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CONFERENCE

Over two days and 14 one-hour sessions, the profession's top thought leaders served on panel discussions of a variety of subject areas related to tax, accounting, practice management and ethics.

Isaac M. O'Bannon • Dec. 09, 2023



Ensuring Success, the largest live-streamed CPE conference for accounting and tax professionals, was held December 6-7, providing these financial and tax advisors the

opportunity to complete their credential requirements, and also offering strategies

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On the first day of the event (Dec. 6, 2023), the CPE sessions included tax-related ethics, firm management, small firm strategies for tax credits, 2023-24 tax season issues, digital assets, firm branding/marketing, and practical AI uses for accountants.

On day two (Dec. 7, 2023), session topics included data security risks for firms, e-commerce accounting, spend management advisory services, big data, firm growth strategies, tax audit resolution issues, and firm transformation.

The annual Ensuring Success event will be offered again in December 2024. (Tentative dates are Dec. 5-6, 2024, but this is subject to change.) The 2024 event will also offer professionals the opportunity to earn up to 14 hours of CPE credit.

CPA Practice Advisor is able to offer this free CPE credit event thanks to the participation of its sponsors:

ADP	Avalara	Botkeeper
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Relay	Rightworks	SafeSend
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Attendees of the free, live streaming sessions were able to earn CPE credit. Recorded versions of all 14 CPE sessions will be available online soon at <https://www.ensuringsuccess.com>. However, only attendees of the live event had the opportunity to receive CPE credit. Professionals can register for the 2024 event soon at the same website.

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Session 1: Alexandra DeFelice, Cory Barwick, Brian Fox, DiAndria Green and Gail Perry discuss tax ethics issues. Session sponsored by Avalara.



Session 2: Alexandra DeFelice, Jeff Phillips, Joey Havens, Al-Nesha Jones and Gail Perry discuss firm management issues

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Session 3: Alexandra DeFelice, Nadia Rodriguez, Brandi Price, Marcus Dillon and Gail Perry discuss tax credit topics faced by small firms. Session sponsored by ADP.



Session 4: Alexandra DeFelice, Andrew Argue, James Rainwater, Lucia Valenzuela and Gail Perry discuss tax issues for the 2024 filing season. Session sponsored by Corvee.

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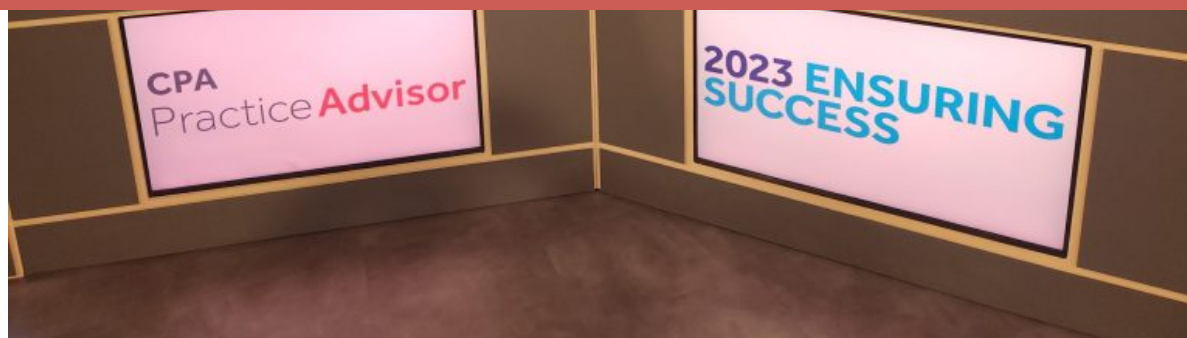
Session 5: Alexandra DeFelice, Dr. Sean Stein Smith, Mackenzie Patel and Gail Perry discuss digital asset accounting and tax issues.



Session 6: Alexandra DeFelice, Gaynor Meilke, Becky Livingston, Geni Whitehouse and Gail Perry discuss marketing and branding issues.

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Session 7: Alexandra DeFelice, Andrew Hatfield, Garrett Wagner, David Cieslak and Gail Perry discuss how accounting and tax pros can effectively use AI in their firms. Session sponsored by SafeSend.

Day Two Topics and Studio Images:



Ensuring Success session 8 on Data Security for accounting firms, sponsored by [Rightworks](#), with Randy Johnston, Roman Kepczyk and Dave Cieslak, with hosts Alexandra DeFelice and Gail Perry.

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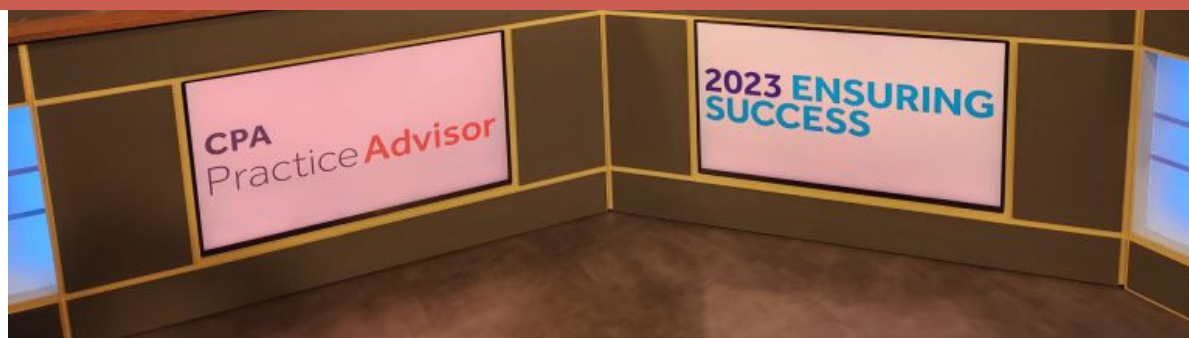
Session 9 on e-commerce accounting, sponsored by [Xero](#), with Alexandra DeFelice, Aaron Berson, Annie Terry and Wayne Richard, and host Gail Perry.



Ensuring Success session 10 on Approachable Advisory and Spend Management, sponsored by [CPA.com](#), with Alexandra DeFelice, Gail Perry, Jayson Brannon, Michael Ly and Sean Duncan.

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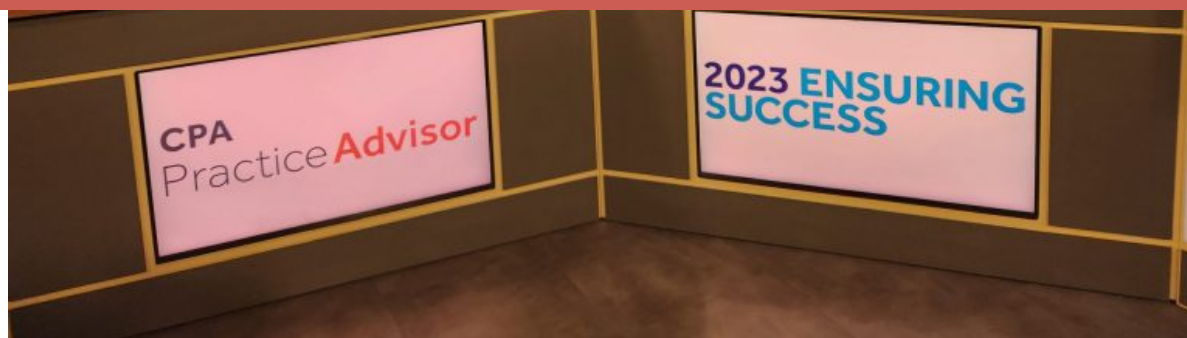
Session 11: Alexandra DeFelice, Donny Shimamoto, Enrico Palmerino, Jim Bourke and Gail Perry Big Data and what accountants need to know. Session sponsored by [BotKeeper](#).



Session 12: Hosts Gail Perry and Alexandra DeFelice were joined by Cathy Rowe, Andy Root and Sean Duncan for a discussion on “How to grow, scale, and elevate” modern accounting firms. Sponsored by [Wolters Kluwer](#).

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Session 13: Hosts Gail Perry and Alexandra DeFelice were joined by Vaughan M. Long, Tanya R. Baber, and Nicole Davis, for a discussion on tax resolution issues. Session sponsored by [Canopy](#).



Session 14: Hosts Gail Perry and Alexandra DeFelice were joined by CPAs Roman Kepczyk, Sean Duncan and Geni Whitehouse, for a session focused on business and firm transformation. "From irrelevant to irreplaceable." Session sponsored by [ZOHO](#).

More images and coverage of the event are coming soon from *CPA Practice Advisor* at

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