McKONLY & ASBURY
CPAs & Business Advisors

COLLABORATE! 2022 Conference Agenda

May 19, 2022

7:30-8:15am — Registration and Breakfast

8:15-8:25am — Welcome

Michael Hoffner, Managing Partner, McKonly & Asbury

8:25-9:55am — **Keynote: Find a Way**

CPE: 1.5 Other

Merril Hoge, Former NFL Running Back and author of Find a Way: Three Words That Changed My Life

Merril Hoge is a former NFL running back and author of *Find a Way: Three Words That Changed My Life*. "Find. A. Way." Three simple words, yet when composed in a sentence, Merril Hoge has proven that these can be the most powerful words in the English language. "Find. A. Way." helped Merril beat cancer, overcome family tragedies, triumph childhood traumas, and conquer his personal demons.

A retired NFL running back and former ESPN analyst, Merril inspires audiences with his story of prevailing over life's hurdles through strength and determination while achieving success through hard work and perseverance.

In 2003, Merril was diagnosed with Non-Hodgkin's Lymphoma, which he fought – and beat – using the same tenacity he demonstrated on the field. Merril's empowering message provides people with strategies to "find a way" as they pursue their own goals.

9:55-10:15am — **Break**

10:15-11:15am — **Mergers and Acquisitions & Debt Capital Markets Update**

Citizens

CPE: 1.0 Other

Dan Fitzpatrick, President of Citizens Bank's Mid-Atlantic Region

Dan will be providing business owners and finance leaders with a review of mergers and acquisitions (M&A) activity in 2021 and an outlook for 2022, with a special emphasis placed on middle-market companies. This presentation will also include a high-level discussion of strategies employed in successful mergers, unexpected pitfalls that have caused deals to fail, and insight into key motivators for sale or acquisition of companies. Owners and financial leaders alike will receive actionable insights for successful acquisition, divestiture, or sale strategies. Additionally, Dan will give an update on the debt capital markets and how business owners and operators are accessing these markets in their M&A strategies.

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11:20am-12:10pm **Morning Breakouts**

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CPE: 1.0 Tax

Tax Update

Mark Heath, Partner, McKonly & Asbury

The past few years have seen numerous changes to every aspect of the tax landscape causing confusion and frustration for many. Mark will focus on federal, state, and personal taxes in this session, providing an overall summary of where things stand today as well as what changes are expected.

BRIDGEFORD
Trust Company
CPE: 1.0 Other

Modern U.S. Trust Law: Asset Protection and Privacy in a Transparent World

David Warren, Co-Founder and Chairman of the Board, Bridgeford Trust Company

As U.S. and global information disclosure regimes proliferate in the wake of the Pandora Papers and other massive data leaks, using trusts in top-tier U.S. trust jurisdictions to obtain privacy and asset protection has never been more urgent for wealthy families around the world. This presentation will discuss: 1) the Pandora Papers and other massive international data breaches and their impact on government regulation as well as calls for greater urgency around transparency in the financial services industry; 2) information disclosure requirements, both domestically and internationally, with a discussion around the Corporate Transparency Act, FATCA, and CRS; 3) the U.S. emergence as a privacy and asset protection haven for domestic and international families, as well as modern trust law planning tools available to families and their advisors; and 4) a comparison of "top-tier" U.S. trust jurisdictions and the vital importance of selecting the proper trust jurisdiction under current statutory guidance and emerging case law.

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CPE: 1.0 A&A

Risks to Nonprofit Organizations: What You Need to Know

Jim Shellenberger, Partner & David Hammarberg, Partner, McKonly & Asbury

There is a growing series of risks affecting the nonprofit community, and whether you work for a nonprofit organization or volunteer on a board of directors, it is important to be aware of these risks and how they are affecting nonprofit organizations. In this session Jim and Dave will use real-life case studies to highlight these dangers and important warning signs to look for. Importantly, they will also provide best practices that organizations can implement around fraud prevention, cybersecurity, improving internal controls, and risk assessment. Come prepared with your questions as Jim and Dave facilitate what is sure to be a lively discussion!

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11:20am-12:10pm — **Morning Breakouts, cont.**

Don't Let Your Business Run You! Get a Grip on Your Business.

Ross Foca, Certified EOS Implementer, EOS Worldwide

CPE: 1.0 Other

Are you a business owner or executive who wants to see your business consistently run better and grow faster? Ross will deliver a powerful, inspirational presentation that will introduce you to the Six Key Components™ of a successful business.

Ross's interactive style and experience-based, real-world insight makes this an eye-opening event for growth-oriented business leaders.

At the conclusion of this workshop, you will walk away with a set of simple, practical tools that you and your leadership team can use immediately to focus on priorities, get clear on issues, and gain traction together, becoming a healthier and more effective leadership team.

12:15-1:00pm — **Lunch**

1:10-2:10pm

No Time to Buy

Dr. Anirban Basu, Chairman & CEO of Sage Policy Group, Inc.

CPE: 1.0 Other

Will 2022 usher forth a return to normalcy or will it represent a continuation of the life-altering circumstances that characterized 2020 and 2021? Anirban will bring his entertaining style to an action-packed presentation that features an in-depth analysis of the economy's shifts during the pandemic, with an analysis of international, national, and regional data. Further insights regarding specific industry sectors and implications for businesses and households will also be covered. In a similar vein, Anirban will blend past performance with current economic trends and indicators to provide his forecast for the year ahead.

2:10-2:30pm — **Break**

2:30-3:30pm

Employment Law and Employee Benefits Update

McNees

Renee Lieux, Chair of Employee Benefits & Executive Compensation Group & Abbegael Giunta, Labor and Employment and Public Finance & Government Relations Groups

CPE: 1.0 Other

In the first half of this presentation, Abbe will discuss recent developments in all things COVID as well as wage and hour compliance and talent retention and recruiting. In the second half hour, Renee will review recent benefit law changes including the No Surprises Act's effect on health plans and a company's fiduciary obligations with respect to retirement plan investment choices.

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3:30-3:50pm **Break**

3:50-4:40pm **Afternoon Breakouts**

alliantgroup
CPE: 1.0 Other

Early Midterm Predictions and What They Mean for Your Business

Rick Lazio, Senior Vice President, Alliantgroup

With the midterm elections coming up, questions abound. What is the likelihood the House of Representatives flips as many are predicting? What could it mean to business owners, especially the small and mid-sized companies that make up the backbone of Central PA's economy? Join former U.S. Congressman Rick Lazio as he brings his early predictions and insightful perspectives to this breakout session. Rick will share what he is seeing and hearing on Capitol Hill, weighing in on the elections, taxes, trade, the economy, and more.

simpLEASE Accounting
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CPE: 1.0 A&A

ASC 842 and More - What You Need to Know Now

Brett Bauer, Principal & Timothy Showers, Manager, McKonly & Asbury
Jason Reljac, Manager, Schneider Downs Technology Advisors Group

With ASC 842 having gone into effect on January 1, 2022, the looming Lease Accounting Standard deadline is revealing to organizations just how prepared they are....or are not. Join McKonly & Asbury's Brett Bauer and Tim Showers, along with Jason Reljac, from Schneider Downs, as they share practical insights on challenges organizations are facing to adopt the new standard, both expected and unexpected. Included in this discussion will be an overview of strategies to avoid common pitfalls, actionable steps organizations can take to ensure they thoroughly address the requirements of the regulation while meeting the deadline, and the role technology can play in easing the burden of this requirement. The group will also provide an overview of additional accounting updates that are on the horizon.

Conrad Siegel
CPE: 1.0 Other

Managing Benefit Plans in 2022: 6 Common Mistakes and How to Avoid Them

Tara Mashack-Behney, Partner & President of Investment Advisory Services & James Pyne, Partner & Benefit Consultant & Scott Gehman, Retirement Plan Consultant, Conrad Siegel

Managing benefit plans has become increasing more difficult. The benefits landscape is always changing, and legislation over the last several years has impacted plans on a scale that we haven't seen since the early 2000s. Join us as we take a look at some of the most common benefit plan mistakes and how you (and your organization) can avoid them.

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3:50-4:40pm **Afternoon Breakouts, cont.**

Dale Carnegie

CPE: 1.0 Other

The Great Retention: Building Leadership Skills to Attract & Keep Great People

Carla Doyle, Managing Partner & Kristin Blain, Certified Instructor & Training Consultant

Great leaders understand the only way to get results is with and through other people. In the wake of the COVID pandemic, The Great Resignation has made one thing clear: Leadership Matters! For more than 100 years, Dale Carnegie has developed leaders, working in every major city in the United States and across 85 countries. Join Dale Carnegie Mid-Atlantic's Carla and Kristin for an interactive workshop, focused on developing actionable skills and strategies owners and other key organizational stakeholders can employ to create winning cultures, engaged teams, and organizations where creativity can flourish.

4:40-5:30pm **Closing Remarks and Reception**