



USF Accounting Circle CPE Conference

May 22-23, 2025

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USF Accounting Circle CPE Conference

May 22-23, 2025

State of the...

Thursday, May 22: *In-person CPE at USF Marshall Center, followed by networking reception*

Friday, May 23: *Virtual via ON24 ~ Internet access required*

Register at www.usf.to/accounting

Conference Pricing	<i>Individual</i>	<i>Group (5 or more)</i>
Two-day registration (May 22 and 23)	\$425	\$400
One day only (May 22 OR May 23)	\$250	N/A

- Registration for May 22, 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 21, 2025 is not available.
- **Refunds and Cancellations:** Requests for refunds must be received in writing by May 15, 2025 (five business days before the conference) to receive a full refund. There is no cancellation fee. No refunds will be granted after May 15, 2025.
- 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 22:

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 23:

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 22, 2025

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

8:00-9:00

Auditing With and Against AI

J.P. Cook, Director, and Deep Patel, Senior Manager, Protiviti

In this session, we showcase how to harness AI to improve the audit function while also exploring strategies to audit the AI systems. (Florida CPE Category: Accounting and Auditing; 1 CPE credit)

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

- Develop areas for AI usage in your audit plan.
- Deliver key AI controls necessary to audit AI.

9:05-10:00

Navigating the World of Insurance: Trends in Workers Compensation, Health Coverage, and Private Risk Management

Vera Hill, Laura Noderer, and Rich Thompson, The Baldwin Group

This presentation will take a deep dive into a vast array of insurance topics, exploring the nuances of Workers Compensation, Health Coverage and Private Risk Management. In this session, we will cover the role of wellness initiatives and the importance of E-MOD and its impact on premiums. We will also analyze health coverage funding models and best practices for controlling health plan costs. The session will conclude with a focus on the impact of social and climate related trends on homeowners, auto, and liability coverage while highlighting unique partnerships available and the importance of proactive stewardship to protect your lifestyle. (Florida CPE Category: Technical Business; 1 CPE credit)

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

- Understand the importance of Employee Wellness Programs in reducing Workers Compensation claims and effectively apply the concept of E-MOD in premium calculations.
- Identify best practices for controlling costs and promoting culture while differentiating between fully insured, level-funded, self-funded, and captive plans.
- Identify current market trends and understand their effect on the insurance market.

10:00-10:10 Break

10:10-11:05

Financial Accounting Standards Board (FASB) Update from a Private Company Council (PCC) Member

Mike Cheng, Audit Partner, Frazier & Deeter

Join us for an insightful presentation on the latest updates from the Financial Accounting Standards Board (FASB) and the Private Company Council (PCC). We will dive into key updates and discuss their impact on financial reporting under US GAAP. (Florida CPE Category: Accounting and Auditing; 1 CPE credit)

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

- Gain an understanding of the latest updates from the FASB and the PCC.
- Discuss the implications of these updates on financial reporting.
- Provide an opportunity to relay feedback to a PCC member on standards setting.

11:10-12:05

Chief Accounting Officer Perspectives and Priorities for 2025

Daniel C. Murdock, EVP, Chief Accounting Officer & Controller, Comcast Corporation

In this session, we will cover the key accounting and reporting issues that corporate controllers are focusing on, including new accounting standards and standard-setting priorities. We'll also discuss the practical implications of SEC and PCAOB regulatory updates on the preparer community. (Florida CPE Category: Accounting and Auditing; 1 CPE credit)

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

- Identify current accounting and reporting topics relating to new accounting standards.
- Analyze practical implications for companies relating to regulatory priorities.

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

Day 1 Schedule- May 22, 2025 (cont'd.)

1:00-1:55	Exponential Leadership for Driving Transformation <i>Lauren Campbell, Regional Chief of Staff, and Kayla Clogston, Associate Director & Leadership Advisor, The Siegfried Group</i>
	<p>In this session, we delve into the power of leadership as we cover Siegfried's approach to partnering with businesses nationwide. Through the sharing of tools and practical insights, we'll demonstrate how to harness the potential of Leadership Advisory to elevate your own leadership skills, drive growth within your organization, and create a ripple effect of positive change in your professional and personal spheres. <i>(Florida CPE Category: Behavioral; 1 CPE credit)</i></p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none"> • Identify the current critical finance and accounting priorities for large companies. • Utilize effective tools for strategic thinking and decision-making. • Strengthen your leadership by reflecting thoughtfully and asking the right questions to inspire change.
2:00-2:55	Shaping the Future of Accounting Trends, Opportunities, and Sustainability <i>Michael Hajek, Hajek & Hajek CPA's, PA</i>
	<p>This session is designed to inspire a deeper understanding of current trends shaping the evolution of accounting practices. It aims to equip professionals with insights needed to remain competitive in today's dynamic landscape by identifying opportunities that promote sustainability. <i>(Florida CPE Category: Technical Business; 1 CPE credit)</i></p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none"> • Recognize the opportunities presented by the evolving accounting environment. • Identify strategies that can help with demanding expectations from clients and employees.
2:55-3:05	Break
3:05-4:00	Maximizing Tax Benefits Through Qualified Plans <i>William H. Black, Jr., Pension Specialist</i>
	<p>This presentation will explain the benefits of custom-designed qualified plans for the closely-held business and professional practice. Beyond "retirement", qualified plans offer current income tax deductions, tax-deferred growth, asset protection features under ERISA, and more! <i>(Florida CPE Category: Technical Business; 1 CPE credit)</i></p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none"> • Identify the different types of qualified plans and recognize which plan is optimal for a particular client's need. • Understand client benefits beyond "retirement".
4:05-5:00	Mid-Year Economic Outlook <i>Giampiero Fuentes, VP, Economist, Raymond James</i>
	<p>This presentation will focus on Raymond James' economic outlook explained through some of the important building blocks of the US economy. <i>(Florida CPE Category: Technical Business; 1 CPE credit)</i></p> <p><u>Learning Objectives:</u> After completing this course, you will be able to:</p> <ul style="list-style-type: none"> • Explain what has happened to the US economy in recent times, and its potential path forward. • Understand the impact of fiscal and monetary policies and tariffs on the US economy.
5:00	END OF DAY 1 – Join us in the Ballroom for the networking reception!

Day 2 Schedule- May 23, 2025

7:45 Log in to the virtual conference platform, ON24	
8:00-9:00	Mastering the Numbers: Accounting's Role in Driving Financial Success <i>Kevin McGovern, CFO, United Vein & Vascular Centers</i>
	<p>Cash is king and for accounting professionals, finance is crucial because it provides the foundation for understanding how money flows through a business, enabling effective decision-making and strategic planning. In this session, we will explore how to bridge the gap between raw accounting data and actionable insights. (NASBA Field of Study: Finance; 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 how all financial statements can equip organizations with the information needed to make better decisions. • Explain how accounting helps to mitigate risks, advise stakeholders, forecast trends, and most importantly, maintain the financial health of a company.
9:05-10:00	Do More Faster with Microsoft Excel, including Power Query, Copilot, and Python <i>Bill Jelen, Publisher, MrExcel.com Publishing</i>
	<p>Join this session for a series of efficiency tips for Microsoft Excel. See new functionality including Artificial Intelligence and Python built right into Excel. Understand a new versioning system for Excel functions that will allow for improved handling of edge cases. (NASBA Field of Study: Computer Software & Applications; 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"> • Use Power Query to create repeatable data cleansing workflows. • Use Artificial Intelligence in Excel to summarize data. • Use Python in Excel for data cleaning and data visualization.
10:00-10:10 Break	
10:10-11:05	Unlocking the Power of Treasury: Why It's More Than Just Finance <i>Tracey Ferguson Knight, Co-Founder and Partner, Real Treasury</i>
	<p>Did you know that treasury is more than just a subset of finance? It's a specialized discipline with the potential to transform how businesses manage cash flow, risk, and investments. For many small- and mid-sized companies, treasury functions are scattered, but it doesn't have to be that way! Once exclusive to large corporations, treasury functions and technology are within reach for businesses of any size. (NASBA Field of Study: Specialized Knowledge; 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 how treasury functions add immediate and lasting value to your organization. • Describe when and how to introduce dedicated treasury staff to your team. • Outline cutting-edge treasury technology and trends.
11:10-12:05	State of the Profession and Regulatory Updates <i>Shelly Weir, President and CEO, Florida Institute of CPAs (FICPA)</i>
	<p>FICPA CEO & President Shelly Weir will take a deep dive inside the most pressing issues facing the CPA profession. This session will focus on some key regulatory updates, CPA licensure, major trends in the profession, and much more. (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"> • Understand key regulatory updates and corresponding impacts to CPA licensure from both a state and national perspective. • List the major trends happening across the profession in 2025.
12:05-1:00 Lunch Break	

Day 2 Schedule- May 23, 2025 (cont'd.)

1:00-1:55	Putting the “E” in ERM <i>Jacqueline Moore, Vice President, Enterprise Risk Management, Suncoast Credit Union</i>
	<p>In this session, we will stress the need to consider risks from a holistic approach, rather than individually or in silos, and the benefits of applying this approach. We will review a recent case study and understand how an effective enterprise risk management program could have resulted in a better outcome. (NASBA Field of Study: Specialized Knowledge; 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 how Enterprise Risk Management differs from traditional risk management. • Apply concepts that are key to understanding enterprise risk.
2:00-2:55	Future-Proofing the Workforce: Employee Values and Emerging Employer Trends <i>Panelists: Heather Ceresoli, Market SVP – Florida, and Kim O’Brien, Senior Principal, Moderator: Rachel Newmyer, Director of Talent, Culture, and Development, Taylor White</i>
	<p>This dynamic panel discussion will explore the future of the workforce, leveraging industry experts who will delve into what employees value and examine key trends shaping employer strategies for recruitment and retention. Using survey and real-world feedback, we will discuss actionable insights to navigate the evolving workplace landscape. (NASBA Field of Study: Personnel/Human Resources; 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 key workforce trends expected to influence employer strategies over the next 12-18 months. • Evaluate actionable strategies to align organizational priorities with evolving employee values and expectations.
2:55-3:05	Break
3:05-4:00	Federal Tax Legislative Update <i>Mark Baran, Managing Director – National Tax Office, CBIZ</i>
	<p>The U.S. Congress continues to pursue enactment of tax legislative priorities. This session will examine the scope and impact of recent federal tax legislation and policy developments. (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"> • Assess the potential effects of recent and proposed federal tax legislation on businesses and individuals. • Identify key tax provisions, planning opportunities, and potential pitfalls.
4:05-5:00	Sustainability Landscape Overview <i>Mel Dubin, Audit & Assurance Manager, Deloitte & Touche LLP</i>
	<p>This presentation will cover the evolving sustainability landscape through the lens of current and emerging global regulations. Deloitte will discuss how the regulatory environment is harmonizing, how many organizations are operationalizing to drive action, reliable data, and accountability across their sustainability programs, and how many 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 sustainability disclosure regulations. • Consider the maturity of your organization’s sustainability governance. • Identify opportunities for enhancing your organization’s sustainability data reliability to meet regulatory expectations.
5:00	End of Day 2 – Thank you for joining us and for your support!

2025 Conference Speakers



Mark Baran, CBIZ

Mark is a Managing Director in the CBIZ National Tax Office with over 25 years of tax and legal experience advising publicly traded and private companies, regulated financial institutions, investors, high-net-worth individuals, and government agencies. Based in Washington, D.C., Mark provides CBIZ stakeholders with timely insights and analysis on federal tax policy, legislative, regulatory, and judicial matters.

Prior to joining CBIZ, Mark was a Managing Director in the National Tax Office of a Big Four accounting firm. He practiced law in Washington, D.C., served as a director and senior tax counsel for a leading financial services trade association, and as a senior attorney for an independent federal agency.

William Black, Pension Specialist

William (Bill) has been in the pension administration business for over 40 years, and helps clients work toward their retirement objectives. He works with both individual and small business owners in the areas of benefits, retirement planning, and business planning. Bill and his team have the ability to offer a wide range of financial products (tax sheltered plans, mutual funds) to help his clients meet their retirement needs. He is certified through NASBA (National Association of State Boards of Accountancy) to teach continuing education to CPAs and insurance professionals. Additionally, he has had numerous articles published in national journals.



Lauren Campbell, The Siegfried Group

Lauren is a Regional Chief of Staff at The Siegfried Group. In her current role, she works with her team to support leadership development, team development, and the delivery of exceptional client service. She believes strongly in The Siegfried Group's higher purpose of helping people transform themselves into better leaders to exponentially improve their lives and works to ensure this is part of everything her team does. Prior to joining the Firm in 2021, she spent 10 years with EY in Charlotte, NC, where she worked in international tax and global supply chain planning.

Lauren currently resides in Pennsylvania after spending 15+ years in North Carolina for school (Wake Forest University), CPA licensing, and the beginning of her career. Lauren is a YoungLife leader, a Court Appointed Special Advocate (CASA) to advocate for our foster youth, and supports different nonprofits surrounding financial literacy. She is also involved in Siegfried Youth Leadership Program®, Siegfried's youth advocacy initiative.

2025 Conference Speakers



Heather Ceresoli, Taylor White

Heather launched her career in financial audit with Deloitte, advancing to audit manager, then transitioning into industry in a commercial finance & special projects capacity and was responsible for proforma modeling, strategic analysis, management & board reporting, system implementation(s) and extensive special project support. Given her passion for serving her customer, it was a natural transition for her to step into client service with Taylor White. She became the first non-founding partner of Taylor White and has expanded her role over her 19-year tenure, to include COO & Market SVP – Florida. She has continued to serve our community as a long-term board member with Goodwill Suncoast and Treasurer with Corbett Preparatory School of IDS. Heather has her BS in Accounting and a Master's in Accountancy and Management Information Systems from USF. She is a licensed CPA and completed her Six Sigma Yellow Belt.

Mike Cheng, Frazier & Deeter



Mike oversees Frazier & Deeter's professional practices related to technical accounting, where he specializes in assisting clients with complex accounting and financial reporting issues. He is currently a member of the FASB's Private Company Council (PCC), advising on possible alternatives within US GAAP to address financial statement user needs, and he recently served on the AICPA's Technical Issues Committee. Mike was previously a Senior Project Manager and PCC Coordinator at the FASB, where he led projects to simplify the accounting for non-employee share-based payments, help shape the future of the FASB technical agenda and improve VIE guidance. Formerly at a Big 4 firm, Mike has worked on the FASB's implementation team on revenue recognition (ASC Topic 606) and lease accounting (ASC Topic 842).



Kayla Clogston, The Siegfried Group

Kayla leads Siegfried's Florida market in the Tampa Bay area, focusing on cultivating lasting relationships and delivering value to financial executives and companies. As an Associate Director and Leadership advisor, she guides her clients in prioritizing their goals, both personally and professionally, enabling them to effectively lead and execute strategic accounting and finance projects. Beginning her journey at Siegfried as a Professional Resource in the Boston market, Kayla provided direct assistance to a variety of Fortune 1000 companies. It was during one of these assignments that she found herself in Florida, ultimately deciding to make it her home, and shift into her current role at the Firm.

Originally from Massachusetts, Kayla attended UMass Amherst, earned her CPA license, and started her career at EY's Boston office in Assurance.

2025 Conference Speakers



J.P. Cook, Protiviti

J.P. is a Director in Protiviti's Internal Audit practice in Tampa, FL with over 15 years of Protiviti work experience. During his tenure he has worked in both 2nd and 3rd lines of defense with a focus on SOX, Operational Audits and Compliance. J.P. has worked in many facets of IT Internal Controls, gaining experience not only performing the day-to-day tasks but also overseeing large, multiple year engagements for both domestic and international companies. J.P. has an affinity for expanding his auditing skills and has joined the AI journey.

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 serving clients who want to elevate the rigor of their sustainability disclosures to withstand evolving stakeholder scrutiny and prepare for multiple overlapping sustainability regulations in the US and globally. Prior to joining Deloitte & Touche LLP, Mel worked as 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.



Giampiero Fuentes, Raymond James

Giampiero joined Raymond James in 2017 and he's currently the firm's economist after spending most of his tenure at the firm as an Investment Strategy manager. His role focuses on researching economic trends, building economic models, and providing advisors and clients with in-depth guidance regarding the economy and markets. Giampiero received his Bachelor's in Finance at the University of South Florida where he was awarded the King O'Neal Scholar Award and was nominated as the most remarkable student in the 2013-2014 academic year. In 2018 he obtained his Master's degree in Finance with honors from Harvard University.

2025 Conference Speakers



Mike Hajek, Hajek & Hajek, CPA's, PA

Mike is a CPA and a graduate of USF. Hajek & Hajek CPA's PA has focused on assisting business owners with common challenges of accounting, budgeting, and taxation, and also providing support for long-term business planning such as expansion and exit planning. In 2000, the firm developed a customizable part-time CFO service to advise and consult owners on the day-to-day operations and challenges of their business. Mike has served as the Instructor for the St. Petersburg Chamber of Commerce's "Entrepreneurial Academy", acted as the Past Club President for the St. Petersburg West Rotary, and was awarded the Chamber Member of the Year. Most recently Mr. Hajek was appointed Treasurer for the Boys & Girls Clubs of the Suncoast. Mr. Hajek is the President of the Hajek Family Foundation, a not for profit dedicated to providing Financial Education. In addition, Mr. Hajek is a supporter of the American Cancer Society, Eckerd Connects, and Casa Pinellas.

Vera Hill, The Baldwin Group

Vera has been a licensed adjuster since 2014. She was born in Lima, Peru and graduated from the University of South Florida with a degree in Psychology. Vera was introduced to the world of insurance by a friend who was a workers compensation adjuster at Liberty Mutual Insurance. There she learned the ins and outs of adjusting. She then wanted to further her knowledge of insurance and in 2019 joined the Claims Advocacy Team at The Baldwin Group and it was all history from there. She is now a Sr. Claims Manager that handles claims and leads colleagues.



Bill Jelen, MrExcel.com

Bill is the host of MrExcel.com and the author of 69 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.

2025 Conference Speakers



Tracey Knight, Real Treasury

With over 30 years of FinTech experience, Tracey has worked with thousands of companies engaged in selecting and implementing technology to transform their treasury and finance departments. Experienced as a practitioner, a vendor, and a consultant, she brings a unique combination of knowledge and skills to truly understand a company's current state, and guide them to an automated, innovative, and more strategic future state. A partner at Real Treasury, Tracey focuses on helping treasurers and "pre-treasury" CFOs avoid the mistakes and turmoil that often accompany technology selection. With the help of Real Treasury, companies get the fantastic results and value that cash management and treasury technology provide. She has a BS in Economics from the Wharton School at the University of Pennsylvania and is a popular and frequent speaker at local, regional, and national Association of Financial Professional (AFP) events.

Kevin McGovern, United Vein & Vascular Centers



Kevin is a senior financial executive with over 30 years of Finance and Accounting leadership experience. He currently is the CFO of United Vein & Vascular Centers (UVVC), one of the largest PE backed multi-site vein platforms in the United States. Prior to UVVC, Kevin was the CFO of InBloom Autism Services, a PE-Backed company which provided care for children on the autistic spectrum and the Vice President of Finance with Mednax (now Pediatrix), a publicly traded national medical group and the largest Neonatology company in the United States. Kevin began his career at Ryder, a publicly traded Transportation and Logistics company, where he was responsible for SEC reporting and the corporate consolidation. Throughout his career, Kevin has spearheaded several key strategy and growth initiatives, most notably at Mednax, where he helped grow the company from \$1.8B to \$3.5B in revenue in 5 years; and UVVC, which last year opened 14 new clinics in 4 states and completed its first acquisition. Kevin holds a bachelor's degree from the University of Florida, and an MBA from Florida International University (FIU).



Jacqueline Moore, Suncoast Credit Union

Jacqueline began her career in the financial industry over 30 years ago, serving in a wide range of roles, including both front-office and back-office positions, as well as spending a few years as a Compliance Examiner with the FDIC. This breadth of experience prepared her for the enterprise risk management positions she has held for the last 15 years. She has been the Chief Risk Officer for two local financial institutions and is now the Vice President of ERM with Suncoast Credit Union, working to develop the ERM program of this \$18 billion institution.

2025 Conference Speakers



Dan Murdock, Comcast

Dan serves as Executive Vice President, Chief Accounting Officer and Controller of Comcast Corporation. In this role, he leads the company's financial reporting, accounting, and related internal controls functions. Since joining Comcast in 2015, Dan has also served as Vice President and Corporate Controller. Prior to Comcast, he was with the U.S. Securities and Exchange Commission where he served as the Deputy Chief Accountant in the agency's Office of the Chief Accountant since 2013. Before that, he was Deloitte & Touche's Audit/Industry Professional Practice Director for media and entertainment. Dan earned a BS in accounting from the USF, is a CPA, and is a member of the American Institute of Certified Public Accountants.

Rachel Newmyer, Taylor White

Rachel began in public accounting, where she developed a broad skillset in audit, tax, and write-up services for small to mid-sized businesses. She then transitioned to industry, gaining valuable finance and accounting experience in both the transportation and pet services sectors. Rachel was eager to join Taylor White to utilize her diverse accounting background in a different way and find fulfillment in changing people's lives in a positive way. After initially specializing in permanent placement for the TW division, she leveraged her management skills to build and lead a sourcing team, driving significant growth in the candidate pipeline. Currently, Rachel's role centers on the critical areas of internal talent acquisition, employee development, and fostering a positive and productive organizational culture, demonstrating her commitment to building and nurturing a high-performing workforce. Rachel holds a Bachelor of Science in Business Administration in Accounting from the University of Southern Mississippi and is a CPA. She also serves on the Metropolitan Ministries Ambassador Board.



Laura Noderer, The Baldwin Group

Laura comes with over 23 years of direct client experience, specifically over 9 years in the private risk management of successful individuals and families, with intricate private insurance needs. Laura joined The Baldwin Group (at that time, BKS Partners) in 2015 and has since gained the elite designation of Certified Personal Risk Management (CPRM) that addresses the insurance and risk management services that are available to affluent and ultra-affluent individuals and families. She has been awarded the 2022 Insurance Journal Agents of the Year award, as an acknowledged expert in the insurance industry.

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Kim O'Brien, Taylor White

Kim began her career in audit for public accounting firms, spanning local, regional and national reach. She transitioned out of public as an Audit Manager with Grant Thornton to accept a CFO position with a large not-for-profit healthcare organization in Tampa. During her three-year tenure, she focused on developing strategic management reporting, optimizing financial policies and internal controls, implementing systems, and instituting a 401(k) plan. As a result of her efforts, she was recognized as 2008 CFO of the Year in the Not-for-Profit category by the Tampa Bay Business Journal. Joining Taylor White in 2008, her foundational experience enabled her to support a broad client profile, while also providing the highest level of service to her candidates. She has advanced to Senior Principal with Taylor White over her 17-year tenure, supporting both traditional permanent placement, as well as consulting services.

Deep Patel, Protiviti

Deep is an experienced professional with over 8 years of experience specializing in Information Technology Audit, Risk, and Governance. Throughout the career, Deep has collaborated with diverse industries, assisting organizations in managing IT-related risks and ensuring compliance with industry standards. Deep's expertise includes evaluating and enhancing IT processes, conducting system audits, and offering strategic guidance for mitigating enterprise risk. Deep is dedicated to continuous professional growth and staying ahead of emerging trends in the dynamic IT landscape.



Rich Thompson, The Baldwin Group

Rich helps companies optimize insurance programs by balancing coverage, cost, and administration through a proactive strategic plan and industry leading client resources. Rich studied accounting at USF and attributes this foundation to his success as a CPA and Big 4 auditor, before moving into insurance. Rich provides his clients with a partner who has a strong business acumen and perspective to help align insurance program architecture to company goals. He is committed to being an industry leader with several credentials, including Certified Employee Benefit Specialist (CEBS) and Certified Self-Funding Specialist (CSFS).

2025 Conference Speakers



Shelly Weir, Florida Institute of CPAs (FICPA)

Shelly is President & Chief Executive Officer of the Florida Institute of CPAs (FICPA), the statewide professional association for Certified Public Accountants (CPAs) in Florida. In this role, Weir serves as Secretary-Treasurer of the FICPA and FICPA Scholarship Foundation and works in partnership with the FICPA Council to develop and execute the Institute's strategic vision.

Weir is actively engaged in legislative and advocacy efforts representing the CPA profession at the state and national level. As a member of the Board of Trustees for the Florida Chamber Foundation, she advocates for the business and tax interests of CPAs. As President & CEO, Weir represents all Florida CPAs with the state's Board of Accountancy and the Department of Business & Professional Regulation. As a member of the CPA Society of Association Executives, she collaborates with other association leaders to address regulatory and legislative agendas affecting CPAs across the nation.