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SERVICES, and TAX

Accounting thought leaders convened in New York City Feb. 20-22, 2023, for CPA Practice Advisor's 13th annual Accounting Thought Leader Symposium.


Isaac M. O'Bannon • Feb. 21, 2023



Nearly 30 of the most influential consultants, practitioners and accounting technology visionaries convened in New York City Feb. 20-22, 2023, for *CPA Practice Advisor's* 13th annual Accounting Thought Leader Symposium.

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CPA Practice Advisor editor-in-chief Gail Perry, CPA, leads discussion with attendees at the 2023 Accounting Thought Leader Symposium.

The annual event, hosted by *CPA Practice Advisor* (www.CPAPracticeAdvisor.com), fosters communication and expansion on the evaluation of technologies, practices and external influences that are shaping professional services, as well as firm and client success.



Roman Kepczyk, CPA, CITP, CGMA.

Participants came from across the U.S. as well as Taiwan and Australia. They represent a broad spectrum of the accounting profession including small tax-focused firms, general practices, national firms, corporate accountants, accounting educators, accounting technology consultants, and technologists, and all are well-known speakers at tradeshow and CPE events.

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Jim Bourke, CPA, CGMA.

Follow the Twitter hashtag #CPATLS
(<https://twitter.com/hashtag/CPATLS>) for the ongoing conversation about the Thought Leader Symposium.



Jennifer Lee Wilson of ConvergenceCoaching

During the symposium, these professionals will meet with core development and executive staff of key accounting technology providers to determine and shape the future of the profession, including both short- and long-term evolutions in technology, workflow methods, and firm management.

2023 Accounting Thought Leader Symposium Agenda

Agenda items are initially kept general, so that dialogues, challenges, disagreements, and new avenues of thought can be explored as they develop organically.

However, some areas of general guidance, as they pertain to accounting and tax pros,

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Brian Tankersley, CPA.CITP, CGMA.

- AI transformation
- New trends in advisory services
- DEI
- ESG
- Higher education
- Staffing issues
- Firm structure
- Data security/privacy
- Technology solutions, best-suite vs. best-of-breed



Rick Telberg, founder of CPA Trendlines.

To further guide potential discussions on these vast topics, the attendees were encouraged to focus the direction on the following perspectives:

- What is changing or what changes do attendees anticipate in the above areas;

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Attendees included:

Jason Blumer	CPA
Jim Boomer	CPA.CITP
Jim Bourke	CPA.CITP, CFF, CGMA
David Cieslak	CPA.CITP, CGMA, GSEC
Joey Havens	
Michael Hsu	CPA, CGMA
Angie Grissom	CPA.CITP
John Higgins	CPA.CITP, CGMA
Tom Hood	CPA.CITP
Kacee Johnson	MBA
Randy Johnston	
Roman Kepczyk	CPA.CITP, CGMA, LSS BB
Mark Koziel	CPA, CGMA



Technologist Randy Johnston of NMGI and K2 Enterprises.

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Rick Telberg	
Sandra Wiley	
Jennifer Wilson	

- *CPA Practice Advisor thanks the following technology companies for helping make the 2023 event a success: Corvee, Avalara, Zoho and Withum.*

Additional guests and speakers included:

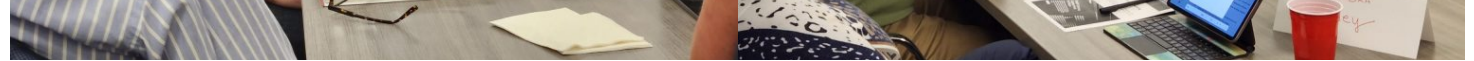
- Andrew Argue, CPA (Corvee)
- Sarah Schariest (Corvee)
- Sona Akmakjian, CPA (Avalara)
- Brian Austin (Avalara)
- Becky Livingston (Speaker, Penheel Marketing)
- Nathan Rodgers (Zoho)
- Val Steed, CPA (Zoho)
- Pat Walsh, CPA (Withum)

CPA
Practice **Advisor**

THOUGHT 
LEADER
SYMPOSIUM **2023**

Photo Gallery:





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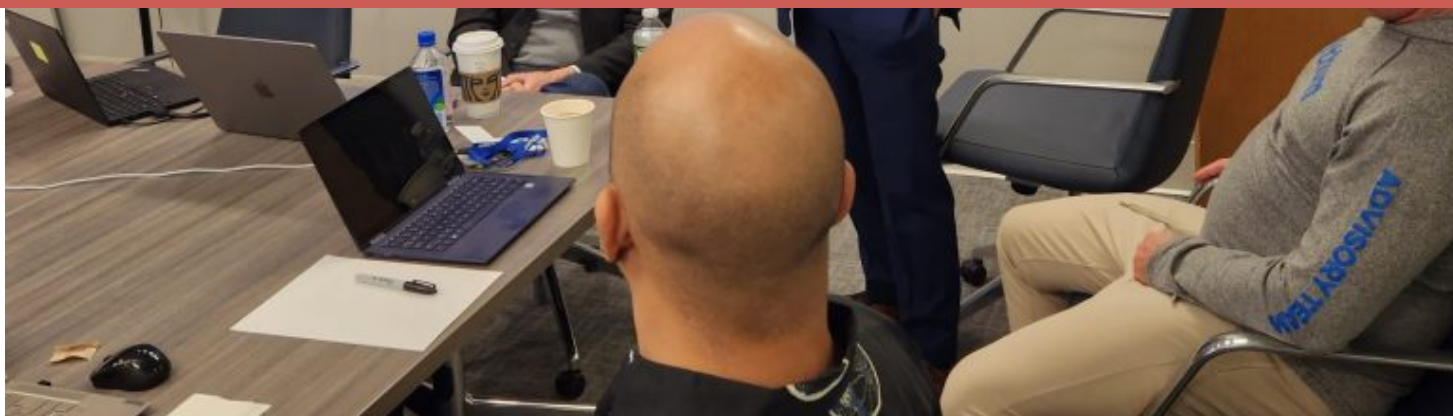
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CPA Practice Advisor has provided accounting and tax professionals with firm management and technology guidance, reviews, expert commentary, educational opportunities, and a variety of print and digital resources for more than 30 years.

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