July 20-22, 2025
Marriott Raleigh City Center
Raleigh, NC

INFORMATION TECHNOLOGY ALLIANCE
Internal Tech Leaders
SUMMER MEETING

Sunday, July 20

1:00 PM	4:00 PM	**Optional Meet up Activity at Tobacco Road Brewery**
4:00 PM	9:00 PM	**Badge Pickup - Registration Desk - State Ballroom Foyer**
5:00 PM	6:30 PM	**Opening Cocktail Reception - University Ballroom**
6:30 PM	9:00 PM	**Welcome Dinner Party - University Ballroom**

Monday, July 21

		COMBINED TRACKS (Strategic & Tactical) **State Ballroom D**
7:00 AM	8:00 AM	**Breakfast - University Ballroom**
8:00 AM	8:10 AM	**Welcome and Agenda Review** **Geni Whitehouse, ITA President**
8:10 AM	9:30 AM	**Cherry Bekaert Host Firm Welcome And Executive Presentation** **Jack Redfield, Cherry Bekaert Information Security Officer and Cherry Bekaert CEO**
9:30 AM	10:00 AM	**Break**
10:00 AM	11:30 AM	**AICPA - State of the Profession**
11:30 AM	12:30 PM	**Lunch - University Ballroom**
12:30 PM	1:45 PM	**Knowing What You Know Now: Lessons from the CIO Frontlines**
1:45PM	2:00 PM	**Break**

		STRATEGIC TRACK **State Ballroom C**	**TACTICAL TRACK & Combined** **State Ballroom D**
2:00 PM	3:15 PM	**Enterprise Architecture Tools and Roadmapping**	**Bridging the Divide: Data Migration and Tech Consolidation After M&A**
3:15 PM	3:30 PM	**Break**	
3:30 PM	5:00 PM	**ITL Strategic Roundtable: Meaningful Metrics to Evolve our Profession**	**ITL Tactical Roundtable**
6:00 PM	9:00 PM	**Monday Night Party and Dinner at Jaguar Bolera** *(Dinner, Drinks & Transportation for all attendees included)*	

Tuesday, July 22

		STRATEGIC TRACK **State Ballroom C**	**TACTICAL TRACK & Combined** **State Ballroom D**
7:30 AM	8:30 AM	**Breakfast - University Ballroom**	
8:30 AM	10:00 AM	**Ctrl+Alt+Merge: CIOs Share Secrets to a Seamless Integration** *(Navigating the Complexities of Merging Large Accounting Firms)*	**AI, Agents, and Productivity: Tactical Applications and Firm Innovation**
10:00 AM	10:30 AM	**Break**	
10:30 AM	12:00 PM	**Raleigh Rewired: CRM, Marketing Automation & Enabling the New Client Experience**	**From Idea to Impact: A Practical Guide to Process Automation Success**
12:00 PM	1:15 PM	**Lunch - University Ballroom**	
1:15 PM	2:45 PM	**Darwin Tech Awards: Valuable Lessons from Past Mistakes** **State Ballroom D**	
2:45 PM	3:00 PM	**Break**	
3:00 PM	4:15 PM	**ITL Strategic Roundtable**	**ITL Tactical Roundtable**
4:15 PM	4:45 PM	**Closing Discussion And Adjournment** **Geni Whitehouse, ITA President and** **Jack Redfield, Information Security Officer of Host Firm-Cherry Bekaert** **State Ballroom D**	
6:00 PM	8:30 PM	**Optional Meet Up For Members Staying Until Wednesday** **The Pit and Crank Arm Brewery**	

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Monday, July 21

8:00am – 8:10 am
Track - All
Room: State Ballroom D

Welcome and Agenda Review

Geni Whitehouse – ITA President, Napa, CA

ITA President Geni Whitehouse will introduce our Summer ITL Meeting Committees and welcome everyone. She will also provide an overview of the Summer ITL Meeting agenda prior to introducing our Sunday Host Firm.

8:10am – 9:30 am
Track - All
Room: State Ballroom D

Host Firm Welcome and Executive Presentation

Jack Redfield – Information Security Officer, Cherry Bekaert, Richmond, VA
Adi Garg – Parthenon Group

Session Description - TBD

10:00am – 11:30am
Track – All
Room: State Ballroom D

AICPA – State of the Profession

Facilitator:

Lisa Simpson – Vice President Firm Services, AICPA, Durham, NC

Lisa Simpson, AICPA VP – Firm Services, will provide an update on developments in the profession. Lisa speaks with leaders from firms across the country and will share thoughts on the latest trends including expanding assurance opportunities, mergers and acquisitions, technology insights, and more.

12:30pm – 1:45pm
Track – All
Room: State Ballroom D

Knowing What You Know Now, Lessons from the CIO Frontlines

Facilitator:

Jack Redfield – Information Security Officer, Cherry Bekaert, Tampa, FL

Panelists:

Robert Neill – CIO, Weaver, Fort Worth, TX,
Kevin Sexton – CIO, Cohen & Co., Cleveland, OH
John Fleischer – SVP & CIO, CBIZ, Cleveland, OH
JD Stotts – CIO, Whitley Penn, Fort Worth, TX

Step into a candid, high-energy conversation where seasoned CIOs reflect on the pivotal lessons, they wish they'd known when they first stepped into the role. In this interactive 90-minute session, facilitator Jack Redfield will guide a panel of fellow CIOs through stories of missteps, mindset shifts, and moments of clarity that shaped

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their leadership journeys. Expect a mix of humor, humility, and hard-won wisdom—plus plenty of opportunities to share your own insights and questions. Whether you're a veteran, newly minted CIO or have CIO aspirations, this session promises to be both entertaining and deeply valuable.

2:00pm – 3:15pm
Track – Strategic
Room: State Ballroom C

Enterprise Architecture Tools and Road Mapping

Hitesh Ashar – Director of Director Strategy, LBMC, Brentwood, TX
Nick Schweitzer – Wipfli, Enterprise Architect, Wauwatosa, WI

Join us for an insightful session on Enterprise Architecture (EA) where we explore its significance, the necessity of purpose-built tools, and how EA differs from a CMDB and a Project Portfolio Management tool. Learn how to leverage EA tools for effective road mapping, enhance business capabilities, and discover what to look for in an EA tool. We'll also showcase popular tools like LeanIX and others. Don't miss this opportunity to elevate your organization's strategic planning and IT alignment!

2:00pm – 3:15pm
Track – Tactical
Room: State Ballroom D

Bridging the Divide: Data Migration and Tech Consolidation After M&A

Facilitator:
Colleen Beyer - Director, PMO & IT Business Office, Cherry Bekaert, Nashville, TN
Panelists:
Scott Newcomer – Director Enterprise Applications, Crowe, South Bend, IN
Sam Kube – Products & Digital Solutions Delivery Lead Cherry Bekaert, Richmond, VA
Curtis Shelton – Director of Sales & Marketing, CBIZ, Cleveland, OH
Kevin Fraase – Director of Technology Integration, Eide Bailly, Fargo, ND

Mergers and acquisitions often bring a surge of overlapping systems, siloed data, and conflicting vendor contracts. This panel brings together technology leaders and integration experts to explore how organizations can successfully migrate data across platforms and reduce technology sprawl—without disrupting operations or customer experience.

Panelists should bring a blend of technical expertise, strategic insight, and cross-functional leadership. They must be able to speak to real-world experiences in data migration, IT consolidation, and vendor contract management during mergers and acquisitions. Panelists will:

• Have hands-on knowledge of migrating data across legacy and modern systems with minimal disruption.
• Offer frameworks for rationalizing technology stacks and aligning IT with business strategy.
• Share contract negotiation tactics for customer-facing platforms, with a focus on flexibility, cost control, and integration.
• Address governance, compliance, and risk mitigation in complex transitions.
• Provide insights on managing cultural and operational change, fostering collaboration across IT, legal, and business units.

Learning: This interactive session will include a moderated discussion, audience Q&A, and practical takeaways for CIOs, enterprise architects, and M&A integration teams.

3:30pm – 5:00pm
Track – Strategic
Room: State Ballroom C

ITL Strategic Roundtable: Meaningful Metrics to Evolve our Profession

Facilitator:

Aaron Gray – Director Enterprise Practice Management, CLA, Phoenix, AZ

In this session, we will review the metrics submitted by members with some general observations on trends and anomalies. During the roundtable sessions we will discuss:

• Best practices for collecting, analyzing, and presenting data.
• The importance of metrics in informing business decisions and driving organizational success, as well as the challenges when analyzing and comparing data.
• How are Application, Financial, and Operational metrics are evolving and how we can ensure that what is being collected is optimal and meaningful.

By the end of the session, participants will have gained a deeper understanding of the value and importance of metrics, as well as practical strategies for improving the quality and reliability of their own data. Join us for a collaborative discussion that will help you leverage metrics today and ensure we continue to evolve this annual process.

3:30pm – 5:00pm
Track – Strategic
Room: State Ballroom D

ITL Tactical Roundtables

Facilitator: *Jack Redfield – Information Security Officer, Cherry Bekaert, Richmond, VA*
Table Leaders:
Infrastructure & Leader - TBD
Applications and Development - TBD
Project Management - TBD
Security/Compliance - TBD
Support Desk / Service - TBD

The ever-popular ITL Tactical Roundtables for this ITL Summer Meeting will be those listed below along with the Table Leaders. Discussion topics will be provided for each table…or feel free to branch out on your own!
Table Topics:
•   Operations (infrastructure)
•   Security/Privacy/GRC
•   Project Management/Business Analysts
•   Applications (Internal dev, SaaS, inventory, etc.)
•   Architecture (network, storage, DR, etc)

8:30am – 10:00am
Track – Strategic
Room: State Ballroom C

Ctrl+Alt+Merge: CIOs Share Secrets to a Seamless Integration (Navigating the Complexities of Merging Large Accounting Firms)

Facilitator*:*
Thanigs Muthu – CIO, LBMC, Brentwood, TN
Panelists:
John Fleischer – SVP & Chief Informational Officer, CBIZ, Cleveland, OH
John Bowles – CIO, Forvis Mazars, Hendersonville, NC
Allen Smith – CIO, Baker Tilly, Madison, WI

Join us for an insightful panel discussion where CIOs share their experiences and strategies on the complexities of integrating large accounting firms. This session will delve into the significant differences between mergers of equals - where two large firms come together as partners – and traditional acquisitions where a large firm absorbs a smaller one. Integration Strategy and Execution: Understand the variations in overall integration strategy, timeline management, and success measurement between merging large firms as equals and the acquisition of smaller firms.

Our panelists will also share their personal experiences and lessons learned from past mergers, highlighting best practices and contingency plans to address unforeseen issues. Whether you are part of a firm preparing for a merger or simply interested in the intricacies of IT integration, this session promises to provide valuable perspectives and actionable insights.

By the end of this session, participants will be able to:
- Understand Technological Integration Differences:
    - Identify the distinct challenges and strategies for technology integration in mergers of equals versus traditional large-to-small firm acquisitions.
    - Recognize the importance of aligning IT infrastructures and cybersecurity protocols in different merger scenarios.
- Navigate Process Standardization:
    - Comprehend the unique process integration challenges faced in mergers of equals compared to traditional acquisitions.
    - Develop strategies to standardize business processes, manage redundancies, and ensure regulatory compliance effectively in both types of mergers.
- Manage Cultural and Talent Integration:
    - Implement successful cultural integration plans that address the specific needs of merging large firms as equals and traditional acquisitions.
    - Utilize effective techniques for retaining top talent and managing change and resistance among employees in different merger contexts.

- Design and Execute Integration Strategies:
  - Formulate comprehensive integration strategies tailored to the unique demands of mergers of equals versus traditional acquisitions.
  - Manage integration timelines, track progress, and measure the success of IT integration initiatives for both types of mergers.
- Apply Best Practices and Lessons Learned:
  - Apply best practices and lessons learned from real-world experiences shared by CIOs in previous mergers.
  - Develop contingency plans to address unforeseen issues that may arise during the integration process.
- Enhance Communication and Collaboration:
  - Foster effective communication and collaboration among IT teams during the merger process, ensuring smooth transitions and alignment of goals.
  - Address and bridge differences in IT skills and expertise between merging firms, facilitating a more cohesive integration.

These learning objectives will provide participants with the knowledge and tools needed to navigate the complexities of firm mergers, whether merging equals or acquiring smaller firms, from a CIO perspective.

8:30am – 10:00am
Track – Tactical
Room: State Ballroom D

AI, Agents and Productivity: Tactical Applications and Firm Innovation

Facilitator:
Rob Backus – Chief Technology Officer, Katz Sapper and Miller, Indianapolis, IN
Panelists:
Mo Galal – Director, Application Development & Automation, Aprio, Atlanta, GA,
*Jeff French **–** Chief Information Officer, Elliott Davis, Greenville, SC*

This session focuses on how firms are leveraging AI, agents, and other productivity-enhancing technologies to drive efficiency and innovation at a tactical level. Panelists will share how their firms are deploying tools and automations that impact workflows, decision-making, and operational agility. The conversation may delve into technical implementations, making this an ideal opportunity for CIOs to showcase team members who are directly involved in AI initiatives, pilot programs, or system integrations. The goal is to provide practical, peer-driven insights into what's working and what's next in AI-driven productivity.

10:30am – 12:00pm
Track – Strategic
Room: State Ballroom C

Raleigh Rewired: CRM, Marketing Automation & Enabling the New Client Experience

Facilitator:
Debbrata Das – CohnReznick, Parsippany, NJ
Panelists*:*
Curtis Shelton – Application Director, CBIZ, Cleveland, OH
Erin Connolly-Kriarakis – Director - Marketing, CohnReznick, Parsippany, NJ

Intuitive and seamless end-user experience has become a critical business enabler for retaining clients and converting prospects: CRM and marketing automation are at the heart of this transformation. As client expectations evolve, forms must rethink how they engage, personalize, and deliver value across every touchpoint. This session explores how modern CRM strategies and marketing automation tools are reshaping the way firms connect with clients and prospects.

In this session, we will examine the latest trends in technologies tailored for professional services. Whether you are evaluating new tools or looking to optimize your current systems, this session will provide practical insights and inspiration to help you rewire your approach to client engagement.

The objective is for attendees to be able to learn and apply the following:
- Describe how evolving end-user expectations are influencing CRM and marketing automation strategies for clients and prospects.
- Identify key features and capabilities of modern CRM and marketing automation tools that enhance target audience engagement.
- Develop actionable strategies to personalize and optimize the client journey using data-driven insights leveraging modern technologies such as AI/ML.
- Compare different approaches to integrating CRM and marketing platforms with existing systems to improve operational efficiency.

10:30am - 12:00pm
Track – Tactical
Room: State Ballroom D

From Idea to Impact: A Practical Guide to Process Automation Success

> **Facilitator**:
> *Hitesh Ashar – Director of Director Strategy, LBMC, Brentwood, TX*
> **Panelists**:
> *TBD*

In today's fast-paced environment, successful process automation can drive measurable improvements in efficiency, accuracy, and scalability. But true success goes beyond technology, it requires a strategic approach from ideation to implementation. In this session, we'll walk through the complete lifecycle of process automation: identifying automation opportunities, gathering the right requirements, evaluating potential solutions, managing change, implementing with impact, and ensuring adoption through effective training. The hope is that this session will provide you with actionable insights and proven practices to help your firm unlock the full value of automation**.**

1:15pm – 2:45pm
Track – All
Room: State Ballroom D

Darwin Tech Awards: Valuable Lessons from Past Mistakes

> **Facilitator**:
> *Amanda Brown – Director, CBIZ, Indianapolis, INA*

Join us for an engaging roundtable session where everyone can share their candid experiences of past missteps and the invaluable lessons learned. This open and honest discussion provides a unique opportunity to gain

insights into the challenges and pitfalls faced in the ever-evolving tech landscape. Attendees will learn how leaders turned their mistakes into growth opportunities, driving innovation and resilience in their organizations. Whether you're a seasoned professional or new to the industry, you'll leave inspired and equipped with practical strategies to avoid similar pitfalls in your own journey.

Learning Objectives
- Identify Common Pitfalls: Participants will be able to identify at least three common mistakes made by leaders in the industry, as discussed during the roundtable session.
- Analyze Lessons Learned: Participants will be able to analyze the lessons learned from each mistake shared by attendees, articulating how these lessons can be applied to prevent similar issues in their own organizations.
- Develop Action Plans: Participants will be able to develop a personalized action plan to address potential mistakes in their own projects, incorporating the best practices and strategies discussed in the session.
- Implement Strategies for Growth: Participants will be able to implement at least two strategies for turning mistakes into growth opportunities, as evidenced by examples shared by the attendees during the session.

3:00pm – 4:15pm
Track – Strategic CPE – 75 min.
Room: State Ballroom C
Strategic Roundtable Discussion
Thanigs Muthu – Chief Information Officer, LBMC, Brentwood, TN
Biju Samuel – Chief Information Officer, Frazier & Deeter, Atlanta, GA
Session Description - TBD

3:00pm – 4:15pm
Track – Tactical CPE – 75min.
Room: State Ballroom D
Tactical Roundtables
Facilitator:
Jack Redfield – Information Security Officer, Cherry Bekaert, Richmond, VA
Infrastructure & Leader - *TBD*
Applications and Development - *TBD*
Project Management - *TBD*
Security/Compliance - *TBD*
Support Desk / Service - *TBD*
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- Security/Privacy/GRC
- Project Management/Business Analysts
- Applications (Internal dev, SaaS, inventory, etc.)

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- Architecture (network, storage, DR, etc)

4:15pm – 4:45pm
Track – All
Room: State Ballroom D

Closing Discussion and Adjournment

Jack Redfield – Information Security Officer, Cherry Bekaert, Richmond, VA
Geni Whitehouse – ITA President, Napa, CA

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NASBA Registry Information

Credit Hours: Up to 15 Hours of CPE available. CPE credits are granted on a 50-minute hour. After the first hour, sponsors can report half-credits. **However,** half-credits are not allowed / approved in all states. If half-credits are **not** allowed, participants need to round back to the last full credit.

Learning Objective: Depending upon the sessions you choose to attend, you will learn best practices and hear what other industry leaders are doing with respect to: current and emerging technologies, practice and project management, staffing, marketing, and customer/client service.

Program Content: The program will feature three tracks of educational content: Internal IT for large CPA Firms and Technology Product, Support and Service Updates/Discussions. In each track, sessions will be offered about the latest technologies or practice methodologies that will enable member firms to be more successful.

Field of Study:
Business Management and Organization

Level – Update
Prerequisites – Minimum 3 Years as an IT Consultant or Technician
Advance Preparation – None
Instructional Delivery Method – Lecture & Discussion

NASBA Registry of CPE Sponsors
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Administration
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