

# McKONLY & ASBURY

## Collaborate 2018 Conference November 8, 2018

- 8:00AM - 8:30AM**      **Registration and Breakfast**
- 8:30AM - 8:40AM**      **Welcome**
- 8:40AM - 10:00AM**      **Keynote: A Discussion on the Need for Constant Innovation in the Cybersecurity Sector**  
Tom Ridge, first Secretary of Homeland Security and former Governor of PA and current Chairman of Cybersecurity and Technology at alliantgroup  
*1.5 Specialized Knowledge CPE Credits*  
In today's environment, businesses need to stay ahead of malicious trends and cyberattacks and this requires the need for constant innovation in the cybersecurity sector. During his discussion, Governor Ridge will explain how interconnected devices through the IoT have created points of vulnerability within not only businesses but the United States government. Governor Ridge will review this increased threat, as well as steps necessary to ensure your business does not fall victim to a cyberattack.
- 10:00AM - 10:15AM**      **Break**
- 10:15AM - 11:15AM**      **Mergers & Acquisitions Market Update**  
David Dunstan, President & Managing Director of Western Reserve Partners, a division of Citizens Capital Markets  
*1 Specialized Knowledge CPE Credit*  
Strong equity markets, record levels of liquidity, attractive multiples and a generational shift taking place in middle market company ownership is driving many owners of businesses to contemplate some type of M&A transaction. For financial managers of middle market companies, understanding the dynamics of the market and devising and executing successful strategies is becoming an increasing part of their role. David will be presenting an overview of the current mergers and acquisitions environment and deal activity in the US and Pennsylvania and by industry sector. The presentation will also include select industry deal activity and multiples and a focus on how business owners and managers can prepare for a sell-side or sell-side transaction.
- 11:15AM - 12:15PM**      **Market & Economic Overview**  
Josh Hirt, Investment Analyst with Vanguard Investment Strategy Group  
*1 Specialized Knowledge CPE Credit*  
A lot's happened in 2018 that has created a bumpy start to financial markets — Congress passed tax cuts, oil and other commodity prices trended higher, the United States pulled out of the Iran nuclear accord, negotiations over North Korea's denuclearization advanced in fits and starts, political risks in Europe increased, and trade tensions heated up across much of the world. Vanguard Senior Economic Analyst, Josh Hirt, will give an overview on the overall economy and an update on how Vanguard's outlook has evolved against this backdrop.
- 12:15PM - 1:00PM**      **Lunch**

# McKONLY & ASBURY

## Collaborate 2018 Conference November 8, 2018

**1:00PM - 1:50PM**

### **BUSINESS TRACK**

#### **National and Local Healthcare Benefit Trends and Practices**

Rob Glus, Partner and Consulting Actuary at Conrad Siegel

*1 Specialized Knowledge CPE Credit*

This presentation will look at local health and welfare benefit plan trends and practices for employer sponsored health plans. Using our own benefits survey information and other credible sources, we will examine the most prevalent benefit plans and practices being offered among local and national employers. Rob's presentation will also highlight benefit trend changes in recent years as a direct result of healthcare reform mandates as well as those due to the evolution of employer plans.

### **TECHNICAL TRACK**

#### **Individual Wealth Tax Planning**

David Warren, Co-Founder and Chairman of the Board with Bridgeford Trust Company and Kurt Trimarchi, Managing Partner with McKonly & Asbury

*1 Tax CPE Credit*

This session will explore changes in the federal tax code that make state tax planning more compelling now than ever, even in a relatively low tax state like Pennsylvania. The discussion will include strategies to avoid state taxation on undistributed trust income and avoid state capital gains upon the sale of assets with low cost basis, such as a closely held business or public stock position.

### **NON-PROFIT TRACK**

#### **New Not-For-Profit Standards: It's Time to Get Prepared!**

Janice Snyder, Partner with McKonly & Asbury

*1 Accounting CPE Credit*

Is your organization ready for the 1-2-3 Punch of new accounting standards? They come consecutively and with a vengeance... NFP Financial Reporting, Revenue Recognition and Leases! This session will focus on the first two standards: Not-For-Profit Financial Reporting and Revenue Recognition.

**1:50PM - 2:00PM**

**Break**

# McKONLY & ASBURY

## Collaborate 2018 Conference November 8, 2018

2:00PM - 2:50PM

### **BUSINESS TRACK**

#### **Modern Finance**

Mike Yeager, Chief Financial Officer with Cargas

*1 Specialized Knowledge CPE Credit*

Accounting Professionals' contributions to their organizations are limited because of the restrictions of their financial systems. With the advent of cloud technology, the profession is now a major contributor to business strategy, tasked with predicting future results instead of reporting historical information. Data entry is being eliminated, and now we have Finance Superheroes, who provide key insights into the business with speed and accuracy. This presentation will take a look at the cloud tools available today that can improve the contributions of the CFO and Controllers in your organization.

### **TECHNICAL TRACK**

#### **Business Tax Planning – The Implementation of Tax Reform**

Mark Heath, Partner and Michael Eby, Senior Manager with McKonly & Asbury

*1 Tax CPE Credit*

The Tax Cut and Jobs Act made sweeping changes to the income tax landscape for businesses in the United States. This session will focus on which of these changes will affect your business most and how you can take advantage of them, as well as how to better predict your Federal income tax liability for 2018 and the years ahead.

### **NON-PROFIT TRACK**

#### **Standards Update and the Form 990**

Janice Snyder and Gary Dubas, Partners with McKonly & Asbury

*0.5 Accounting CPE Credit and 0.5 Tax CPE Credit*

This session will focus on new accounting standards updates, including leases, and changes to standards in the future. The presenters will also address key areas to focus on when reviewing your Form 990.

2:50PM - 3:00PM

### **Break**

3:00PM - 4:00PM

### **Business Litigation and How to Take Preventive Measures**

Dean Piermattei, Principal at Pillar+ Aught

*1 Specialized Knowledge CPE Credit*

This session will address the common business mistakes that appear in business litigation matters. The perspective of the presentation is from hindsight, however, as it is intended to help businesses avoid common mistakes that often lead to costly litigation. Some of the topics addressed will include: key considerations when entering into contracts, including arbitration versus proceeding directly to court; attention to seemingly minor details that can save money in legal proceedings down the road; understanding that the handshake deal is a thing of the past and everything you put in writing can and will be used against you.

4:00PM - 5:00PM

### **Closing Remarks and Reception**