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The Thought Leader Symposium is hosted by CPA Practice Advisor, a news, technology and practice management resource for public accounting firms and tax and financial professionals.

Isaac M. O'Bannon • Feb. 21, 2024



More than 20 of the accounting profession's thought leaders convened in Dallas on February 20, 2024, for three days of discussions and panels focused on the key trends and most significant challenges currently faced by professionals and firms, as well as

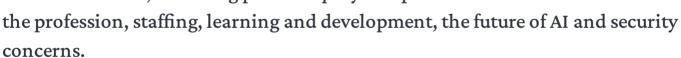
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The initial discussion topic focused on how human nature is to adapt to overcome constraints on resources. While this has been studied at length by sociologists, the principles apply with regard to the ability of humans to use technologies to overcome more practical resource and productivity management issues. The discussion guided by Ed Kless, the senior director of partner development and strategy at Sage.

Now in it's 15th year, the Thought Leader Symposium is hosted by *CPA Practice Advisor*, a news, technology and practice management resource for public accounting firms and tax and financial professionals.

Over the course of the event, the group will discuss additional issues, including private equity's impact on



This year's annual event is sponsored by Avalara, Sage, Wolters Kluwer and Zoho, and includes interactive group and breakout sessions.





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The invitation-only event is being held Feb. 20-22, 2024, at the Hilton Dallas Lincoln Centre.

# 2024 Thought Leaders

Aaron Berson, CPA

Jason Blumer, CPA

Gary Boomer, CPA

David Cieslak, CPA

Angie Grissom, CPA

John Higgins, CPA

Al-Nesha Jones, CPA

Roman Kepczyk, CPA

Allan Koltin, CPA

Michelle Golden River, CPF

Brian Tankersley, CPA

Garrett Wagner, CPA

Geni Whitehouse, CPA

Sandra Wiley

## **Special Guest**

Eric McMillen

## **Sponsors Attending**

Ed Kless – Sage

Sona Ackmakjian, CPA – Avalara

Shahbaz Kahn – Wolters Kluwer

Cathy Rowe - Wolters Kluwer

Nathan Rodgerson – Zoho

Val Steed, CPA – Zoho

CPA Practice Advisor Staff

Barry Strobel – Publisher

Gail Perry, CPA – Editor-in-Chief

Isaac M. O'Bannon – Managing Editor

Jason Bramwell – Sr. Staff Writer

Accounting • Firm Management • Technology

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