Sunday, November 2

7:00 AM	1:30 PM	**Optional Social Events**
2:30 PM	7:30 PM	**Badge Pickup**
3:30 PM	4:30 PM	**Meet, Greet & Eat Session**
4:30 PM	6:00 PM	**ITA Opening Session** **President's Welcome** by Geni Whitehouse *(30 minutes)* **KEYNOTE: What's Your Pink Cadillac?** by Ryan Campbell *(60 minutes)*
6:00 PM	7:30 PM	**Welcome Reception**
7:30 PM		**Dinner On Your Own and Various Partner Events**

Monday, November 3

7:00 AM	8:00 AM	**Breakfast**				
7:00 AM	5:00 PM	**Badge Pickup**				
8:00 AM	10:15 AM	**Monday Opening Session** by Geni Whitehouse *(45 minutes)* **KEYNOTE: The Stress Advantage** by Rebecca Heiss *(90 minutes)*				
Tracks & Sessions		**Consulting & Reselling (CR)**		**Client Accounting Services (CAS)**	**Internal Tech Leaders Sessions (ITL)**	
		CR TRACK 1	CR TRACK 2	CAS	ITL STRATEGIC	ITL TACTICAL
10:30 AM	12:00 PM	**K2 AI Centric GL and Other Tools**		**Setting the Stage: Introductions and CPA.com Update**	**Platform Fatigue is Real: How to Consolidate Your Stack**	
12:00 PM	1:15 PM	**Lunch**				
1:15 PM	2:45 PM	**Inside the AI Toolbox: Real Examples, Real Results**	**What Should We Be Measuring? Evolving Metrics and Benchmarks for Performance**	**CAS 3.0: From Insights to Impact – The Future of Client Advisory Services**	**Insource or Outsource Security Ops**	**Beyond the Phish: Creative Ways to Drive Security Awareness - Tools and Promoting Security Awareness Across the Team**
2:45 PM	4:00 PM	**The Power of Vertical Expertise: Building IP and Industry Credibility**	**Next in Line: Identifying and Developing Future Leaders in Flat Organizations**	**Future-Ready Talent - Building the Next Generation of Leaders**	**How has Private Equity Changed Your Day to Day**	**Cyber Resilience: Preparing for the Inevitable**
4:15 PM	5:15 PM	**Owners Roundtable - Current State of ITA**	**Future Leaders Roundtable**	**Continuous Close, Continuous Insight**	**ITL Strategic Roundtable: AI Use Hype Versus Reality CIO (or designee) only**	**ITL Tactical Roundtable: AI Use Hype Versus Reality**
5:30 PM	6:30 PM	**ITA IGNITE** by Mark Serverance *Beer and Wine will be provided*				
7:00 PM	9:00 PM	**Dinner and Party**				

Tuesday, November 4

7:00 AM	8:00 AM	**Breakfast**				
Tracks & Sessions		**Consulting & Reselling (CR)**		**Client Accounting Services (CAS)**	**Internal Tech Leaders Sessions (ITL)**	
		CR TRACK 1	CR TRACK 2	CAS	ITL STRATEGIC	ITL TACTICAL
8:00 AM	9:15 AM	**Economist KEYNOTE: Gearing Up for 2026** by Taylor St. Germain				
9:30 AM	10:45 AM	**K2 AI Security and Privacy**		**Crafting Unforgettable Client Journeys: Onboarding and Retention**	**Client Expectations Are Changing: How to Show You're Secure**	**Rethinking the IT Procurement Process: From Gatekeeper to Partner/ Contract Management**
11:00 AM	12:15 PM	**Owners Roundtable Continued - Future of ITA**	**Project Management Realities: Navigating Shifting Timelines and Team Workloads**	**Leading Across Generations and Borders**	**Product Development & Product Management in Public Accounting Firms**	**Securing the Hybrid/Remote Firm**
12:15 PM	1:30 PM	**Lunch**				
1:30 PM	2:45 PM	**Customer Retention: Using Data to Retain and Grow Key Accounts**	**Winning the Talent War: Retention Strategies in a Changing Landscape**	**CAS Fireside Chat**	**ITL Strategic Roundtable** *CIO (or designee) only*	**ITL Tactical Roundtables**
2:45 PM	3:15 PM	**Collaborative Wrap up session** - Geni Whitehouse				

Wednesday, November 6

8:30 AM	3:00 PM	**ITA Leadership Alliance (ILA) Base Camp** **(Note: Separate Registration Required)**
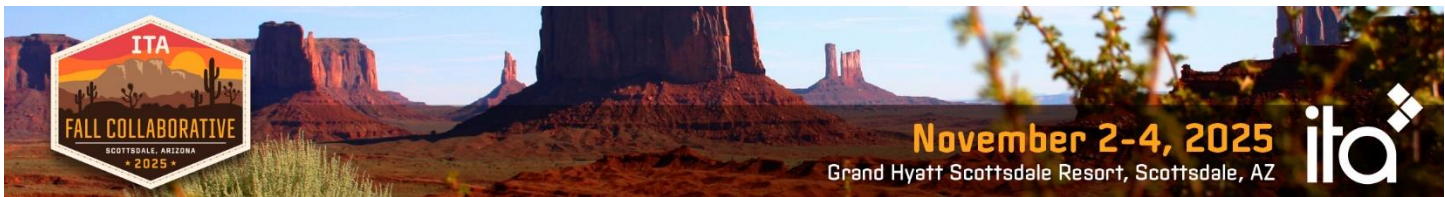
Consulting & Reselling - CR
Internal Technology Leader Tactical - ITL-T
Internal Technology Leader Strategic - ITL-S
Client Accounting Services - CAS

Sunday, November 2 - 4:30 to 6:00 pm - Welcome and Sunday Keynote

4:30 – 4:45 pm
President's Welcome & Introductions
Room: TBD

Geni Whitehouse – ITA President, Napa, CA

ITA President Geni Whitehouse will introduce our Fall Collaborative Committees and welcome our new members and guests. She will also provide an overview of the Fall Collaborative agenda prior to introducing our Sunday night keynote speaker.

4:45 – 6:00 pm
KEYNOTE: What's Your Pink Cadillac?
Room: TBD

Ryan Campbell – Mental Health & Resilience Keynote Speaker & Author, Nashville, TN

What's Your Pink Cadillac? The Transformational Power of Prioritizing Joy Dive into the joy-fueled resilience hidden in our hobbies, interests, and simple pleasures. In a fast-paced world where our challenges are relentless and the solutions seem out of reach, Ryan delivers a message of accessible, attainable change. From the highs of a world record-breaking expedition to the most unimaginable low of a plane crash and paraplegic diagnosis, Ryan uses his story to highlight the realities of adversity and the role of resilience. A message built on the importance of mental health and self-care, What's Your Pink Cadillac? uncovers the most unexpected, transformational tool discovered in the most unexpected place, the purchase of a 1960 Pink Cadillac.

Get ready to smile like a kid, step back and show up better.

Monday, November 3 – 8:00 – 10:00 am - Monday Morning General Session & Keynote

ALL
8:00 – 8:45 am
President's Opening Remarks
Room: TBD

Geni Whitehouse – ITA President, Napa, CA

ITA President Geni Whitehouse will introduce our Fall Collaborative Committees and share opportunities for participation. Geni will give an overview of the ITA Leadership Academy (ILA). Geni will share some other exciting ITA Events and plans.

ALL
8:45 – 10:15 am
KEYNOTE: The Stress Advantage
Room: TBD

Rebecca Heiss – Stress Physiologist & Keynote Speaker, Greenville, SC

We've gone through pandemics, supply chain issues, and uncertainty in global markets and now it's time to get back to work. What if instead of trying to fight stress, we could transform it into a competitive advantage?
In this eye-opening keynote, Dr. Rebecca reveals the secret upside of stress that the highest-performing athletes and leaders use to fuel their performance. Helping to move individuals and companies from symptoms of PTSD to PTG (Post Traumatic Growth), she

shares her simple science-based framework that allows anyone to stop fighting stress, and start leaning into it – improving productivity, increasing connection to others, and growing through challenge

Monday, November 3 - 10:30 am 12:00 pm

CR – ALL
K2: AI Centric and Other Tools
Room: TBD

CAS – ALL
Setting the Stage: Introductions and CPA .com Update
Room: TBD

> Ifran Dossani - Whitley Penn, Accounting & Advisory Servies, Dallas, TX
> Kane Polakoff – CohnReznick, Principal CFO Accounting & Advisory, Farmington Hill, MI
> Kim Blascoe – CPA.com, Sr. Director CAS Professional Services, New York, NY

ITL – ALL
Platform Fatigue is Real: How to Consolidate Your Stack
Room: TBD

Monday, November 3 – 1:15 – 2:30 pm

CAS – ALL
CAS 3.0: From Insights to Impact – The Future of Client Advisory Services
Room: TBD

> *Speaker TBD*

Client Accounting Services (CAS) is evolving rapidly—from polished reporting packages and recurring meetings to strategic projects, cross-service collaboration, and real-time insights that drive smarter decision-making. This session explores what CAS advisory looks like today, the factors that may change advisory in the next 3 - 5 years, and how advisory will likely transform as a result. We'll share a few visions of CAS 3.0 in 2030 and end with a vision most CAS practice leaders believe to be most likely.

CR-1
Inside the AI Toolbox: Real Examples, Real Results
Room: TBD

CR – 2
What Should We Be Measuring? Evolving Metrics and Benchmarks for Performance
Room: TBD

ITL – S
Insource or Outsource Security Ops
Room: TBD

ITL – T
Beyond the Phish: Creative Ways to Drive Security Awareness - Tools and Promoting Security Awareness Across the Team
Room: TBD

Monday, November 3 – 2:45 – 4:00 pm

CR – 1
The Power of Vertical Expertise: Building IP and Industry Credibility.
Room: TBD

CR – 2
Next in Line: Identifying and Developing Future Leaders in Flat Organizations
Room: TBD

CAS - ALL
Future – Ready Talent – Building the Next Generation of Leaders
Room: TBD
> **Moderator:**
> *John Pace – Partner & Director Outsources Accounting & Advisory Services, Bethesda, MD*
> *Heidi Grindle – CLA, CAAS Nonprofit Principal, Minneapolis, MN*

As technology reshapes the accounting landscape, firms must rethink how they hire, train, and scale. This session explores how firms are upskilling accountants to meet evolving demands, whether the right mix of majors is being recruited, and how automation and the use of global teams is influencing talent strategy. We'll dive into developing future CAS leaders with high-EQ and strategic thinking skills and share best practices for building the next generation of leaders. A panel of speakers, along with a collaborative roundtable, will showcase real-world upskilling plans as firms consider their next steps.

ITL – S
How has Private Equity Changed Your Day to Day
Room: TBD

ITL – T
Cyber Resilience: Preparing for the Inevitable
Room: TBD

Monday, November 3 – 4:15 – 5:15 pm

CR-1
Owners Roundtable – Current State of the ITA
Room: TBD

CR-2
Future Leaders Roundtable
Room: TBD

CAS – ALL
Continuous Close, Continuous Insight
Room: TBD
> *Speaker TBD*

This session highlights the current wave of AI-native and AI-enhanced accounting platforms looking to reshape CAAS. We'll look at new general ledgers like Rillet, Digits, and Puzzle, alongside additional automation tools built for CAAS teams. Latest enhancements from Intuit, Sage, and/or BILL will also be covered, with a focus on what CAAS leaders should monitor and stay ahead of to prepare for continuous close and continuous insight.

ITL-S

ITL Strategic Roundtable: AI Use Hype Versus Reality

Note: CIO (or designee) only

Room: TBD

ITL – T

ITL Tactical Roundtables

Room: TBD

Facilitator(s) TBD

The ever-popular ITL Tactical Roundtables for this Fall Collaborative will be those listed above along with the Table Leaders. Discussion topics will be provided for each table…or feel free to branch out on your own!

- Infrastructure:
- Service Delivery, Metrics and Support:
- Security / Compliance:
- App Dev:
- Project Management

Monday, November 3 – 5:30 – 6:30 pm

ALL

IGNITE

Room: TBD

Mark Severance – RKL eSolutions, Director of Cloud Sales, Simi Valley, CA

"Ignite" is back on the agenda! Ignite talks are creative, enlightening, and a perfect opportunity to live the ITA motto – Knowledge Increases in Value When It Is Shared. The concept of Ignite is where you'll see a few of our ITA members come up on stage and give 5 minute presentations about something personal or professional that they are passionate about. The concept of Ignite is to "Enlighten us but make it quick!" In prior ITA Ignite sessions we learned binder clip hacks, the joys and perils of taking risks, cycling's rules of the road, supporting and hiring US vets, men with brooms and a variety of other useful (and useless) topics. The whole idea behind Ignite is to learn something new about your ITA members in a fun and informal way. And beer and wine will be served!

Tuesday, November 4 – 8:00 – 9:15 am *KEYNOTE*

ALL

Economist Keynote: Gearing Up for 2026

Room: TBD

Taylor St Germain – ITR Economics, Economist, Senior Business Consultant & Speaker, Castle Rock, CO

Business cycle conditions are set to generally improve in 2026 (and beyond). It is important to know how much rise to expect, and for how long, for the general economy and specifically by markets. Additionally, we expect inflation pressures to heat up beginning in 2026 and in the following years. Beyond looking at the drivers of that inflation, we will present how much inflation to expect, and how high interest rates are likely to go through 2027. Not all markets and businesses are interest-rate sensitive. We will be looking at different relevant markets with an eye towards gauging how much of a headwind rising interest rates will present.

Earlier-turning segments of the economy will need to know how soon they will likely experience business cycle degradation and to what extent. The presentation will cover markets specific to the audience along with ITR Economics' outlook through 2027 for inflation, interest rates, downside risks, upside potential, and ITR Economics' extended outlook for the 2030s where appropriate.

Tuesday, November 4 – 9:30 – 10:45 am

CR - ALL

K2 AI Security and Privacy

Room: TBD

CAS – ALL
Crafting Unforgettable Client Journeys: Onboarding and Retention
Room: TBD

In today's competitive landscape, delivering an exceptional customer experience is critical for accounting and advisory firms to attract and retain clients. This session will explore proven strategies for creating seamless onboarding processes and fostering long-term client relationships. Attendees will learn how to design client-centric onboarding workflows that set clear expectations, build trust, and streamline communication from the first interaction. We'll also dive into best practices for nurturing existing clients, including proactive engagement, personalized advisory services, and leveraging technology to enhance client satisfaction.

ITL-S
Client Expectations Are Changing: How to Show You're Secure
Room: TBA

ITL – T
Rethinking the IT Procurement Process: From Gatekeeper to Partner/ Contract Management
Room: TBA

Tuesday, November 4 – 11:00 am – 12:15 pm

CR-1
Owners Roundtable Continued – Future of ITA
Room: TBA

CR – 2
Project Management Realities: Navigating Shifting Timelines and Team Workloads
Room: TBA

CAS – ALL
Leading Across Generations and Borders
Room: TBA
> *Mark Mallory – CLA, Principal, Minneapolis, MN*
> *John Pace – GRF, Partner & Director Outsourced Accounting & Advisory Services, Bethesda, MD*

ITL – S
Product Development & Product Management in Public Accounting Firms
Room: TBD

ITL – T
Securing the Hybrid/Remote Firm
Room: TBD

Tuesday, November 4 – 1:30 – 2:45 pm

CR-1
Customer Retention: Using Data to Retain and Grow Key Accounts
Room: TBD

CR - 2
Winning the Talent War: Retention Strategies in a Changing Landscape
Room: TBD

CAS – ALL

CAS Fireside Chat

Room: TBA

ITL – S

ITL Strategic Roundtable

Note: CIO (or designee) only

Room: TBD

ITL Tactical Roundtables

Room: TBA

Facilitator(s) TBD

The ever-popular ITL Tactical Roundtables for this Fall Collaborative will be those listed above along with the Table Leaders. Discussion topics will be provided for each table…or feel free to branch out on your own!

- Infrastructure:
- Service Delivery, Metrics and Support:
- Security / Compliance:
- App Dev:
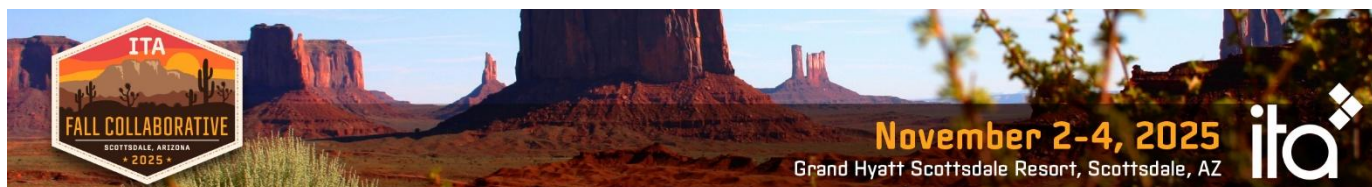- Project Management

Tuesday, November 4 – 2:45 – 3:15 pm

ALL

Collaborative Wrap Up

Room: TBA

Geni Whitehouse – ITA President, Napa Valley, CA

Combined General Wrap up session

NASBA Registry Information

Credit Hours: Up to 15.2 hours of CPE available. Basis: CPE credits are granted on a 50-minute hour. After the first hour, sponsors can report one-fifth-credits. **However,** one-fifth-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 m will feature tracks of educational content: IT Software Consulting (Sales, Support and Implementation), Internal IT for large CPA Firms, and perhaps others. In each track, sessions will be offered about the latest technologies or practice methodologies that will enable member clients or their businesses to be more successful.

Field of Study:
Business Management and Organization

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

NASBA Registry of CPE Sponsors
Information Technology Alliance (#107740) 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 website: **www.nasbaregistry.org**.

Administration
Records are maintained in accordance with CPE requirements. Questions, concerns or for more information regarding administrative policies such as complaint or refund should be made in writing to ITA Headquarters, 514 Daniels Street, Suite 361, Raleigh, NC 27605, Telephone (480) 515-2003.