

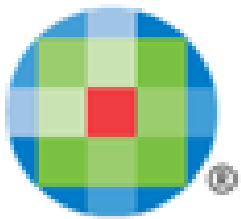
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## WEBCASTS

# CPE Webinar Dec. 15, 2021 — Looking Ahead: 2022 and Beyond Accounting Firm Technology Preview

Nov. 08, 2021



Wolters Kluwer

**This event was originally held on December 15, 2021 and is now available for on demand viewing. This archived version no longer qualifies for CPE, but please click below to register and view the event**

**Sponsor:** Wolters Kluwer

**Duration:** 1 Hour

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The latest technologies are making it easier for firms to adapt to the rapid pace of change and handle increased pressures in the accounting profession. With the right technology in place, firms can overcome these widespread challenges and achieve competitive advantage. In this 1-hour web seminar, technology leaders from Wolters Kluwer Tax & Accounting will discuss the technology developments to look out for next year and beyond, including:

- How APIs are helping firms connect and transform their technology investments
  - The latest workflow solutions helping firms increase capacity and create room to grow
  - Data-driven audit tools that will automate processes and provide deep insights
- Make technology infrastructure a part of your strategic planning for 2022 and beyond. Register today!

**Program level: Basic (no prerequisites required).**

**Field of Study:** Information Technology

**Receive 1 hour of free CPE credit for participating in this live webcast.**

**Presented by:**



**Rod Lear**

**Technical Product Manager**

**US Professional Market**

**Wolters Kluwer Tax & Accounting**

Rod Lear is a Technical Product Manager for Wolters Kluwer, Product Management. Since joining Wolters Kluwer in 2003, Rod spent 11 years within the support organization providing tax and technical support to National and Strategic customers. He spent 5 years supporting CCH Axxess Open Integration and consulting with a wide range of customers on how they could leverage the integration within their firms.



**Lisa Erickson**

**Product Line Manager, US Professional Market**

**Wolters Kluwer Tax & Accounting**

Lisa Erickson, CPA, is the Product Line Manager at Wolters Kluwer responsible for

driving product strategy, development, innovation, sales, and retention of firm management solutions for Tax and Accounting Professionals. She has over 20 years of experience of delivering innovative tax and accounting software solutions around the globe.



**Stefan Davis**

**Product Owner, US Professional Market  
Wolters Kluwer Tax & Accounting**

Stefan is the co-founder of TeamMate Analytics and an expert on the application of Data Analytics to Audit. He started his career with KPMG in the UK, working in External and Internal Audit for a huge range of clients. As the product owner for TeamMate Analytics, Stefan works with customers around the world to help them implement and apply analytics in their audit functions, and develop easy-to-use solutions to their challenges.



**Moderator: Isaac O'Bannon**

**Managing Editor  
CPA Practice Advisor**

Isaac M. O'Bannon is the managing editor and digital content manager for *CPA Practice Advisor* ([www.CPAPracticeAdvisor.com](http://www.CPAPracticeAdvisor.com)), drawing on two decades of experience covering the areas of professional accounting, taxation, business productivity and consumer technologies. Prior to *CPA Practice Advisor*, Isaac was a consultant at firms in San Francisco, Denver and Tulsa, serving clients that included Logitech, Polycom, Hilti, Microsoft, the Stanford Research Institute, the University of Oklahoma's College of Engineering and other technology leaders. He is a U.S. Navy veteran.

**This FREE online seminar is a continuation of the magazines' mission to provide unbiased, independent information on technologies available to practicing public accountants and tax professionals.**

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