USF Accounting Circle CPE Conference

May 21–22, 2026

Thursday, May 21 (in-person): *USF Marshall Center, followed by networking cocktail reception*
Friday, May 22 (virtual): *ON24 conference platform (internet access required)*
Register at www.usf.to/accounting

Conference Pricing	*Individual*	*Group (5+)*
Both days (May 21 *and* 22)	$425	$400
One day only (May 21 *or* May 22)	$250	Not available

- Registration for May 21 (in-person) includes light **breakfast**, **lunch**, and networking **cocktail reception**
- Deadline to register is Wednesday, May 20
- Cancellation requests must be received by May 14 (one week before the conference) to receive a full refund; there is no cancellation fee
- Transfers and substitutions cannot be accommodated
- For more information about our registration policies, please contact our offices at (813) 974-4186

Additional Information

Who should attend: Our program is intended for CPAs who wish to remain current in various areas, though others are welcome to attend; descriptions and learning objectives for each presentation are included below
Program level: Overview
Program prerequisites: None
Advance preparation: None

Thursday, May 21 (in-person)
CPE credit: Participants may earn up to eight (8) CPE credits for this day in the categories noted for Florida CPAs; written proof of attendance will be supplied
Attendance requirements: To earn a CPE credit, participants must sign in and sign out of the session and attend for at least 50 minutes
Delivery method: Group Live

Friday, May 22 (virtual)
CPE credit: Participants may earn up to eight (8) CPE credits for this day in the NASBA fields of study noted for each presentation below
Attendance requirements: To earn a CPE credit, participants must log on to the session, attend at least 50 minutes, and answer a minimum of three (3) 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 21, 2026

7:30 am	Check-in and light breakfast (USF Marshall Center, Tampa)
8:00 am – 9:00 am	**Financial Crime Briefing** | FBI *Mark Jackson, Supervisory Special Agent*
	Florida CPE category: *Accounting & Auditing, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Identify emerging trends in white-collar and financial crimes investigated by the FBI • Recognize key indicators and red flags of fraudulent financial activity
9:05 am – 10:00 am	**Accounting Trends & Future Insight: Tariffs, Tariffs, and More Tariffs – What's Next for U.S. & Global Tax and Trade Policy** | BDO *Damon Pike, Principal & Technical Practice Leader – National Tax Office, Customs & International Trade Services*
	Florida CPE category: *Technical Business, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Understand what kind of tariffs are currently being imposed on imports into the U.S. • Explain why the U.S. Supreme Court reached the decision it did with respect to the legality of the IEEPA tariffs • Identify planning ideas that can help mitigate the impact of the various U.S. tariffs
10:00 am – 10:10 am	Break
10:10 am – 11:05 am	**Effectively Communicating Beyond the Numbers for Client ROI** | Presenting Powerfully *Debbie Lundberg, Performance & Mindset Coach*
	Florida CPE category: *Behavioral, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Speak up and speak well, even when the topic is challenging • Have important conversations without making them difficult • Present yourself and ideas powerfully in writing, online, and in person
11:10 am – 12:05 pm	**Reshaping the Accounting Profession and the Profound Change in Professional Services** Aprio *Richard Kopelman, CEO*
	Florida CPE category: *Behavioral, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Understand the structural shifts impacting talent, compliance, and service delivery in accounting • Deploy practical strategies to adapt, lead change, and create long-term value
12:05 pm – 1:00 pm	Lunch (Chick-fil-A)

Day 1 Schedule | May 21, 2026 (cont'd)

1:00 pm – 1:55 pm	**One Big Beautiful M&A(th) Test** | Bernstein *Eric Leightner, Director—Wealth Strategies* *John Flores, Vice President & Client Advisor*
	Florida CPE category: *Technical Business, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Articulate the paradigm shift in estate planning post OBBBA • Differentiate the type of tax planning more suited to your professionals in light of changing estate issues (income tax vs estate tax planning) • Identify strategies for tax savings for founders and M&A professionals, via QSBS (where appropriate) or QOF investments • Utilize charitable strategies for tax savings where appropriate
2:00 pm – 2:55 pm	**Employment Law Update** | Trenam Law *Alicia Koepke, Shareholder & Chair of Employment Law Practice Group*
	Florida CPE category: *Technical Business, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Understand recent changes to employment laws • Identify recent trends in employment-related claims and litigation
2:55 pm – 3:05 pm	Break
3:05 pm – 4:00 pm	**How Compliance Automation Is Transforming Cybersecurity and Reducing the Barrier to Entry for Emerging Companies** | Insight Assurance *Felipe Saboya, Managing Partner & Co-Founder* *Craig Saldanha, Partner of Audit Services*
	Florida CPE category: *Accounting & Auditing, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Evaluate the risks, limitations, and potential inaccuracies associated with automated control monitoring and evidence collection • Assess how automation impacts audit readiness, cybersecurity maturity, and customer trust • Determine best practices for auditors and compliance professionals when evaluating environments that rely heavily on automated tooling
4:05 pm – 5:00 pm	***Methodology Matters: A Guide for Forensic Accountants on Cryptocurrency Tracing*** *Amanda Porupski, Managing Director* | LCG Advisors *Leslie Sammis, Attorney at Law* | Sammis Law Firm, P.A.
	Florida CPE category: *Accounting & Auditing, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Apply recognized accounting principles and forensic standards to trace, quantify, and evaluate cryptocurrency transactions for use in litigation and expert testimony • Distinguish between direct evidence, inferential linkage, and speculative attribution, and determine whether a legally sufficient nexus exists between alleged victim funds and seized digital assets • Critically assess government and vendor tracing reports using proprietary software by identifying methodological flaws, unsupported assumptions, commingling errors, and analytical overreach
5:00 pm	End of Day 1 → Join us for the networking cocktail reception!

Day 2 Schedule | May 22, 2026

7:45 am	Log in to virtual conference platform (ON24)
8:00 am – 9:00 am	**Unlocking Meaningful Value in Business Transformation** | PwC *Jonathan Mejia, Director, Digital Assurance & Transparency* *Tarun Issrani, Senior Manager, Digital Assurance & Transparency*
	NASBA Field of Study: *Management Services, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Understand the drivers and landscape of transformations and the associated risks to business, technology, and controls • Gain awareness of common transformation phases and the related business considerations • Learn actionable ways to collaborate effectively amongst divisions, teams and roles to deliver sustainable value throughout the transformation lifecycle
9:05 am – 10:00 am	**What's New in Microsoft Excel** | MrExcel.com *Bill Jelen, Publisher*
	NASBA Field of Study: *Computer Software & Applications, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Use Artificial Intelligence built into Excel to solve difficult data problems • Build pivot tables that automatically refresh and format
10:00 am – 10:10 am	Break
10:10 am – 11:05 am	**Protecting the License: Florida Legislative Updates Every CPA Should Know** | FICPA *Shelly Weir, President & CEO*
	NASBA Field of Study: *Regulatory Ethics, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Identify the key legislative proposals in Florida that could impact the CPA profession, including efforts related to deregulation and changes to the CPA licensing framework • Evaluate how emerging pathways to CPA licensure may affect talent development, firm operations, and the broader CPA pipeline • Understand the FICPA's advocacy priorities and strategies for protecting the CPA license and shaping legislation that supports the profession's long-term strength and relevance
11:10 am – 12:05 pm	**Building Leaders in the Age of Overload: Turning Information Into Action That Transforms Firms** | J&S Accounting Solutions *CJ Finley, Co-Founder & COO*
	NASBA Field of Study: *Business Management & Organization, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Translate information overload into action using a simple integration framework that improves follow-through, communication, and execution inside your firm • Use AI and systems-thinking to strengthen team performance, improve workflows, and remove bottlenecks so leaders can spend more time leading and less time firefighting • Develop leadership habits that improve culture and retention, including clearer expectations, accountability rhythms, and human-centered communication strategies that elevate individual and team performance
12:05 pm – 1:00 pm	Lunch (on your own)

Day 2 Schedule | May 22, 2026 (cont'd)

1:00 pm – 1:55 pm	**SEC/Regulatory Update** | Deloitte *Val LaRochelle, Audit & Assurance Senior Manager* *Megan D'Alessandro, Audit & Assurance Senior Manager*
Deloitte.	NASBA Field of Study: *Accounting, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Understand the current SEC structure, recent rulemaking updates, and disclosure topics (including non-GAAP measures) • Recognize highlights of recent SEC staff comment letter trends • Identify recent updates from the FASB, including newly issued ASUs
2:00 pm – 2:55 pm	**Transformation Trends in Accounting** | Taylor White *Blair Greene, Business Development Director (and panelists)*
TW	NASBA Field of Study: *Management Services, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Recognize strategies for ensuring ERP implementations meet the ultimate end goal of the organization, within budget and timelines, through effective up-front planning and process optimization • Discover how companies are leveraging the Golden Triangle—People, Process and Technology—to unlock value within the organization • Understand the power of well-designed Standard Operating Procedures to reduce risk, boost efficiency, and create scalable processes that support growth
2:55 pm – 3:05 pm	Break
3:05 pm – 4:00 pm	**Tax Strategies Unlocked: Navigating the Latest Legislative Changes** | Rehmann *Ashlie Teeling, Principal, Advisory and Tax Services* *Paul Mene, Senior Manager, R&D*
Rehmann	NASBA Field of Study: *Taxes, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Understand how OBBB and other tax changes affect your organization • Apply actionable insights to identify opportunities and avoid pitfalls • Build confidence to lead with informed, strategic decisions in a rapidly changing tax landscape
4:05 pm – 5:00 pm	**Ai. Ei. O. My.: Emotional Intelligence in the Digital Age** | Work Smart Consulting *Dr. Cynthia Howard, CEO, Chief Energy Officer*
work smart consulting	NASBA Field of Study: *Personal Development, 1 CPE credit* Learning Objectives: After completing this course, you will be able to: • Recognize the destructive nature of distraction and how to activate your emotional intelligence to build and sustain relationships • Understand the benefits of authentic interactions and the value of your emotions in business
5:00 pm	End of Day 2 → Thank you for joining us and for your support!

2026 Conference Speakers | Day 1 (Thursday, May 21)

Mark Jackson, FBI

Mark Jackson is the current Supervisory Special Agent (SSA) of the White Collar Squad at FBI Tampa, overseeing investigations into financial crimes, public corruption, and civil rights. Since joining the FBI in 2003, Mark has worked on public corruption and white-collar cases in the Memphis, Los Angeles, and Kansas City Field Offices. Additionally, he served as an Assistant Legal Attaché in Kyiv, Ukraine, for two years and conducted internal security investigations at FBI Headquarters in Washington, D.C. for two years.

Damon Pike, BDO

Damon Pike founded the Customs and International Trade Services (CITS) group within the firm's International Tax practice in 2019. With 36 years of experience helping multinational companies navigate the complex rules governing the cross-border movement of goods and services, he now serves as the senior advisor for the firm's CITS team to support their mission of providing end-to-end global consulting services for all aspects of import/export planning and compliance.

Over his lengthy career, Damon has assisted clients with a vast array of customs and international trade issues. He is especially renowned for his insights in harmonizing transfer pricing policies and customs valuation requirements as part of designing in-house customs and trade compliance programs. Damon's other areas of expertise include tariff classification, country of origin determinations, free trade agreements qualification, and customs controversy matters.

Debbie Lundberg, Presenting Powerfully

Debbie Lundberg is the founder and CEO of Presenting Powerfully, a Florida-based national firm established in 2006. Combining 14 years of automotive leadership with extensive facilitation experience, she delivers keynotes, strategy, and coaching to enhance communication, leadership, and emotional intelligence. As an 11-time author, certified virtual presenter, certified life coach, certified leadership coach, and certified image consultant, Debbie writes for *Tampa Bay Business & Wealth* and co-hosts *The Business Of Life Master Class* podcast. Her notable contributions include the book *Remote Work Rockstar* and two TED Talks. A dedicated community leader, she has served with the United Way Suncoast, the American Heart Association, and the MacDill AFB Honorary Commander Board. Debbie is also a celebrated kidney donor and serves on the Tampa General Hospital Patient and Advisory Council. She holds a BA from the University of Michigan and an MBA from Edgewood College.

2026 Conference Speakers | Day 1 (Thursday, May 21)

Richard Kopelman, Aprio

Richard Kopelman is the CEO of Aprio Advisory Group, LLC, a nationally-recognized business advisory, tax and accounting firm. A driven and inspirational leader, Richard has contributed to the firm's acceleration in the profession supporting the careers of more than 2,100 professionals who serve clients in all 50 states and more than 50 countries, speaking over 60 languages.

During his tenure, Aprio has experienced significant strides in building the firm of the future, including 36 strategic mergers and acquisitions, and expanded its footprint to 31 U.S. offices and two international locations, driven by the firm's people-first and client-focused culture. Since Richard assumed the CEO role in 2013, Aprio has consistently ranked as one of the fastest-growing accounting firms in the nation, driven by a strong commitment to innovation and a forward-thinking approach. He has fostered a culture that prioritizes both professional development and enhanced client service, earning Aprio a reputation as a destination for top talent in the industry.

Richard earned a Bachelor of Science in Accounting from the University of South Florida. His community and professional affiliations include: Next Generation Manufacturing, Founder and President; Georgia's Most Admired CEO, three times; Vistage International; Rotary Club of Atlanta; AICPA and GSCPA.

Eric Leightner, Bernstein

Eric S. Leightner is a Director with Bernstein's Wealth Strategies Group, leading the Southeast and Florida practices from the Tampa office. He consults with advisors and clients on complex investment planning for high-net-worth individuals, covering the sale of businesses, executive compensation, trust and estate planning, and tax management. Recently, Eric has focused on the intersection of investment planning and non-cash passion assets, furthering Bernstein's partnership with The Fine Art Group. Prior to joining Bernstein in 2012, he was a private client manager at US Trust in New York City. Eric holds a BA in political science from UNC Chapel Hill, a graduate certificate from Oxford University, and an MBA in finance from Georgetown University.

2026 Conference Speakers | Day 1 (Thursday, May 21)

John Flores, Bernstein

John Flores is Vice President and Client Advisor at Bernstein Private Wealth Management in Tampa, Florida. He works closely with founders, entrepreneurs, and ultra-high-net-worth individuals throughout Florida's west coast. With a diverse background spanning technology, real estate, and financial services, John brings a well-rounded perspective to wealth management. He previously served as a Private Client Banker at J.P. Morgan and completed Merrill Lynch's Financial Advisor Training Program. John joined Bernstein in 2024, drawn by the firm's rigorous research culture. He holds an MBA from the University of Phoenix, a Certificate in Financial Planning & Wealth Management from the Corporate Finance Institute, and a Certificate of Specialization from Harvard Business School. Deeply committed to mentorship, John serves as a corporate mentor at the University of South Florida.

Alicia Koepke, Trenam Law

Alicia H. Koepke leads Trenam Law's Employment Law Practice Group and focuses on employment and business law litigation. She advises companies of all sizes on workplace issues, conducts investigations, and represents clients in disputes before government agencies and courts. Alicia serves on the Executive Council of the Florida Bar Labor and Employment Law Section and acts as the Section's Articles Editor. Her accolades include recognition in Best Lawyers in America, an AV Preeminent rating by Martindale-Hubbell, and inclusion in Florida Trend's Notable Women Leaders in Law. With 19 years of experience, Alicia combines advisory work with robust representation in arbitration, mediation, and state and federal litigation.

Felipe Saboya, Insight Assurance

Felipe Saboya, CPA, ISO 27001 Lead Auditor, is a Founding Partner at Insight Assurance with nine years of experience in technology risk and finance. He specializes in SOC 1, SOC 2, SOC 3, and SOC for Cybersecurity examinations, with a strong focus on organizational and business process controls. Felipe's background includes more than four years at Ernst & Young as an Accountant and multiple years at BDO supporting publicly traded companies and collaborating closely with executive leadership teams. As a licensed Florida CPA and ISO 27001 Lead Auditor, Felipe brings a balanced perspective across financial reporting, internal controls, and information security, helping clients strengthen governance and achieve sustainable compliance programs.

2026 Conference Speakers | Day 1 (Thursday, May 21)

Craig Saldanha, Insight Assurance

Craig Saldanha, CISA, CISM, CRISC, ISO LI, is a Partner of Technology Risk and Assurance at Insight Assurance. He has nearly a decade of experience in IT audit, governance, risk, and compliance, leading technology risk programs for global enterprises and high-growth organizations. Craig has served as an IT risk and compliance leader, consultant, and virtual CISO, with prior roles at RSM, Masonite, Jabil, and other firms supporting SOX, SOC, NIST, GDPR, CCPA, and broader regulatory requirements. His work spans building and maturing risk management, third-party risk, IT policy, and security governance programs, with a strong focus on operational efficiency and executive-level reporting. Craig is an active member of ISACA.

Amanda Porupski, LCG Advisors

Amanda Porupski, CPA, CVA, MAcc, is the Managing Director of Forensic Accounting & Litigation Support at LCG Advisors. Amanda specializes in forensic analysis and expert testimony involving complex financial matters across a variety of disciplines, with a focus on cryptocurrency tracing, blockchain transaction analysis, and digital asset matters. Amanda assists legal teams by evaluating and interpreting blockchain data, reviewing tracing methodologies, preparing expert reports, and testifying as an expert witness in state and federal court. She regularly presents on cryptocurrency asset tracing and digital forensics to attorneys and accountants. Amanda's practice areas also include shareholder / contract disputes, economic damages, dissolution of marriage, business valuations and appraisals, estates and trusts, fiduciary accounting, white-collar crime, and fraud investigations.

Leslie Sammis, Sammis Law Firm, P.A.

Leslie Sammis is a civil asset forfeiture attorney at the Sammis Law Firm in Tampa, Florida. She represents individuals and businesses after their high-value cryptocurrency accounts are frozen or seized for forfeiture proceedings in state or federal court. Leslie helps clients file verified claims for court action, assert innocent owner defenses, and negotiate with law enforcement agencies for the return of the frozen or seized cryptocurrency. When the agency files a complaint for forfeiture in state or federal court, Leslie represents clients through each stage of the litigation. She frequently collaborates with forensic CPAs and blockchain tracing experts to analyze financial records, evaluate the reliability of tracing methodologies, determine whether "tainted" funds can be legally connected to the targeted wallets or transaction.

2026 Conference Speakers | Day 2 (Friday, May 22)

Jonathan Mejia, PwC

Jonathan Mejia, CPA, serves as Director of Digital Assurance & Transparency at PwC. He also proudly serves as an Infantry Officer in the Florida Army National Guard, leveraging that leadership experience to enhance his role at PwC. With more than a decade at PwC across roles spanning digital assurance, risk management, and emerging technology enablement, Jonathan blends deep technical expertise with a passion for developing people, optimizing processes, and driving organizational trust. He is a global expert when it comes to risk mitigation and understanding where and how technology fits in corporate organizations. His military leadership strengthens his ability to guide teams, solve complex problems, and operate with discipline under pressure. Jonathan thrives at the intersection of people, technology, and business, continuously seeking opportunities to mentor others, build meaningful relationships, and expand his skills. He holds both bachelor's and master's degrees in Accounting from the University of South Florida, where he was an active leader within ALPFA.

Tarun Issrani, PwC

Tarun Issrani, CISA, is a Senior Manager in PwC's Digital Assurance & Transparency practice, bringing nearly a decade of experience in helping organizations navigate technology-driven risk. He specializes in strengthening trust and optimizing controls through his deep expertise in data wrangling, visualization, project management, and technology-enabled audit methodologies. Tarun holds a background in Management Information Systems and Computer Information Systems from the University of South Florida and St. John's College. Throughout his career at PwC, he has advanced by combining analytical capabilities with a people-first leadership style, successfully guiding teams through complex digital transformations. Deeply committed to mentorship and community engagement, Tarun acts on his passion for empowering others through his involvement with Delta Sigma Pi and ongoing volunteerism, helping clients and colleagues thrive in an evolving digital landscape.

Bill Jelen, MrExcel.com

Bill Jelen is the host of MrExcel.com and the author of 72 books about Microsoft Excel including Excel Gurus Gone Wild, Pivot Table Data Crunching, and Microsoft Excel Inside Out. He was an ESPN commentator for the World Excel Championships, has made over 80 guest appearances on TV's Call for Help with Leo Laporte and was voted guest of the year on the Computer America radio show.

2026 Conference Speakers | Day 2 (Friday, May 22)

Shelly Weir, FICPA

Shelly Weir serves as President & Chief Executive Officer of the Florida Institute of CPAs (FICPA), the statewide association dedicated to supporting and advancing Florida's Certified Public Accountants. She leads the organization's strategic mission to protect the CPA license, elevate the profession's influence, and enhance the professional excellence of more than 40,000 CPAs across the state. In addition, Weir plays a central role in the Institute's legislative, advocacy, and regulatory initiatives, representing the CPA profession's interests at both the state and national levels. A respected voice among peers and top industry executives, Weir's impact is unmistakable — reflected in her consecutive 2024 and 2025 selections to Accounting Today's Top 100 Most Influential People in Accounting. In her capacity as FICPA President & CEO, Weir also represents all Florida CPAs before the state's Board of Accountancy and the Department of Business & Professional Regulation. Prior to FICPA, Shelly built a two-decade career in association leadership within the hospitality sector.

CJ Finley, J&S Accounting Solutions

CJ Finley is an Austin-based entrepreneur, speaker, and the COO of J&S Accounting Solutions. He spends his days helping health and wellness entrepreneurs get their financial lives in order so they can focus on doing meaningful work instead of putting out fires. CJ also built ThriveOnLife and the ThriveOnLife Podcast to encourage purpose-driven living and co-founded the non-profit Men In The Arena to foster discipline and brotherhood through endurance challenges. Today, CJ speaks at organizations across the country on leadership, resilience, and systems thinking, challenging individuals to take ownership of their future. A graduate of Rutgers University with a degree in Industrial Engineering, CJ carries the competitive fire of a collegiate athlete into his professional endeavors, driven by a mission to help people build lives they are proud of.

Val LaRochelle, Deloitte

Val LaRochelle is an Audit & Assurance Senior Manager in Deloitte & Touche LLP's National Office Accounting and Reporting Services group and is based out of the Boston, Massachusetts office. She serves as a subject matter resource in the topics of Securities and Exchange Commission (SEC) reporting, financial statement presentation, sustainability reporting, and revenue.

2026 Conference Speakers | Day 2 (Friday, May 22)

Megan D'Alessandro, Deloitte

Megan D'Alessandro is an Audit & Assurance Senior Manager in Deloitte & Touche LLP's National Office Accounting and Reporting Services group and is based out of the Stamford, Connecticut office. She serves as a subject matter resource in the topics of Securities and Exchange Commission (SEC) reporting, financial statement presentation, and financial instruments.

Blair Greene, Taylor White

Blair Greene launched her career in financial audit with Deloitte before transitioning to private industry (with the assistance of Taylor White), where she held roles in financial reporting and controls oversight. Seeking to combine her technical experience with a passion for client service, Blair joined Taylor White in 2015. She initially worked in the permanent placement division before stepping into leadership within the transactional division. Most recently, she has focused on driving business development for executive consulting and advisory functions. Over her 10-year tenure, Blair has remained active in the community, serving on the boards of Metropolitan Ministries Ambassadors and the Tampa Bay Association for Financial Professionals. Blair earned her Bachelor of Science in Accounting from Clemson University and is a licensed CPA in North Carolina.

Ashlie Teeling, Rehmann

Ashlie Teeling is a "Bull Gator" and USF School of Accountancy alumni. Ashlie's extensive experience in advisory and tax services spans from individuals to a wide range of businesses. Prior to joining Rehmann, Ashlie was a founding partner with Teeling & Co, which combined with Rehmann in 2026 to offer an expanded level of service. She has extensive experience serving business owners, executives, and independent professionals, with a particular emphasis on guiding entrepreneurs through the life cycle of their businesses. She helps closely held businesses plan for succession or an external exit, including the estate, gift and tax consideration for multigenerational families.

2026 Conference Speakers | Day 2 (Friday, May 22)

Paul Mene, Rehmann

Paul Mene specializes in Research and Development (R&D) tax credits, conducting analyses for companies of all sizes across a wide range of industries to maximize federal and state incentives. He advises on the interaction between R&D credits and Section 174 capitalization rules, optimizing tax outcomes and ensuring compliance. A key member of the tax controversy team, Paul provides support during IRS audits and assists with energy credit benefits. Paul is an attorney who joined Rehmann in 2023 after seven years with a Big Four accounting firm, where he served clients in industries ranging from pharmaceuticals to aerospace. His practice includes representing R&D tax credit claims before the IRS and state taxing authorities.

Dr. Cynthia Howard, Work Smart Consulting

Dr. Cynthia Howard specializes in empowering leaders and teams to surpass their goals by merging Lean Six Sigma methodologies with emotional intelligence (EI), faith, and a resilient mindset. This unique combination allows her to effectively unlock potential and foster impactful leadership and teamwork. Holding a PhD in psychology and a Black Belt in Lean Six Sigma, Dr. Howard leverages her extensive experience in assessments and coaching to drive a performance-based approach. She ensures leaders are not only skilled in operational excellence but also adept at facilitating strong relationships for optimal impact. This strategy creates a dynamic and supportive environment where everyone can thrive.