



What's Next For Business?

RESILIENCE THROUGH RECOVERY

2020 BDO USA, LLP VIRTUAL CONFERENCE

DECEMBER 16-17, 2020





Welcome to Our Virtual Forum

Please join BDO Leaders and Keynote speakers for **What's Next for Business? Resilience through Recovery** as we explore topics from economic impacts to optimizing cash flow, supply chain strategies to evolving regulations, reimagining work to balancing risk and innovation. This two-day virtual event combines general sessions with technical and industry breakouts focused on the issues that matter most in today's climate.

Now is the time to look forward, anticipating and adapting to the forces of change shaping the new reality. By focusing on building long-term resilience, businesses can emerge from the crisis and return not just to business as usual— but to better than usual.

WHY ATTEND?

- ▶ Main Stage topics focus on What's Next for Business: 2021 outlook, business resilience scenarios, C-suite perspectives, the global value chain, innovation and digital transformation, supporting your workforce, and what's next for leaders.
- ▶ Technical breakouts focus on audit, accounting, tax updates and current business and industry issues.
- ▶ Live Q&A with business and industry leaders.
- ▶ Pop-in lounges for topical discussions.
- ▶ Attendees can earn up to 9.5 CPE credits in various fields of study during the two-day session.

WHO SHOULD ATTEND?

BDO clients and invited guests. The online program will appeal to a variety of C-Suite and technical, finance, and business professionals. We welcome all invited guests to experience the valuable insights and technical updates that BDO Leaders, Specialists, and Keynote Speakers will provide.

Registration Information

CLICK TO REGISTER FOR THE 2020 BDO USA CONFERENCE

- ▶ There is no deadline to register, but you do need to sign up through our registration process to gain access to the online conference.
- ▶ The following pages showcase our agenda, including dates, times, speakers, session overviews, and CPE credit and fields of study. In addition to joining our Keynote and General Sessions, you can select the most relevant breakout sessions that you wish to attend.
- ▶ As a convenience, there are calendar links to save your selections to your Outlook calendar in advance. Or you can log in during the conference and build your agenda as you go. Your selections can be changed, up until the start of each session.
- ▶ We spaced session starts to allow for periodic breaks and will begin and end each session promptly as scheduled.

Please note that CPE credit is estimated to be 1.0 credit for each 50-minute session and 1.5 credits for the 75-minute session on Day 2. CPE credit is not available for the daily welcome and opening remarks or pop-in lounge breakout discussions.

SCHEDULE OF EVENTS

Please note all times listed in this brochure are in Eastern Time (ET).

Wednesday, December 16

| | |
|---------------------|---------------------------------|
| 9:00 am - 11:00 am | Virtual Conference Center Opens |
| 11:00 am - 11:15 am | Opening Remarks |
| 11:15 am - 12:05 pm | Keynote: General Session |
| 12:15 pm - 1:05 pm | General Session |
| 1:05 pm - 1:30 pm | Break |
| 1:30 pm - 2:00 pm | Pop-in Lounge Discussions |
| 2:10 pm - 3:00 pm | Technical & Industry Breakouts |
| 3:10 pm - 4:00 pm | Technical & Industry Breakouts |
| 4:10 pm - 5:00 pm | General Session |

Thursday, December 17

| | |
|---------------------|---------------------------------|
| 10:00 am - 11:00 am | Virtual Conference Center Opens |
| 11:00 am - 11:40 am | Opening Remarks |
| 11:40 am - 12:30 pm | General Session |
| 12:40 pm - 1:30 pm | Innovation Lab: Breakouts |
| 1:30 pm - 1:45 pm | Break |
| 1:45 pm - 3:00 pm | Keynote: General Session |
| 3:10 pm - 4:00 pm | General Session |



> What's Next For Business?

Detailed Agenda



DAY 1

Wednesday, December 16

11:00 - 11:15 AM Eastern Time

Welcome and Opening Remarks: What's Next for the Middle Market[Add session to calendar](#)

If there was ever a time that demanded the question “What’s Next?” it is now. In these unprecedented times, we are together defining what’s next for our people, what’s next for our communities, and what’s next for our businesses. Join BDO USA CEO Wayne Berson in kicking off our two-day event as he discusses what’s next for the middle market and highlights business issues, emerging trends and insights we will be exploring throughout our virtual conversation.

Non-CPE Session

11:15 AM - 12:05 PM Eastern Time

What's Next for Business: Outlook 2021 Understanding the Economic Impacts[Add session to calendar](#)

Join Natalie Kotlyar, BDO Partner and Incoming Industry Group Leader with Keynote Speaker, Thomas Kennedy, Global Head of Macro and Fixed Income Strategy at J.P. Morgan Wealth Management as they discuss pre-COVID-19, the U.S. Federal Reserve projected that GDP growth would remain relatively steady through 2022, with unemployment rates staying below the 6.7% target and inflation remaining stable. More recent economic forecasts paint a more challenging picture. In the near term, as the health and economic implications of the pandemic continue to evolve, businesses of all sizes and across all industries will continue to feel a significant impact.

After this program attendees will be able to:

- ▶ Understand how COVID-19 impacted the nation's economic outlook
- ▶ Identify drivers of growth and decline in the economy
- ▶ Identify the role potential stimulus could play in the nation's economic outlook

CPE 1.0 Credit / Field of Study: Technical EC - Economics

12:15 - 1:05 PM Eastern Time

What's Next for Business: Resilience Agenda[Add session to calendar](#)

Join moderator, Matthew Becker, National Managing Partner of Tax and panelists, Eskander Yavar, BDO's Global Value Chain Solutions Lead Partner and Manufacturing Practice Leader; Val Laufenberg, Partner, Management Advisory Services; Jim Loughlin, Managing Director, Business Restructuring Services; John Krupar, Managing Director, Operational Value Creation; and Sean Murphy, Managing Director, Forensic Investigation Litigation Services.

For many businesses, 2020 has been a crash course in crisis management—a test of leadership few had prepared for and even fewer saw coming. And companies continue to grapple with tough questions and tough choices. But businesses cannot perform in crisis mode in perpetuity.

Now is the time to look forward to what's next, anticipate how the forces of change will shape the new reality, and adapt. Business resilience is crucial for organizations to survive in this ever-changing environment. In this panel, we will review the diverse business scenarios an organization may face and discuss strategies to mitigate the challenges they create.

Top considerations include:

- ▶ Operational restructuring in a distressed situation
- ▶ Risk management in a complex and non-linear environment
- ▶ Re-engineering to uncover capital to fund growth and productivity enhancing technology
- ▶ Defining a robust business strategy using the right tools
- ▶ Pivoting your business model to remain agile in times of change

After this program attendees will be able to:

- ▶ Discuss why defining a business strategy is particularly important in today's environment
- ▶ Analyze a company's process to understand the tools and techniques that add efficiencies to the process
- ▶ Assess three key areas leadership must enhance to make their organizations more resilient through their risk management programs
- ▶ Demonstrate the importance of liquidity management
- ▶ Compare the differences various industries faced at the beginning of the pandemic and economic downturn

CPE 1.0 Credit / Field of Study: Technical FI - Finance

DAY 1

Wednesday, December 16

1:30 - 2:00 PM Eastern Time

Regional Pop-in Lounge Discussions

Join BDO regional leaders and special guests for live targeted discussions - share what's top of mind, explore what lies ahead, and discuss how we can best navigate the uncertainties and opportunities ahead.

Non-CPE Sessions

Breakout Option 1: What's Next for the Atlantic Region: Business Leader Perspectives

[Add session to calendar](#)

Join Mark Ellenbogen, Atlantic Assurance Regional Managing Partner, and Brian Collins, Director, FILS Insurance Risk Recovery, for an interactive discussion on business continuity planning and how companies can adapt over the next 12-24 months.

Breakout Option 2: What's Next for Risk Management: Rethinking Crisis Management, Business Continuity, and Third-Party Risk

[Add session to calendar](#)

It's a new era of complex local, regional and global change, fraught with uncertainty and risk – but also new possibilities. Disruption can be turned from threat to opportunity – if organizations are agile enough to seize it. Join Central Region participants for a discussion with Jeremy Stynes and Sean Murphy from BDO's Crisis Management and Business Continuity practice to discuss how rewiring the way we think about risk can contribute to a culture of resilience and agility.

Breakout Option 3: What's Next for Work? Trends and Impacts on Commercial Real Estate in the Northeast

[Add session to calendar](#)

Join Tom Stringer, BDO NY-Metro Corporate Real Estate Advisory Services Managing Director, Mat DeMong, Tax Regional Managing Partner, and Demetrios Frangiskatos, Audit Regional Managing Partner, for an interactive overview of predictions affecting the Northeast US downtown and suburban office hubs as companies navigate short-and-longer term real estate needs. Mr. Stringer leads BDO's Site Selections & Incentives team and is frequently consulted by government economic development and elected officials as well as media outlets. He is also a licensed attorney and corporate real estate broker in New York.

Breakout Option 4: What's Next for the Southeast Region: Pandemic Impacts and Economic Outlook

[Add session to calendar](#)

Join Mike Musick and Karen Stone, Southeast Managing Partners and Tom Cunningham, Senior Vice President and Chief Economist of the Metro Atlanta Chamber and former Senior Economist for the Federal Reserve Bank of Atlanta, for an outlook on the economy of the Southeast including pandemic impacts and population migration trends.

Breakout Option 5: What's Next for the Southwest Region: Thriving in 2021 and Beyond

[Add session to calendar](#)

Join Ron Martin and Steve Albert, Southwest Managing Partners and guest economist Josh Pherigo for an outlook on the economy of the Southwest including pandemic impacts and population migration trends from various industry perspectives.

Breakout Option 6: What's Next for Leading with Impact - across stakeholders

[Add session to calendar](#)

Join west region BDO leaders and special guest, Lisa Stevens, Aon's Chief People Officer to learn more about the importance of culture strategy in propelling growth, delivering business results, and recruiting, retaining and engaging top professionals in the "next" normal.

DAY 1

Wednesday, December 16

2:10 - 3:00 PM Eastern Time

What's Next for Managing Your Business - Part 1 Breakouts

Breakout Option #1 - Tax Relief Strategies for Resilience: Understanding the Opportunities Afforded by Recent Legislation and Planning for Perseverance

[Add session to calendar](#)

Businesses contending with the impacts of the COVID-19 pandemic and its economic implications will benefit from recognizing the critical role of the tax function in resiliency planning. Regardless of your company's size, location or industry, there are tax relief strategies that can help now and when planning for the future of your business. Join Randy Schwartzman, BDO's Corporate Tax Technical Practice Leader, Connie Cunningham, Tax Managing Director, and Joe Caliano, International Technical Tax Practice Leader, for insights relating to the Persevere and Maintain phases of BDO's Resilience Framework, including creative tax planning techniques designed to take advantage of relief provisions contained in the CARES Act and other governmental COVID-19 relief incentives. Choice of entity options and changes to the international tax environment including controlled foreign corporations will also be discussed.

After this program participants will be able to:

- ▶ Identify tax relief strategies created by recent legislation that align with the Persevere and Maintain phases of the resiliency cycle
- ▶ Review reliable/proven tax planning strategies for businesses, including flow-through entities such as sole proprietorships, partnerships, and S corporations, as well as tax strategies for stand-alone C corporations, and consolidated returns groups
- ▶ Analyze choice of entity options considering current and future tax law changes for newly formed or existing entities
- ▶ Discuss changes to the international tax environment, including tax provisions involving controlled foreign corporations

CPE 1.0 Credit / Field of Study: Technical TX - Taxes

Breakout Option #2 - Understanding the SPAC Process from IPO to De-SPAC Transaction

[Add session to calendar](#)

Special Purpose Acquisition Companies, or SPACs, have seen a resurgence in popularity since becoming all but extinct after the 2007-2008 financial crisis. These publicly traded companies are formed with the sole purpose of raising capital to acquire one or more unspecified businesses. The SPAC IPO process along with the De-SPAC transaction are highly regulated and complex transactions that require experience and intensive preparation - please join Mike Stevenson, National Assurance Partner, Rob Trinchetto, Audit Partner, and Matt Coker, Accounting & Reporting Advisory Director, in this session as they demystify the process for companies looking to go public.

After this program participants will be able to:

- ▶ Outline the roadmap of a SPAC from the IPO process through the De-SPAC transaction
- ▶ Understand accounting nuances to keep in mind when going through the SPAC process
- ▶ Discuss how target companies can prepare for a transaction through a SPAC

CPE 1.0 Credit / Field of Study: Technical AC - Accounting

Breakout Option #3 - Unlocking Your Success Through Digital Transformation: Learnings from the Mid-market

[Add session to calendar](#)

Digital transformation is central to business transformation. Join our Digital Transformation and Management Advisory Services Professionals Chip Cohron, Ian Cooper, and John Kincher as they highlight key C-suite data findings from our 2020 Digital Transformation survey, including the evolving role of the finance function in leading these transformations. Leveraging our 3+1 methodology, we'll help define the four main aspects of transformations centered on strategy, process, infrastructure, and adoption. We'll also discuss who needs to be part of Digital Transformation from the organization and key focus areas in building a Digital Transformation roadmap.

After this program participants will be able to:

- ▶ Explain the components needed for a successful business transformation
- ▶ Identify how to measure the return on digital investment
- ▶ Demonstrate knowledge of emerging technologies and use cases

CPE 1.0 Credit / Field of Study: Technical IT - Information Technology

DAY 1

Wednesday, December 16

2:10 - 3:00 PM Eastern Time

What's Next for Managing Your Business - Part 1 Breakouts**Breakout Option #4 - Black Swans and Grey Rhinos Risk Management**[Add session to calendar](#)

In this session, BDO Professionals Jerome Ryan, Vicky Gregorcyk, and Karen Schuler will explore the topic of Black Swans and Grey Rhinos and the risk management approach to each. Additionally, we take a deeper dive into the current pandemic to explore how this compares to past pandemics and how companies can begin to reintroduce employees to worksites and conclude with thoughts on "What's Next" and ways companies can prepare for the next Black Swan or Grey Rhino.

After this program participants will be able to:

- ▶ Explore differences between Black Swans & Grey Rhinos
- ▶ Align to national guidance on returning to work
- ▶ Mitigate unforeseen risk
- ▶ Build a Return to Work Plan and prepare for what's next

CPE 1.0 Credit / Field of Study: Technical MS - Management Services

Breakout Option #5 - Creating a Culture of Innovation: A Fireside Chat with Executive Leadership from Automation Anywhere[Add session to calendar](#)

BDO's Technology Industry Co-leader, Aftab Jamil, sits down with Clyde Hosein, CFO and Mihir Shukla, CEO and Co-Founder from Automation Anywhere and their customer Dominic Cugini, SVP & Sr. Director of Service Digitization, Keybank, to discuss how innovation drives performance. Innovation isn't siloed with R&D departments—companies must create a genuine culture of transformation at all levels. Employees should see innovation as part of their job, and companies must cultivate innovators.

Automation Anywhere is a pioneer and leader in the use of bots to drive productivity while reducing costs for the world's largest enterprises. As a leader in this growing industry, Automation Anywhere generates greater revenues and market share than its top three competitors combined.

In 2020, organizations worldwide had to restructure office-based processes to suit remote operations. In response, Automation Anywhere enhanced its platform to allow users to navigate this new era. Automation Anywhere has innovation in its DNA, and its executives are here to share how we can do the same.

After this program participants will be able to:

- ▶ Create an innovation culture that drives superior performance
- ▶ Synchronize talent and de-clutter siloed practices
- ▶ Align innovation strategy with enabling technology and analytics to accelerate business performance

CPE 1.0 Credit / Field of Study: Non-Technical Learning BMO - Business Management & Organization

DAY 1

Wednesday, December 16

3:10 - 4:00 PM Eastern Time

What's Next for Managing Your Business - Part 2 Breakouts**Breakout Option #1 - Tax Relief Strategies for Resilience: Understanding the Opportunities Afforded by Recent Legislation and Planning for Recovery**[Add session to calendar](#)

Join BDO professionals Joan Vines, Jeff Bilsky, and Scott Hice for a continuation of our discussion regarding the critical role of the tax function in recovery planning. We will explore the Recover and Thrive phases of BDO's Resilience Framework (in Part 2). Implementing long-term strategies for total tax liability, tax transformation, and the future makeup of your workforce is accomplished by executing real short-term strategies. In this segment we will discuss how our current environment has affected the key areas of total tax liability and how the implementation of new technologies can create a competitive advantage in the final phases of the resiliency cycle.

After this program participants will be able to:

- ▶ Identify tax relief strategies created by recent legislation that align with the Recover and Thrive phases of the resiliency cycle
- ▶ Discuss changes in the workforce environment and the tax implications on long-term strategy
- ▶ Recognize how new technologies can assist in the management of total tax liability

CPE 1.0 Credit / Field of Study: Technical TX - Taxes

Breakout Option #2 - The Challenging Landscape of Employee Benefit Plans[Add session to calendar](#)

Plan Sponsors have encountered unprecedented times which created issues and opportunities this past year. Join BDO Assurance Professionals Beth Garner and Joanne Szupka to uncover anything you may have missed that needed to change for your plan and what you need to do to manage your plan in the future.

After this program participants will be able to:

- ▶ Identify some of the many challenges, issues, and opportunities that 2020 brought to plan sponsors
- ▶ Define practical knowledge around benefit plan best practices to apply to your plan for the 2021 calendar year
- ▶ Discuss trends and planned regulations for employee benefit plans in 2021

CPE 1.0 Credit / Field of Study: Technical AU - Auditing

DAY 1

Wednesday, December 16

3:10 - 4:00 PM Eastern Time

What's Next for Managing Your Business - Part 2 Breakouts

Breakout Option #3 - Building Resilience through Automation[Add session to calendar](#)

Many organizations are turning to automation to drive efficiency and cost savings across their operations, applications and IT platforms. The extent of automation deployment may vary from organization to organization, but one thing remains clear: the use of automation will continue to accelerate in the coming years. In this session, BDO Professionals Susie Cummings, Kirstie Tiernan, and Shraddha Shah will discuss how to identify candidates for automation, explore various solutions that can be applied across your business, including finance and accounting, and identify ways to cost effectively drive innovation in your firm.

After this program participants will be able to:

- ▶ Recognize opportunities for automation in their own organizations
- ▶ Apply techniques to various departments to automate processes and procedures
- ▶ Identify ways to innovate key operational functions

CPE 1.0 Credit / Field of Study: Technical IT - Information Technology

Breakout Option #4 - Impact on Accounting Operations[Add session to calendar](#)

While the full impact of the novel Coronavirus has yet to be seen, it is clear companies of all sizes are contending with an economic and health challenge unlike any the United States has seen in generations. Join BDO Professionals Brian Black and Greg Gratteau as they discuss the impact the pandemic has had on accounting operations and how it has changed the way we will work moving forward.

After this program participants will be able to:

- ▶ Manage company culture in a virtual world
- ▶ Engage with employees to re-skill and up-skill based on changing organizational needs
- ▶ Foster team engagement remotely

CPE 1.0 Credit / Field of Study: Non-Technical BMO - Business Management & Organization

Breakout Option #5 - How Private Equity is Transforming the Future of Healthcare & Life Sciences[Add session to calendar](#)

Join moderator, Scott Hendon, BDO Global and National Leader, Private Equity and panelists, Matt Jameson, CFA, Managing Director, Assured Healthcare Partners; Patrick Burns, Director, Azure Intelligent Cloud, Health & Life Sciences; Microsoft; Lance Minor, BDO National Leader, Life Sciences; Steven Shill, BDO Global and National Leader, Healthcare; and Michael Lee, Principal, BDO Digital.

2020 accelerated the transformation of the healthcare industry, forcing what were once long-term transitions into unavoidable mandates. To fulfill them, the healthcare, pharmaceutical and life sciences sectors had to look beyond industry borders, partnering with technology companies and private equity funds to evolve to meet patient needs and scale up research and clinical trials. When done well, these new partnerships won't just help manage the current crisis—they'll shape the future of healthcare around the world. This session will feature a candid conversation between representatives from the healthcare, life sciences, private equity and technology industries, who will discuss how they're coming together to reimagine what it means to deliver care to patients.

We'll explore how the disruption of 2020 has created new opportunities, including:

- ▶ How collaboration with private equity and technology can help healthcare companies combat financial distress, build up scale and capitalize on innovation
- ▶ What specific health sectors are most likely to draw PE investment and why
- ▶ How the pandemic served as a catalyst to marry the care delivery model to technological innovation at all levels, from physician practices to pharmaceutical manufacturers

CPE 1.0 Credit / Field of Study: Technical SK - Specialized Knowledge

DAY 1

Wednesday, December 16

4:10 - 5:00 PM Eastern Time

What's Next for Capitalizing on New Opportunities

[Add session to calendar](#)

During this session, William Eisig, BDO's National Managing Partner of Assurance will moderate a panel of private equity professionals who will share their outlook for the year ahead. Special guests include Scott Adelson, Co-President & Global Co-Head, Corporate Finance, Houlihan Lokey; Jeremy Holland, Managing Partner, Origination, Riverside Company; Bert Notini, Managing Director, New Mountain Capital, and Robert (Tre) Sayle, Partner, ThomaBravo. This distinguished panel will discuss the macro trends and growth drivers shaping their 2021 investment priorities by industry, geography and deal type. Join us to uncover where the biggest opportunities exist for business spanning M&A, IPOs, disruptive technologies and market shifts as you look to capitalize on the lasting forces of change brought on by the pandemic.

After this program participants will be able to:

- ▶ Understand key areas for growth and investment as we enter the new year
- ▶ Identify opportunities to capitalize on the lasting forces of change brought on by the pandemic
- ▶ Apply our panelists' insights to their own plans for the year ahead

CPE 1.0 Credit / Field of Study: Technical MS - Management Services



DAY 2

Thursday, December 17

11:00 - 11:40 AM Eastern Time

Welcome and Opening Remarks: The Rules of Business Reinvented[Add session to calendar](#)

When COVID-19 hit, having a comprehensive digital strategy became a necessity for businesses of all sizes. From new technologies and new business models to new ways of working, the decisions we make to transform our businesses and adapt quickly to new realities can mean the difference between surviving - and ultimately thriving - or being left behind.

Join BDO USA, LLP Chief Operating Officer, Stephen Ferrara and Gregory Anton, former AICPA Chair and Market Leader for BDO USA's Rocky Mountain offices as they discuss the impact of the digital economy and what's next for our businesses as we embrace disruption, with practical innovation to thrive into the future. Greg will challenge your thinking about the future using real-world examples and a discussion around automation and transformation. Steve will provide insights into BDO's own transformation leaving the audience ready for the day's sessions.

Non-CPE Session

11:40 AM - 12:30 PM Eastern Time

What's Next for Supply Chain - Rethinking Your Global Value Chain to Optimize Profitability and Gain a Competitive Advantage[Add session to calendar](#)

Join moderator, Eskander Yavar, BDO's Global Value Chain Solutions Lead Partner and Manufacturing Practice Leader and panelists, Tom Stringer, Practice Leader, Site Selections & Incentives, Barb Derus, Central and Southeast Transfer Pricing Leader, and Jeff Pratt, Supply Chain Practice Leader, as they discuss one of the most important topics to come to light during the pandemic.

The COVID-19 crisis has exposed weaknesses and gaps in global value chains that can no longer stay on the backburner. While COVID-19 may be the catalyst, it is the culmination of multiple years-long trends that have made improving value chain performance both an urgent business need and opportunity. The pandemic has further amplified existing issues that plague global value chains and prompted organizations to consider diversifying their supply chains to mitigate risks and boost agility. Join BDO leaders as they discuss how COVID-19, global economic challenges and geopolitical relations are spurring organizations to implement a resilient global value chain in our new reality.

After this program attendees will be able to:

- ▶ Recognize value chain trends from across the world and how they can affect your company's ability to respond to and optimize for demand
- ▶ Define ways to create value across your entire value chain that can result in increased profitability and a competitive advantage
- ▶ Identify how to reduce risk and increase reliability in your value chain ecosystem
- ▶ Estimate your company's capacity to improve speed to market and customer service

**CPE 1.0 Credit / Field of Study: Non-Technical Learning
PRO - Production**

DAY 2

Thursday, December 17

12:40 - 1:30 PM Eastern Time

What's Next for Innovation and Transformation Innovation Lab Breakouts

Breakout Option #1 - Keeping Pace with the Industry 4.0 Revolution: Rethinking how Assurance Services are Provided via the Technology Driven Audit[Add session to calendar](#)

BDO Audit and Innovation leaders, Chris Orella, Brian Miller, and Phillip Austin will explore how leveraging technology in audits allow the right professionals to reduce inefficiencies and work on what matters most. Our approach focuses on foundational technology, assurance technology, and automation, to deliver services that are highly valued by users and are performed by people doing evaluative, insight driven, and meaningful work.

After this program participants will be able to:

- ▶ Describe the various innovative tools and resources that may be leveraged for now in the current audit cycle
- ▶ Understand the importance of data literacy in technology driven audits, including new risk literacy
- ▶ Identify ways to leverage data insights to inform work on those things that matter most

CPE 1.0 Credit / Field of Study: Technical AU - Auditing

Breakout Option #2 - Tax Transformation: Optimizing the Performance of Your Tax Department[Add session to calendar](#)

Join Scott Hice, Tax Performance Engineering Practice Leader and Haley Dobre, Tax Managing Director, as they explore the road to tax automation with real-time insight that starts with transforming your tax department - fully integrating processes, people, technology and data to understand total tax liability and forecast how decisions and changes will impact tax standing. By optimizing the performance of the tax practice, businesses can better navigate the increasingly complicated web of tax laws and regulations, enhance the tax department's adaptability and help gain insights to inform and drive business strategy.

After this program participants will be able to:

- ▶ Demonstrate the benefits of tax transformation and technology
- ▶ Recognize the uses of tax software and how it can transform your data
- ▶ Apply the software in your daily work and integrate into your current systems

CPE 1.0 Credit / Field of Study: Technical TX - Taxes

Breakout Option #3 - Innovate Your AI Strategy with Data Analytics[Add session to calendar](#)

These days, many organizations are waking up to the reality that data and artificial intelligence (AI) will play a critical role in their future. Leaders are realizing that they need a strong data and AI strategy to ensure their organization's success. During this discussion, BDO Professionals Kirstie Tiernan and Rob Wellen will outline innovative steps your organization can take to develop and implement a cutting-edge data and AI plan.

After this program participants will be able to:

- ▶ Discuss the role that an AI strategy is playing in middle market organization
- ▶ Evaluate multiple data and AI case studies
- ▶ Learn the steps to establishing and executing a Data and AI strategy

CPE 1.0 Credit / Field of Study: Technical IT - Information Technology

DAY 2

Thursday, December 17

1:45 - 3:00 PM Eastern Time

What's Next for Leaders[Add session to calendar](#)

Join Keynote Speaker, Raj Sisodia, FW Olin Distinguished Professor of Global Business and Whole Foods Market Research Scholar in Conscious Capitalism at Babson College; Co-Founder and Co-Chairman of Conscious Capitalism, Inc. for a motivational presentation followed by a fireside chat with BDO USA CEO Wayne Berson, Chief People Officer Cathy Moy, and Industry Programs Managing Partner Joe Johnson.

We are living through a period that will fundamentally change the business landscape, a period of previously unseen challenges. How a company strengthens its stable and trusted foundations while remaining nimble and open to reinvention will be a critical element in remaining resilient during times of crisis. To come back better than before will require the collective efforts of us all. To survive - and eventually thrive - we will need to anticipate unknown challenges and come together to tackle them. We need to think differently, work collaboratively, and problem-solve creatively. We need to identify and live our core values and higher purpose - and we need to take care of one another.

After this program participants will be able to:

- ▶ Define how listening and leading with empathy bolsters organization resilience
- ▶ Demonstrate how being rooted in core purpose and values will help navigate uncertainty
- ▶ Describe how building trust, creativity and innovation into your culture creates an agile workforce

Stay Connected with Raj Sisodia:

rajsisodia@gmail.com / www.rajsidodia.com

Twitter: @RajSisodiaCC

**CPE 1.5 Credits / Field of Study: Non-Technical Learning
PD - Personal Development**

3:10 - 4:00 PM Eastern Time

**What's Next for Supporting Your Workforce?
People, Places & Productivity**[Add session to calendar](#)


Join moderator, Stephanie Giammarco, National Practice Leader BDO Digital, and panelists, Jerome Ryan, Director of Crisis Management and Business Continuity services, Greg Gratteau, Managing Director of Human Capital Management services, Ross Forman, Managing Director of Corporate Real Estate Advisory, Walter Seliga, Managing Director and National Co-Leader of Infrastructure and Cloud Solutions, and Phillip Austin, National Managing Partner of Assurance, as they discuss what "work" may look like in 2021 and beyond.

With 2020 turning into a watershed year for how businesses operate, organizations nationwide have had to make difficult decisions around their workforce, real estate footprints, and leadership styles. Now, their attention has shifted toward thinking about What's Next for Work. From human capital considerations around skillsets, recruiting and leadership, risk mitigation methods, data privacy and facilities management, to what the future holds for productivity, technology and innovation, what "work" looks like in the future will be very different from what it looked like in the past.

After this program participants will be able to:

- ▶ Describe how organizations have emerged from or adapted to remote working and are rethinking the way we work, where we work, and how we work.
- ▶ Review how businesses can position themselves and their workforces to adapt to both emerging realities as well as the lingering effects of the crisis.
- ▶ Relate how the pandemic has changed how senior leadership makes decisions to manage their businesses and their people.

**CPE 1.0 Credit / Field of Study: Non-Technical Learning
BMO - Business Management & Organization**



BDO is the brand name for BDO USA, LLP, a U.S. professional services firm providing assurance, tax, and advisory services to a wide range of publicly traded and privately held companies. For more than 100 years, BDO has provided quality service through the active involvement of experienced and committed professionals. The firm serves clients through more than 65 offices and over 700 independent alliance firm locations nationwide. As an independent Member Firm of BDO International Limited, BDO serves multi-national clients through a global network of more than 88,000 people working out of more than 1,600 offices across 167 countries and territories.

BDO USA, LLP, a Delaware limited liability partnership, is the U.S. member of BDO International Limited, a UK company limited by guarantee, and forms part of the international BDO network of independent member firms. BDO is the brand name for the BDO network and for each of the BDO Member Firms.

Material discussed in this publication is meant to provide general information and should not be acted on without professional advice tailored to your organization's individual needs.

© 2020 BDO USA, LLP. All rights reserved. www.bdo.com

