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Professional Challenges

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 the profession, staffing, learning and development, the future of AI and security concerns.

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 Rodgers – Zoho
Val Steed, CPA – Zoho

CPA Practice Advisor Staff

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Jason Bramwell – Sr. Staff Writer

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