-12:05

Too Much On Your Plate? Simply Automate! *Ian Barkin, Founding Partner, 2B Ventures*

Learn about AI tools and frameworks to demystify the hype and identify the who, how, and where of applying automation to your business. (Florida CPE Category: Technical Business; 1 CPE credit)

Learning Objectives: After completing this course, you will be able to:

- Differentiate between the main types of automation technology available in the market.
- Distinguish between three main routes to sensible adoption.
- Define the four types of Enabled Citizen right for your role, function, and company.
- Initiate a learning path for those interested in becoming an AI-Powered innovator.

12:05-1:00 Lunch, Marshall Center Ballroom

Day 1 Schedule- May 16, 2024 (cont'd.)

1:00-1:55	Bridging the Gap: Understanding Tampa Bay's Economy, ALICE Trends, and the Role of Philanthropy <i>Douglas Griesenauer, VP of Community Impact, United Way Suncoast</i>
	<p>We have all heard the stories of families locally who are struggling, but how many are struggling and what can we do about it? United Way Suncoast will speak through the ALICE population (those Asset-limited, Income-Constrained, but Employed households) to discuss how many people are truly struggling in our community, the impact this has on Tampa Bay's economic landscape, and what businesses, corporate philanthropy, and individuals can do to make a positive impact. (Florida CPE Category: Technical Business; 1 CPE credit)</p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none">• Foster a greater understanding of the ALICE population and why they matter to our community.• Share actionable steps that businesses can take to make a positive impact locally.
2:00-2:55	Case Files: Fraud, Fakes and Finding the Truth <i>Andy Mintzer, Principal, Hemming Morse LLC</i>
	<p>This presentation is pulled from the intriguing case files of Andy Mintzer, where the names are altered but the lessons remain untouched. Attendees will embark on an enlightening journey through various scenarios of financial fraud and theft, examining both their successful unmasking and the instances where they slipped through the net. (Florida CPE Category: Accounting and Auditing; 1 CPE credit)</p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none">• Identify diverse methods employed in financial fraud from real-world cases.• Connect these cases to key fraud risk factors and fundamental principles of fraud detection.
2:55-3:05	Break
3:05-4:00	TPRM 101: Trends in Third-Party Risk Management and Building Out an Efficient Audit Plan <i>Sean Brennan and Liz Norton, Risk Consulting, RSM</i>
	<p>Regulators across a variety of industries are sharpening their pencils as the world tries to keep up with evolving risks of doing business with third parties. Learn how your organization can prepare for the changes ahead based on our lessons learned from the last year. (Florida CPE Category: Technical Business; 1 CPE credit)</p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none">• Recap related risk trends from 2023 and 2024.• Define high-level third-party risk management program principles.• Adequately prepare your third-party risk management audit program.
4:05-5:00	Trends in Tax Fraud <i>Spencer Macy, Special Agent, IRS Criminal Investigation</i>
	<p>This presentation will discuss the most prevalent trends and techniques that fraudsters are using to commit tax fraud. It will also cover what you can do to reduce the risk of becoming a victim of fraud. (Florida CPE Category: Technical Business; 1 CPE credit)</p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none">• Understand the mission of IRS-CI.• Identify tax fraud trends and techniques.• Identify how to reduce the chance of being a victim of tax fraud.• Understand what to do if you are a victim of tax fraud.• Identify what IRS-CI is doing to help.
5:00	END OF DAY 1 – Join us in the Ballroom for the networking reception!

Day 2 Schedule- May 17, 2024

7:45 Login to the virtual conference platform, ON24	
8:00-9:00	<p>State of the Accounting Profession: Changes, Opportunities, Challenges, and Best Practices of High Performing Firms and Leaders <i>Allan Koltin, CEO, Koltin Consulting</i></p> <p>As changes take place in the accounting profession, it is important for firms and leaders to evaluate how these changes will impact them going forward. In this session, we take a deeper dive into the best practices being used by successful firms and their leaders to produce rapid growth and profitability as well as professional growth for their associates and partners. (NASBA Field of Study: Business Management & Organization; 1 CPE credit)</p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none"> • Explain the changes taking place in the accounting profession. • List the best practices to produce rapid growth and profitability for the firm, as well as professional growth for employees.
9:05-10:00	<p>SEC and FASB Update <i>John Barbagallo, Managing Director, KPMG LLP</i></p> <p>This session will provide an overview of recent regulatory changes at the SEC and FASB standard setting hot topics (NASBA Field of Study: Accounting; 1 CPE credit)</p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none"> • Recognize the recent changes to SEC rules and regulations. • Gain insight into FASB standard setting.
10:00-10:10 Break	
10:10-11:05	<p>The Insider Threat <i>Virginia Kalil, Executive Director/Chief Internal Auditor, USF Office of Internal Audit</i></p> <p>Occupational fraud refers to frauds committed against organizations by their employees. According to the global Association of Certified Fraud Examiners' most recent <i>Report to the Nations</i>, occupational fraud is likely the most common and most costly financial crime in the world. What is your organization's risk exposure to fraud? Are you aware of your insider threat? This session will discuss the global impact of occupational fraud and how to protect against the insider threat. (NASBA Field of Study: Accounting; 1 CPE credit)</p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none"> • Summarize the global impact of fraud. • Define the three components of the fraud triangle. • Describe the most successful controls in reducing fraud loss. • Outline the key components of an organization's fraud response.
11:10-12:05	<p>Rethinking Stress: Tools and Techniques to Bring your Focus Back <i>Kristin Conklin, Americas Mindfulness Leader, Ernst & Young LLP</i></p> <p>As our workloads continue to evolve, we can benefit from a greater recognition of unhelpful states that create stress and instead employ more productive states, such as non-judgment, curiosity, and compassion. This session will increase awareness about stress states and how to apply focus toward unconscious emotions, thoughts and internal systems that affect stress reactivity. (NASBA Field of Study: Personal Development; 1 CPE credit)</p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none"> • Learn to focus intentionally to increase levels of mind and body stability and clarity. • Understand how thoughts, feelings, and body sensations create a "state of mind". • Understand stress reactivity and learn techniques to respond more deliberately.
12:05-1:00 Lunch Break	

Day 2 Schedule- May 17, 2024 (cont'd.)

1:00-1:55	Incentives – How to Move from a Cost Item to Revenue Generator <i>Bruce McCall, Attorney, Miller & Martin</i>
	<p>Whether your client or business are moving to a new location, or expanding or upgrading an existing one, cost control is paramount to maximizing ROI. One often overlooked way to achieve this is through the identification and pursuit of available local and state incentives. (NASBA Field of Study: Taxes; 1 CPE credit)</p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none"> • Research, identify, and pursue available incentives when considering decisions involving any relocation, expansion, or upgrades.
2:00-2:55	Evolution of IT Controls with Cloud Environments and Leveraging Tools for Scalable Analyses <i>Mark Molyneaux, Senior Solutions Architect, and Yoni Tamir, Solutions Architect, Amazon Ads</i>
	<p>In an evolving Information Technology (IT) landscape and with an ever-growing access to new tools and opportunities for data, we will shed light on how the industry is adapting to the new environment and share mechanisms for you to scale the transformation of data into information. (NASBA Field of Study: Information Technology; 1 CPE credit)</p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none"> • Apply Manage Change principles for Lambda (Serverless Functions). • Apply Manage Change for Serverless Compute (Serverless Containers). • Understand access in IAM (Users, Roles, Groups) and the principle of least privilege. • Build repeatable analyses using Amazon Sagemaker.
2:55-3:05 Break	
3:05-4:00	Environmental, Social, and Governance (ESG) Landscape Overview <i>Mel Dubin, Manager, and Caitlin Lanigan, Manager, Deloitte & Touche LLP</i>
	<p>This presentation will cover the evolving ESG landscape through the lens of current and emerging global regulations. Deloitte will discuss how the regulatory environment is harmonizing, how organizations are operationalizing to drive action, reliable data, and accountability across their sustainability programs, and how investor and other stakeholder expectations are evolving. (NASBA Field of Study: Accounting; 1 CPE credit)</p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none"> • List the drivers for corporate sustainability across capital markets. • Distinguish commonalities and differences across the major ESG disclosure regulations. • Consider the maturity of your organization’s sustainability governance. • Identify opportunities for enhancing your organization’s ESG data reliability to meet regulatory expectations.
4:05-5:00	Managing the Whitewater of Change <i>Jeff Outten, Chief Change Officer, FORVIS</i>
	<p>This session will aid in developing a systematic approach to change management. It is designed to provide best practices when dealing with transitions or the transformation of an organization’s goals, processes or technologies. It will provide a roadmap for strategically approaching change management in ways that encourage employee engagement and contribute to accelerated adoption. (NASBA Field of Study: Management Services; 1 CPE credit)</p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none"> • Conquer change resistance. • Maintain or increase employee engagement. • Apply the VAE process to change management.
5:00 End of Day 2 – Thank you for joining us and for your support!	

Keynote Speaker



*Troy Taylor, Founder and Chief Executive Officer,
Coca-Cola Beverages Florida, LLC (Coke Florida)*

Troy Taylor is the Founder and Chief Executive Officer of Coca-Cola Beverages Florida, LLC (Coke Florida), a family-owned Coca-Cola bottler.

Coke Florida, the sixth largest Coca-Cola bottler in the United States, sells, manufactures, warehouses, distributes, and merchandises over 600 products of The Coca-Cola Company and other partner companies. Across an exclusive Florida territory that covers 21 million consumers and includes the major metropolitan markets of Jacksonville, Miami, Orlando, and Tampa, Coke Florida operates four Green Circle Certified manufacturing facilities and eighteen sales and distribution centers. Coke Florida is headquartered in Tampa and has been recognized as the fourth largest Black-owned business in the United States.

Mr. Taylor founded Coke Florida in May 2015, becoming the first new bottler in the Coca-Cola system in over 60 years. Today, the company employs nearly 5,000 associates. Prior to establishing Coke Florida, he served as an advisor to The Coca-Cola Company for two decades and a consultant to one of its largest independent bottlers in the world. Mr. Taylor also held senior-level positions at J.P. Morgan, Accenture, and BBVA Compass.

He is also the Founder and CEO of Cardinal System Holdings, the holding company for Coca-Cola Beverages Florida, Tellus Equipment Solutions (a John Deere equipment dealer), Florida Fresh Vending and Markets (a provider of unattended retail solutions), and related private investments.

Mr. Taylor is a board member of the Coca-Cola Bottlers' Association, American Beverage Association, and Florida Chamber of Commerce. He is a former board member of the Jacksonville Branch of the Federal Reserve Bank of Atlanta and a past recipient of the EY Entrepreneur of The Year award for his founding and leadership of Coca-Cola Beverages Florida.

Mr. Taylor earned a bachelor's degree in Finance and Business Law from Marshall University.



2024 Conference Speakers



John Barbagallo, KPMG LLP

John is a managing director in the Accounting Standards Group of KPMG's National Office - Department of Professional Practice (DPP), in New York, New York with over 25 years of experience in accounting and financial reporting. John's area of expertise is leases, consolidations, and revenue recognition. John currently serves as the leader of DPP's Technical Accounting and Regulatory Presentation team, and is responsible for coordinating and delivering technical accounting and regulatory presentations to clients and targets. John's experience includes serving both public and private companies in the asset management, manufacturing, real estate, and not-for-profit industries. John also authors various DPP technical accounting publications and serves as a speaker at industry conferences, CFO Financial Forum webcasts, KPMG Government Institute, and KPMG internal trainings.

Ian Barkin, 2B Ventures

Ian is an entrepreneur, investor, and advisor with 25 years of experience in digital ops, intelligent automation, and business process outsourcing. He co-founded the pre-eminent RPA consultancy of its time and now invests in and advises tech and tech-based services firms as Founding Partner of 2B Ventures. He serves as a Bain Advisor and is on the Advisory Board of the George Mason University Intelligent Automation Initiative. Passionate about teaching, Ian co-authored the book *Intelligent Automation: Welcome to the World of Hyperautomation* and has numerous LinkedIn Learning courses on RPA and AI. His latest research on Citizen Development and Citizen Data Science was featured in Harvard Business Review and MIT Sloan Management Review.



Sean Brennan, RSM

Sean Brennan is a director of process risk consulting services at RSM with over 15 years of experience and is a licensed CPA in both Florida and Michigan. He brings a wealth of industry knowledge, specializing in risk, process improvement, and third-party risk management consulting services. His contributions span across a diverse spectrum of clients, including public sector entities and publicly traded companies, where he consistently delivers strategic insights and solutions to optimize operational efficiency and mitigate risks. With extensive expertise in accounting and compliance, Sean is recognized as a trusted advisor, leveraging his comprehensive skill set to drive organizational excellence and ensure regulatory compliance.



2024 Conference Speakers



Kristin Conklin, Ernst & Young LLP

Kristin Conklin is a certified MBSR (Mindfulness-Based Stress Reduction) instructor and serves as EY's Americas Mindfulness Leader and the Global Leader of the EY Mindfulness Network. Kristin has guided more than 35,000 colleagues and clients globally in practical mindfulness practices that enhance the employee experience toward greater wellbeing and performance. She became an advocate of mindful movement (yoga) and mindfulness meditation over 10 years ago, when she first discovered these resources as motivators of authenticity and personal growth. She is currently enrolled at the University of California, San Diego School of Medicine and holds a BA in Advertising and Public Relations. Kristin has attended and led mindfulness retreats in thirteen countries, including multiple silent meditation retreats to deepen her experience base. Kristin has a natural excitement and a life passion for energizing individuals and organizations through these practices!

Mel Dubin, Deloitte & Touche LLP

Mel has 15 years of experience building and managing sustainability programs within the investment management and real estate industries. She brings an investor's perspective to client engagements across all sectors, where she leads double materiality assessments and regulatory readiness engagements. Mel enjoys working with clients to elevate the rigor of their sustainability disclosures to withstand evolving stakeholder scrutiny and prepare for multiple overlapping ESG regulations in the US and globally. Prior to joining Deloitte, Mel worked at an asset manager where she launched a sustainable investment framework, and previously she conducted portfolio due diligence and served on limited partner advisory boards for the real estate and real asset portfolios for a state-endowed permanent fund. She received an MBA in Finance from University of New Mexico and a Masters of Strategic Leadership Towards Sustainability from Blekinge Institute of Technology in Sweden and holds the IFRS Fundamentals of Sustainability Accounting credential.



Douglas Griesenauer, United Way Suncoast

Douglas Griesenauer is the Vice President of Community Impact at United Way Suncoast. Serving his community at United Ways for the past decade and working in three different anti-poverty research centers before that, Doug is committed to ensuring that all communities have the best tools at their disposal to help families receive what they need to be successful in whatever they do. With a Masters in Social Work from Washington University in St. Louis, Doug works to connect national best practices with a local understanding of the community so that our communities can do the smartest work for their families.

2024 Conference Speakers



*Virginia Kalil, University of South Florida
Office of Internal Audit*

Virginia Kalil is a certified audit professional with over 30 years of accounting, financial, auditing, and IT experience. Currently, Virginia is the Executive Director/Chief Internal Auditor for the University of South Florida (USF) where she leads the Office of Internal Audit in their audit and investigative activities to add value and promote university leadership's stewardship, accountability, integrity, compliance, and operational efficiency.

Allan Koltin, Koltin Consulting



Highly sought for his ability to engage and inspire audiences, Allan enjoys delivering keynote addresses at conferences throughout the professional services industry. His passion is facilitating strategic planning retreats for firm leadership and partners. His specialties include strategy, governance, profitability, compensation, growth, human capital, succession, and mergers and acquisitions. For the last twenty-four years, Allan has been named by Accounting Today as one of the Top 100 Most Influential People in the accounting profession. In 2023, he was listed as the "Second Most Influential" in the profession. For the past twenty-three years, Allan was voted as one of the Most Recommended Consultants in the "Annual Survey of Firms" conducted by INSIDE Public Accounting. For the past decade, Allan has been named by CPA Practice Advisor as one of the Top 25 Thought Leaders in the profession and, in 2016, they also inducted Allan into the Accounting Hall of Fame. Allan was one of the first to be inducted into the Accounting Marketing Hall of Fame by the Association for Accounting Marketing (AAM).



Caitlin Lanigan, Deloitte & Touche LLP

Caitlin is a member of the Sustainability and ESG services team within Audit and Assurance. She specializes in working with companies to identify their most material ESG issues and to develop and implement sustainability strategies. She has experience assessing disclosure alignment to frameworks such as SASB, GRI, and the UN SDGs. She brings over 10 years of professional experience, including client services, consulting, and project management. Caitlin is pursuing her MBA with a focus on sustainability and social impact at the Quinlan School of Business at Loyola University Chicago as a Baumhart Scholar.

2024 Conference Speakers



Debbie Lundberg, Presenting Powerfully

Debbie Lundberg believes how you present is how you are remembered! Her personal brand is “Embracing & encouraging life-long kindness, growth, fun & ROI.” She is the founder & CEO of the Florida-based National firm, Presenting Powerfully, where she and her team deliver Keynotes & Talks, Strategy & Facilitation, Teaming & Training, and Coaching & Consulting. As an 11-time published author, and contributor to two other books, Debbie writes a “Dear Debbie” column for Tampa Bay Business & Wealth Magazine. She is a 2X TEDx Talk speaker, certified virtual presenter, certified life coach, certified leadership coach, and certified image consultant, in addition to co-hosting The Business Of Life Master Class Podcast.

Spencer Macy, Internal Revenue Service Criminal Investigation

Spencer is a Special Agent with Internal Revenue Service Criminal Investigation (IRS-CI). He investigates potential criminal violations of the Internal Revenue Code and related financial crimes. Over his time with IRS-CI, Spencer has investigated, among other things, tax evasion, international money-laundering, cybercrimes, and other tax refund crimes. He has participated as part of working groups with international law enforcement partners and other countries. Spencer holds several professional certifications related to the compliance, KYC, and tracing of cryptocurrency.



Bruce McCall, Miller & Martin

Bruce McCall has been practicing law for more than 35 years and has worked on projects nationwide to help clients of all sizes obtain property tax abatements and other incentives. Bruce has an understanding of the issues and questions local governments and development authorities have about the bonds for title legal procedure to provide the property tax abatements to attract new industries particularly in rural communities. Bruce has a thorough knowledge of local sales taxes, permit fees, business licenses, excise taxes, and other Economic development issues. Prior to joining Miller & Martin, Bruce has worked both in house, and early in his career with a large Atlanta law firm. He received his bachelor’s degree in public policy studies from Duke University and his Juris Doctorate from Harvard Law School.

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Andy Mintzer, Hemming Morse LLC

Licensed in both the US and Canada, Andy Mintzer's CPA career has spanned over 40 years. He is a principal at Hemming Morse LLC, providing forensic accounting services. Previously an audit partner with EY, he has served on four standard-setting bodies – Internationally he is in his sixth and final year on the International Ethics Standards Board for Accountants after serving on three US bodies of the AICPA: Professional Ethics Executive Committee (2014-18), Auditing Standards Board (2008-10), and Accounting Standards Executive Committee (2001-04). Mr. Mintzer joined AICPA's Board of Directors in 2021, having previously served on several of its committees and task forces. A former California Society of CPAs Chairman, he received a Bachelor of Arts and Master of Accountancy degrees from the University of South Florida.

Mark Molyneaux, Amazon Ads

Mark Molyneaux, a licensed CPA in Florida and USF alumnus, is a Senior Solutions Architect at Amazon Ads, where he implements technical solutions for ads measurement compliance to support attest engagements. With a background in EY's risk practice focused on ad measurement standards and experience as Oracle's Senior Compliance Officer in advertising measurement compliance, Mark blends expertise in auditing standards with a keen interest in technology driving his career beyond the traditional scope of accounting.



*Uday Murthy, University of South Florida
Lynn Pippenger School of Accountancy*

Dr. Uday Murthy is Professor and Quinn Eminent Scholar of Accounting Information Systems in the Lynn Pippenger School of Accountancy at the University of South Florida. He earned his PhD from Indiana University. He is ranked #4 nationally in research in the accounting information systems field and has published over 50 scholarly journal articles in journals such as *The Accounting Review*, *Auditing: A Journal of Practice & Theory*, *Journal of Information Systems*, and *International Journal of Accounting Information Systems*. Dr. Murthy teaches the Innovation and Analytics course in the Master of Science in Accountancy and Analytics program.



2024 Conference Speakers



Liz Norton, RSM

Liz Norton is a technology risk practitioner at RSM with over 13 years of experience in risk mitigation strategies for large, complex organizations. Her credentials include being a CPA, CISA, and having her MBA. Prior to joining RSM, Liz developed perspective serving in an advisory role for “Big 4,” and working in industry within the Internal Audit function. Liz brings expertise in internal controls over financial reporting, as well as practical knowledge of IT operational risk areas including cloud security, third-party risk management, incident response, and system implementations and integrations.

Jeff Outten, Forvis

Jeff joined FORVIS in 2018. He leads the FORVIS Change Hub, which is a team dedicated to providing oversight, guidance, and support to all major change initiatives within the organization. The goal of the Change Hub is to manage change in a way that accelerates and improves change efforts and enhances adoption and collaboration within the firm. Throughout the merger of equals between DHG and BKD to form FORVIS, Jeff partnered with the Chief Integration Officer to support FORVIS’ internal Integration Management Office by developing and executing strategic integration efforts and change management strategies with 14 dedicated workstreams. Prior to joining FORVIS, Jeff was President of an independent consulting firm, The Outten Group, Inc. His firm worked primarily with Fortune 500 companies in the areas of strategic planning, change management, leadership development and executive coaching. His experience ranges from banking to resort management, consumer goods to high-tech companies. Jeff had a long-standing relationship with FORVIS (DHG) serving in a consulting capacity for more than 15 years.



Yoni Tamir, Amazon Ads

Yoni Tamir is a USF grad who began his career in public accounting, exploring alternative ways for the accounting profession to provide value through nontraditional audits across the evolving Ad Tech industry. Now, Yoni works for Amazon Ads as a Solutions Architect where he brings his knowledge and expertise of the industry, regulations, and the audit process to achieve transparent and customer obsessed reporting. Yoni excels by acting as a translation layer between the business and engineering. He connects the compliance requirements to the technical constraints, delivering comprehensive solutions.



2024 Conference Speakers



*Aharon Yoki, University of South Florida
Lynn Pippenger School of Accountancy*

Aharon Yoki is an assistant professor of instruction at the University of South Florida Lynn Pippenger School of Accountancy. He specializes in teaching accounting analytics, and his research encompasses accounting analytics, accounting information systems, robotic process automation, and the impact of emerging technology on accounting processes and organizations. Dr. Yoki's industry and consulting background includes health care, consumer goods, government, higher education, transportation, nonprofit organizations, and financial services. Prior to his academic career, he held leadership roles in industry and spent six years in Big 4 public accounting. He is actively engaged with the profession as a member of the Institute of Management Accountants global Technology Practices and Solutions standing committee and a member of the FICPA Council, the governing body of the Florida Institute of Certified Public Accountants. He is a CPA licensed in Florida.