



SESSION CATALOG

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How to Use This Catalog

This catalog lists breakout sessions at Scaling New Heights 2026, organized by day and time. Concurrent sessions appear side by side so you can plan your day at a glance. Color-coded tracks help you quickly spot the content path that fits your goals.

Tracks

- Practice Strategy & Advancement
- Technical Training: General Ledger
- Technical Training: AI & Technology
- Tax Advisory & Representation

What's Inside

Breakout Sessions: 101 sessions across four days, grouped by time slot so you can see every concurrent option at a glance.

Explore Training in the Exhibition Hall: Group Meetups, Woodard Theater Sessions, and Walking Tours pulling double duty as networking and learning opportunities.

Schedule subject to change. Refer to the official mobile app for real-time updates, room assignments, and session changes.

Conference Center Map



SUNDAY

JUNE 14

21 SESSIONS 3 TIME SLOTS

■ Practice Strategy & Advancement ■ AI & Technology ■ General Ledger ■ Tax Advisory & Representation

12:00 PM

PRACTICE STRATEGY BREAKOUT 10 Steps for Building High-Performance Teams <i>Terrell Turner</i>	PRACTICE STRATEGY BREAKOUT How to Pick the Right Tech When Everything Looks Shiny <i>Liz Mason</i>	PRACTICE STRATEGY BREAKOUT How to Stand Out with a Unique Brand in a Traditional Industry <i>Keila Hill-Trawick</i>	PRACTICE STRATEGY BREAKOUT Profitability First, Tech Second: Helping Clients Optimize Processes Before Picking Tools <i>Stephanie E. Clark</i>
PRACTICE STRATEGY BREAKOUT The Anti-Burnout Tech Stack: Tools That Give You Your Life Back <i>Kelly Gonsalves</i>	TAX ADVISORY BREAKOUT How the IRS Is Using AI <i>Eric Green, Damon Rowe</i>	AI & TECHNOLOGY BREAKOUT Bigger Data: Turning Chaos into Clarity with AI and BI <i>Mario Nowogrodzki</i>	

1:10 PM

PRACTICE STRATEGY BREAKOUT Accountant vs. CFO: The Partnership Every Business Needs <i>Dave Kersting</i>	PRACTICE STRATEGY BREAKOUT From Transactional to Transformational: Self-Leadership and Soft Skills for the Future-Ready Advisor <i>Mariette Martinez</i>	PRACTICE STRATEGY BREAKOUT Keeping Score in Marketing: Simple Metrics That Show What's Working <i>Chris Hendrix</i>	PRACTICE STRATEGY BREAKOUT Match the Skills to the Steps: AI Assisted SOPs that Scale Firm Operations and Client Deliverables <i>Kristy Monahan</i>
PRACTICE STRATEGY BREAKOUT The Strategic Client Onboarding Playbook <i>Deborah Defer</i>	TAX ADVISORY BREAKOUT When the IRS Bot Comes Knocking: Responding to Automated Enforcement <i>Eric Green</i>	AI & TECHNOLOGY BREAKOUT Storytelling with AI: Turning Numbers into Client Narratives <i>Mario Nowogrodzki</i>	

<p>PRACTICE STRATEGY</p> <p>WORKSHOP</p> <p>Red Flags & Paper Trails: A Fraud Accounting Workshop</p> <hr/> <p><i>Robert Nordlander, Candy Bellau</i></p>	<p>PRACTICE STRATEGY</p> <p>BREAKOUT</p> <p>Customizing Your Client Automation to Increase Engagement & Upsell Premium Services</p> <hr/> <p><i>Brad Messner</i></p>	<p>PRACTICE STRATEGY</p> <p>BREAKOUT</p> <p>From Bookkeeping to Controllership</p> <hr/> <p><i>Heather Satterley</i></p>	<p>PRACTICE STRATEGY</p> <p>BREAKOUT</p> <p>Ideal Clients Aren't Found; They're Built.</p> <hr/> <p><i>Tony Proctor</i></p>
<p>TAX ADVISORY</p> <p>BREAKOUT</p> <p>Better Together: How Tax & CAS Synergy Builds Unbreakable Client Bonds</p> <hr/> <p><i>K.C. Eames, Megan Leesley</i></p>	<p>GENERAL LEDGER</p> <p>BREAKOUT</p> <p>Introduction to Intuit Enterprise Suite</p> <hr/> <p><i>Megan Bronson</i></p>	<p>GENERAL LEDGER</p> <p>BREAKOUT</p> <p>Tech Update: Navigating What's Next</p> <hr/> <p><i>Randy Johnston</i></p>	

- Practice Strategy & Advancement
- AI & Technology
- General Ledger
- Tax Advisory & Representation

7:00 AM · Power Breakfast

<p>PRACTICE STRATEGY POWER BREAKFAST</p> <p>Beyond the Books: How EOR Helps Accountants Power Client Growth Across Borders</p> <hr/> <p><i>Presenter TBA</i></p>	<p>PRACTICE STRATEGY POWER BREAKFAST</p> <p>Building a Marketing Plan You Will Actually Execute</p> <hr/> <p><i>Apoorv Dwivedi</i></p>	<p>PRACTICE STRATEGY POWER BREAKFAST</p> <p>Leading the Modern Firm: How to Stay in Control as Technology Accelerates</p> <hr/> <p><i>Dawn Brolin</i></p>	<p>PRACTICE STRATEGY POWER BREAKFAST</p> <p>The Death of the Clock: Pricing in the Age of AI</p> <hr/> <p><i>Ron Baker</i></p>
<p>PRACTICE STRATEGY POWER BREAKFAST</p> <p>The Great Compression: Why Firms Built for Performance Break Under Stress, and How to Design for Pressure</p> <hr/> <p><i>Elad Shmilovich</i></p>	<p>TAX ADVISORY POWER BREAKFAST</p> <p>OBBB: Scaling Tax Credits with Stronger Tax Compliance & Artificial Intelligence</p> <hr/> <p><i>Michael A. Smith</i></p>	<p>TAX ADVISORY POWER BREAKFAST</p> <p>Streamlining IRS Representation Workflows with RepWorks</p> <hr/> <p><i>Eric Green</i></p>	

8:00 AM · Power Breakfast

<p>PRACTICE STRATEGY POWER BREAKFAST</p> <p>Calm, Not Chaos: A Practical Approach to Business Risk</p> <hr/> <p><i>Tiffany Caponigro</i></p>	<p>PRACTICE STRATEGY POWER BREAKFAST</p> <p>Elevating the Modern Accounting Firm: Accurate Books. At AI Speed.</p> <hr/> <p><i>Sasha Orloff</i></p>	<p>PRACTICE STRATEGY POWER BREAKFAST</p> <p>From Systems to Scale: Building a 7-Figure Modern Accounting Firm</p> <hr/> <p><i>Manuel "Manny" Cosme</i></p>	<p>AI & TECHNOLOGY POWER BREAKFAST</p> <p>A Strange New World: Accountable Intelligence</p> <hr/> <p><i>Tyler Palmerton</i></p>
<p>AI & TECHNOLOGY POWER BREAKFAST</p> <p>AI With Accountability: Scaling Innovation Without Losing Control</p> <hr/> <p><i>Nigel Reiff</i></p>	<p>AI & TECHNOLOGY POWER BREAKFAST</p> <p>Inside the AI-Powered Firm: An Honest Conversation About AI, Growth, and What Actually Works</p> <hr/> <p><i>Presenter TBA</i></p>	<p>PRACTICE STRATEGY POWER BREAKFAST</p> <p>Rethinking Bookkeeping Capacity for the AI-Native Firm</p> <hr/> <p><i>Conrad Wadowski</i></p>	

1:00 PM

PRACTICE STRATEGY

BREAKOUT

Build Once, Use Everywhere: Designing Processes That Survive Real Work

Brandy Jordan

PRACTICE STRATEGY

BREAKOUT

GEO is the New SEO: How to Get Found, Cited and Trusted

Amy Juers

PRACTICE STRATEGY

BREAKOUT

Lead Conversations That Change Everything

Lamont Nesbitt

TAX ADVISORY

BREAKOUT

A Strange New World of Taxes: Elevating Client Experiences Through Smarter Workflows

Ericka S Williams

AI & TECHNOLOGY

BREAKOUT

AI 101 - Getting Started with Artificial Intelligence for Accountants

Randy Johnston

AI & TECHNOLOGY

BREAKOUT

From Prompts to Personality: Building Your AI Voice for Client-Ready Workflows

Jan Haugo

GENERAL LEDGER

BREAKOUT

Advanced Tools and Reporting in Intuit Enterprise Suite

Megan Bronson

5:20 PM

PRACTICE STRATEGY

BREAKOUT

Driving Transformation: Guiding Teams and Clients Through Change

Ashley Rhoden

PRACTICE STRATEGY

BREAKOUT

From Doer to Leader: Redefining the Owner's Role in CAS

Emily Cheshire

PRACTICE STRATEGY

BREAKOUT

Think Before You Click: Outsmarting Scammers in the Digital Age

Jamie Pollock

TAX ADVISORY

BREAKOUT

Breaking the Tax Season Cycle: How One Firm Transformed Workloads, Clients, and Culture

*Bonnie Buol Rusczyk,
Jennifer Mitchell*

AI & TECHNOLOGY

BREAKOUT

AI 102 - Better Prompts, Better Results

Brian Tankersley

AI & TECHNOLOGY

BREAKOUT

Mining for Client Value: Using ChatGPT to Decode Client Behavior

Astrid Galvez

GENERAL LEDGER

BREAKOUT

Level Up with Xero: Explore the Latest AI & Analytical Tools

*Sunny Farhat,
Aleisha Donald*

- Practice Strategy & Advancement
- AI & Technology
- General Ledger
- Tax Advisory & Representation

7:00 AM · Power Breakfast

<p>PRACTICE STRATEGY</p> <p>POWER BREAKFAST</p> <p>CFO Confessions: What Your Clients Actually Want from Advisory</p> <hr/> <p><i>Fady Hawatmeh</i></p>	<p>PRACTICE STRATEGY</p> <p>POWER BREAKFAST</p> <p>Charge What You're Worth: The Accounting Pricing Power Breakfast</p> <hr/> <p><i>Dawn Brolin</i></p>	<p>PRACTICE STRATEGY</p> <p>POWER BREAKFAST</p> <p>Payroll Is Personal: Maximize Your Client Conversations</p> <hr/> <p><i>Valerie Heckman</i></p>	<p>PRACTICE STRATEGY</p> <p>POWER BREAKFAST</p> <p>Pricing to Value: Workforce Advisory Strategies for the Modern Advisory Firm</p> <hr/> <p><i>Mike Triantos, Ron Baker</i></p>
<p>PRACTICE STRATEGY</p> <p>POWER BREAKFAST</p> <p>The Hybrid Firm 2026</p> <hr/> <p><i>Justin Hatch</i></p>	<p>TAX ADVISORY</p> <p>POWER BREAKFAST</p> <p>How AI is Eliminating the Hidden Risk in Your Clients' Books</p> <hr/> <p><i>Ryan Le</i></p>	<p>AI & TECHNOLOGY</p> <p>POWER BREAKFAST</p> <p>Practical AI in Tax Preparation</p> <hr/> <p><i>David Haase</i></p>	

8:00 AM · Power Breakfast

<p>PRACTICE STRATEGY</p> <p>POWER BREAKFAST</p> <p>Bill Accounts Payable - Live Certification</p> <hr/> <p><i>Jake Steadman</i></p>	<p>PRACTICE STRATEGY</p> <p>POWER BREAKFAST</p> <p>From Disconnected to Scalable: Building a Connected Ecosystem for Firm Growth</p> <hr/> <p><i>Beth Mickelson</i></p>	<p>PRACTICE STRATEGY</p> <p>POWER BREAKFAST</p> <p>Humans in the AI Loop - A Need or a Bottleneck?</p> <hr/> <p><i>Maanoj Shah</i></p>	<p>AI & TECHNOLOGY</p> <p>POWER BREAKFAST</p> <p>AI Can't Fix a Broken Tech Stack</p> <hr/> <p><i>Presenter TBA</i></p>
<p>GENERAL LEDGER</p> <p>POWER BREAKFAST</p> <p>Become a Frontier Firm: Prepare Clients for the Future with Microsoft Dynamics 365 Business Central</p> <hr/> <p><i>Peter Jakobsen, Jennifer Dorsey</i></p>	<p>GENERAL LEDGER</p> <p>POWER BREAKFAST</p> <p>Picking Your Platform Champion: Xero or QuickBooks Online?</p> <hr/> <p><i>Alicia Katz Pollock, Amanda Aguillard</i></p>	<p>GENERAL LEDGER</p> <p>POWER BREAKFAST</p> <p>The Dawn of Zero-Touch Accounting</p> <hr/> <p><i>Rob Hamilton</i></p>	

1:00 PM

PRACTICE STRATEGY

BREAKOUT

Converting Legacy Clients to Subscriptions: Practical Solutions to a Scary Process

Beth Whitworth

PRACTICE STRATEGY

BREAKOUT

Productivity by Design: Build a System That Fits Your Work & Energy

Kim Petro

PRACTICE STRATEGY

BREAKOUT

Who Should Do the Work? Designing Ideal Engagements with Onshore, Offshore, and Automation in Mind

Kane Polakoff

PRACTICE STRATEGY

BREAKOUT

Why Authenticity Matters

Shirley Koss

TAX ADVISORY

BREAKOUT

Protecting Your Clients from an IRS Audit: Strategies, Case Studies, and Best Practices

Ericka S Williams

AI & TECHNOLOGY

BREAKOUT

AI 301 - Strange New Operators: Building Workflow Agents

Randy Johnston

GENERAL LEDGER

BREAKOUT

Become Confident Using the NEW Banking Tools in QuickBooks Online!

Kathy Grosskurth

5:20 PM

PRACTICE STRATEGY

BREAKOUT

Exit Without Selling™: Advisory Strategies to Maximize Client Wealth

Tina McGill

PRACTICE STRATEGY

BREAKOUT

Modern Marketing Strategies for Accounting Firms: From AI to Trade

Terrell Turner

PRACTICE STRATEGY

BREAKOUT

The Cash Flow Commander: AP as an Advisory Superpower

Geni Whitehouse

PRACTICE STRATEGY

BREAKOUT

Upskilling for CAS: Building Professionals Who Think, Lead, and Own Like Controllers

Brittany Brown

TAX ADVISORY

BREAKOUT

Scaling Your Tax Practice in a New Era: Workflows, Technology, and Client Experience

Ericka S Williams

AI & TECHNOLOGY

BREAKOUT

AI 201 - Strange New Risks: Security and Privacy in an AI World

Brian Tankersley

GENERAL LEDGER

BREAKOUT

Automate the Boring Stuff: Workflows That Run While You Sleep

Kelly Gonsalves

■ Practice Strategy & Advancement ■ AI & Technology ■ General Ledger ■ Tax Advisory & Representation

8:00 AM · Power Breakfast

<p>PRACTICE STRATEGY POWER BREAKFAST</p> <p>From Chaos to Control: Modern Practice Management That Works</p> <p><i>Tim Sines</i></p>	<p>PRACTICE STRATEGY POWER BREAKFAST</p> <p>Reimagining Payroll: AI, Automation, and the Future of Firm Advisory</p> <p><i>Heather Spurduto, Dawn Brolin</i></p>	<p>PRACTICE STRATEGY POWER BREAKFAST</p> <p>Scale Your Practice, Not Your Payroll</p> <p><i>Jessica McKeller</i></p>	<p>PRACTICE STRATEGY POWER BREAKFAST</p> <p>Why “Profitable On Paper” Contractors Still Lose Money</p> <p><i>Tonya Schulte, Cam Garrant</i></p>
<p>TAX ADVISORY POWER BREAKFAST</p> <p>Demystifying the 401(k): The Top 10 Questions Most Clients Will Ask</p> <p><i>Marc Fowler, Aaron Wilson</i></p>	<p>GENERAL LEDGER POWER BREAKFAST</p> <p>Automating Data Capture for a Paperless Practice</p> <p><i>Lisa Beaver</i></p>	<p>PRACTICE STRATEGY POWER BREAKFAST</p> <p>The Good, Bad, and Ugly of Making AI a Reality for Accounting Teams</p> <p><i>Kevin Moore</i></p>	

1:00 PM

<p>PRACTICE STRATEGY BREAKOUT</p> <p>A Roadmap for Moving Your Team from Transactions to Advisory</p> <p><i>Jean Zick</i></p>	<p>PRACTICE STRATEGY BREAKOUT</p> <p>Brand Beyond The Logo</p> <p><i>Roman Villard</i></p>	<p>PRACTICE STRATEGY BREAKOUT</p> <p>Critical Thinking/Problem Solving</p> <p><i>Keith Fileccia, Mario Nowogrodzki</i></p>	<p>PRACTICE STRATEGY BREAKOUT</p> <p>Pods vs. Specialized Teams: Lessons Learned in Scaling Your Firm</p> <p><i>Lauren Maillard</i></p>
<p>AI & TECHNOLOGY BREAKOUT</p> <p>AI 202 - Strange New Workflows: Building an AI Strategy for Operations</p> <p><i>Randy Johnston</i></p>	<p>AI & TECHNOLOGY BREAKOUT</p> <p>AI App Consulting: Helping Clients Make Smarter, More Profitable, Sustainable Decisions</p> <p><i>Liz Scott</i></p>	<p>AI & TECHNOLOGY BREAKOUT</p> <p>Contingency Planning Using AI, Apps and Automation</p> <p><i>Kellie Parks</i></p>	

2:10 PM

PRACTICE STRATEGY

BREAKOUT

Develop Your Resiliency Mindset to Thrive During Constant Change

Alison Ball

PRACTICE STRATEGY

BREAKOUT

Handling Difficult Conversations with Language, Courage and Clarity for Accountants

Debra Kilsheimer

AI & TECHNOLOGY

BREAKOUT

AI + Websites: Turning Analytics into Traffic, Leads, and GEO Visibility in a Strange New World

Amy Juers

AI & TECHNOLOGY

BREAKOUT

Scaling Without Headcount: Designing the AI-First Firm of 2026

Jan Haugo

GENERAL LEDGER

BREAKOUT

QuickBooks 2026 & AI: Stay Current, Stay Secure, Stay Ahead

*Carrie Kahn,
Dan DeLong*

4:10 PM

PRACTICE STRATEGY

BREAKOUT

Automation With Heart: Intentionality in Human + Tech

Roman Villard

PRACTICE STRATEGY

BREAKOUT

Beyond the Bottleneck: Letting Go Without Losing Control

*Carla Caldwell,
Terri Warren,
Melissa Stout*

PRACTICE STRATEGY

BREAKOUT

Burnout-Proof Your Firm: How to Retain Mid-Level Leaders and Stop the \$250K Drain

Lauren Baptiste

PRACTICE STRATEGY

BREAKOUT

Vulnerability As A Strength: Building A More Resilient Firm in an Uncertain World

Nancy McClelland CPA

GENERAL LEDGER

BREAKOUT

Beyond QuickBooks: Smarter Systems for an AI-Driven World

Mario Nowogrodzki

Explore Additional Training in the Exhibition Hall

Including **Group Meetups**, **Woodard Theater Sessions**, and **Walking Tours***. Designed to help you connect, learn, and discover the tools shaping the strange new world of accounting.

* *Walking Tours are available exclusively to Scaling New Heights Plus registration holders.*

Exhibit Floor Map

Scaling New Heights 2026 – Orlando, Florida



Group Meetups Industry-specific networking · Meet-up area (near the Woodard booth)

Monday, June 15

10:50 AM
Financial Consultants/Coaches

12:25 PM
New Practice Owners

3:30 PM
Retail & eCommerce Aficionados

11:30 AM
Enrolled Agents

2:50 PM
Non-Profit Aficionados

Tuesday, June 16

10:50 AM
Distribution/Wholesale + Manufacturing Aficionados

12:25 PM
Podcasting Aficionados

3:30 PM
Financial Consultants/Coaches

11:30 AM
Healthcare Aficionados

2:50 PM
Non-Profit Aficionados

Wednesday, June 17

10:50 AM
Legal Industry Aficionados

11:30 AM
Builder and Contractor Aficionados

Woodard Theater Sessions 20-minute talks on Stage A & Stage B (at the Woodard booth)

Monday, June 15

11:00 AM **STAGE A**

From Stuck to Supported

Shirley Koss

11:40 AM **STAGE A**

Why Multitasking Is Killing Your Productivity

Kim Petro

12:20 PM **STAGE A**

The Strange World of Healthcare Accounting

Martha Yasso

3:20 PM **STAGE A**

What is My Practice Worth?

Todd Robinson

11:20 AM **STAGE B**

Press Record and Celebrate the Profession

Donna Reade

12:00 PM **STAGE B**

The Training Floor: Reps Over Intentions

Brandy Jordan

3:00 PM **STAGE B**

Set the Price or Pay the Price

Lamont Nesbitt

Tuesday, June 16

11:00 AM **STAGE B**

The Six Pillars of Agile Firm Culture: Insights from The Disruptors

Liz Farr

11:40 AM **STAGE B**

Set the Price or Pay the Price

Lamont Nesbitt

12:20 PM **STAGE B**

Build your first AI Agent in 5 steps

Kevin Lacey

3:20 PM **STAGE B**

Moving Beyond Bookkeeping: Forecasting to Show Your True Value

Michelle Vilms

11:20 AM **STAGE A**

Tear Down the Wall: Bookkeeper-Tax Pro Collaboration in a World of Automation

Nancy McClelland

12:00 PM **STAGE A**

Leading and Lagging Indicators: Predict Your Future

Alisa McGabe

3:00 PM **STAGE A**

How to Become a Speaker at Scaling New Heights

Heather Satterley

Wednesday, June 17

11:00 AM **STAGE A**

Radical Acceptance and Resilience as a Solopreneur

Meaghan Jackson

12:00 PM **STAGE B**

Hiring Hacks: Outsmart the Bot to Get to the Person

Beth Whitworth

11:20 AM **STAGE B**

What is My Practice Worth?

Todd Robinson

12:20 PM **STAGE A**

The Training Floor: Reps Over Intentions

Brandy Jordan

Walking Tours ★ Available to Scaling New Heights Plus Registrants Only

Curated, category-focused tours of the Exhibition Hall

GROUP A

GROUP B

Monday, June 15

11:00 AM

Income Tax Tools and Resources

Tour Guides: Hope Brown & Nancy McClelland

11:50 AM

Job Costing + WIP + Field Execution

Tour Guide: Tonya Schulte

2:50 PM

People Ops and Payroll

Tour Guide: Debra Kilsheimer

11:00 AM

Professional Alliances

Tour Guide: Jean Zick

2:50 PM

Professional Education Providers

Tour Guide: Michael McClellan

Tuesday, June 16

11:00 AM

Workflow Automation + Month End Close Automation

Tour Guide: Liz Scott

11:50 AM

Information Technology (IT) + Infrastructure

Tour Guide: Martha Yasso

2:50 PM

Inventory + Order Management

Tour Guide: Kevin Lacey

11:00 AM

AI-Enabled General Ledger Solutions

Tour Guide: Randy Johnston

11:50 AM

Practice Management

Tour Guide: Donna Reade

2:50 PM

Accounts Payable + Spend Management

Tour Guide: Dave Kersting

Wednesday, June 17

11:00 AM

Proposals, Revenue, and Accounts Receivable

Tour Guide: Melissa Miranda

11:50 AM

Outsourcing + Staffing Partners

Tour Guide: Vanessa Vasquez

11:00 AM

Financial Reporting and Business Intelligence

Tour Guide: Tina McGill

11:50 AM

Regulatory Compliance Solutions and Services

Tour Guide: Vicki Henry