

Schedule at a glance

AC Accounting
EC Economics
IT Information Technology
MS Management Services
TX Taxes

Financial Institutions Conference

Details

Date: August 28, 2019

Time: 8:00 am – 4:10 pm
(registration begins at 7:30 am)

Product #53042 **Webcast** #53044

Location:

The Ohio Society of CPAs
4249 Easton Way, Suite 150
Columbus, OH 43219

Registration

Full Name _____

Society ID/Email* _____

Business Name _____

Business Address _____

City _____

State _____ Zip _____ Fax _____

Phone _____ After Hours Phone _____

Special Needs _____

Course confirmations will be sent via email. In the event the Society does not have an email address for you on file, confirmation will be mailed USPS.

Registration Options

| | |
|---|--|
| <input type="checkbox"/> Regular \$554 | <input type="checkbox"/> Member \$399 |
| Save \$50 when you register before July 31 at the early member discount rate! | |
| <input type="checkbox"/> Early discount \$504* | <input type="checkbox"/> Early member discount \$349* |

Select Sessions

| | | | |
|---------------------|----------------------------|----------------|----------------------------|
| 8:00 – 9:30 am | <input type="checkbox"/> 1 | 1:00 – 2:30 pm | <input type="checkbox"/> 4 |
| 9:45 – 10:45 am | <input type="checkbox"/> 2 | 2:40 – 4:10 pm | <input type="checkbox"/> 5 |
| 11:00 am – 12:15 pm | <input type="checkbox"/> 3 | | |

Payment Information



ONLINE

To register and pay online, visit www.ohiocpa.com/FIC19

OR



MAIL

Return this form no later than July 31, 2019 with a check made payable to The Ohio Society of CPAs to:

The Ohio Society of CPAs
4249 Easton Way
Suite 150
Columbus, OH 43219

Want to become a member of OSCPA? Find out how you can register for this event at the member rate and save \$155 instantly, plus have access to other OSCPA member benefits. Call the Member Service Center at 614.764.2727 for more information.

| | |
|---------------------|---|
| 7:30 - 8:00 am | Registration and Continental Breakfast |
| 8:00 - 9:30 am | <p>1. Impact of Cryptocurrency and Blockchain on the Financial Services Industry IT</p> <p><i>Sean Smith, assistant professor, Lehman College</i></p> <ul style="list-style-type: none"> Analyze and examine emerging topics and trends in both the blockchain and cryptocurrency space. Discuss the implications connected to emerging topics such as the lightning network and stablecoins. Identify resources and information to remain up to date on the fast changing blockchain and cryptocurrency ecosystems. |
| 9:30 - 9:45 am | Networking break |
| 9:45 - 10:45 am | <p>2. Federal and State Tax Landscape TX</p> <p><i>Chuck Marston, CPA, MST, president, director of tax group, S R Snodgrass</i></p> <ul style="list-style-type: none"> Dissect the Tax Cuts and Jobs Act's most relevant provisions and how they affect financial service companies. Review compliance guidance at the state level. Pinpoint key takeaways to better position your company for the next filing season. |
| 10:45 - 11:00 am | Networking break |
| 11:00 am - 12:15 pm | <p>3. Update on the Regulatory Environment MS</p> <p><i>Douglas Barr, national bank examiner/team leader, Office of the Comptroller of Currency</i> <i>Julie Blake, CFA, risk officer, midsize bank supervision, Office of the Comptroller of Currency</i></p> <ul style="list-style-type: none"> Review financial performance and key indicators for community and midsize financial institutions. Discuss trends in the overall risk environment. Analyze key regulatory developments requiring attention and examine affect on strategies, credit and compliance. |
| 12:15 - 1:00 pm | Lunch |
| 1:00 - 2:30 pm | <p>4. Mastering the CECL Standard and Future Reporting Changes AC</p> <p><i>Ian McDowell, CPA, assurance principal, S R Snodgrass</i></p> <ul style="list-style-type: none"> Understand the implications of the new accounting standard and how it impacts financial reporting, including disclosures, and performance. Identify best practices to implement the standard and explore how the new standard will change business processes. Pinpoint future financial reporting issues. |
| 2:30 - 2:40 pm | Networking break |
| 2:40 - 4:10 pm | <p>5. Industry Outlook: The Road Ahead EC IT MS</p> <p><i>Moderator: Jason Painley, CPA, CRMA, MBA, senior vice president & chief risk officer, Mechanics Bank</i> <i>Panelist: Dan Martin, chief executive officer, Innovest Global, Inc.</i> <i>Panelist: Brandon Fabris, vice president, Cost Sharing Solutions, LLC</i></p> <ul style="list-style-type: none"> Examine the most important issues facing the financial service industry such as; global events, security risk and future workforce. Explore the industry's digital transformation and the power of data and technologies driving competitive growth. Delve into trends in merger and acquisitions as institutions look to consolidate their position or step away from non-core activities. |