



Accounting & Financial Women's Alliance  
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The Association of  
Accountants and  
Financial Professional  
in Business

**2021 EMPOWERING TODAY'S ACCOUNTANT SEMINAR PROGRAM**  
*Wednesday April 28, 2021*  
Virtual Event

Today's accounting and financial professionals are more than just number crunchers. They are business leaders creating a prosperous future for their company as well as their clients. This critical function requires a combination of strong technical and professional skills along with integrity and a supportive network of peers. Professional accounting and finance associations benefit their individual members as well as the entire professional community. They provide great resources for professionals on technical issues, support for ethical dilemmas, best practices and networking opportunities.

Take advantage of this opportunity to support your lifelong learning and support local professional associations. The Accounting & Financial Women's Alliance Mesa East Valley Chapter and the AZ Valley of the Sun Chapter of the Institute of Management Accountants are presenting this seminar to allow all accounting and financial professionals an opportunity to learn and connect with their peers. Support your profession and make a small investment in your career by joining the members of the AFWA and IMA for the 14th Annual Empowering Today's Accountant Seminar.

## SEMINAR AT A GLANCE

- 8:00-8:15** Announcements
- 8:15-9:10** Title: The Positive Value of Ethics  
**Session 1** Speaker: Marcy Maslov
- 9:20-10:15** Title: Goal Setting  
**Session 2** Speaker: Anna Raney
- 10:30-12:15** Title: Not-For-Profit Industry Updates: A Look at Recent Accounting Standards and the Impact of  
**Session 3** COVID on Single Audits  
Speaker: Jill Shaw
- 12:15-12:45** Social Distancing Networking Lunch
- 12:45-2:30** Title: Considering COVID-19 in Financial Statement Disclosures  
**Session 4** Speaker: Robert Minniti
- 2:45-4:30** Title: The Focus of Transfer Pricing within BEPS 1.0 &2.0 – the “New Landscape”  
**Session 5** Speaker: David Cheney
- 4:30-5:00** Virtual Happy ½ Hour - Networking Event

## **SEMINAR SCHEDULE**

### **8:00 a.m. – 8:15 a.m. Announcements & Introductions**

#### **8:15 a.m. – 9:10 a.m.**

Title: Positive Value of Ethics

Speaker: Marcy Maslov, CPA

Field of Study:

Level of Knowledge: Basic

CPE Credit: 1 Hour

Learning Objectives and Program Content: Every business issue we face has an ethical dilemma at its core. Now more than ever these ethical dilemmas can happen at any level, in any organization, at any time. Ignoring these issues can be enormously costly. In this gamified team-based program we create a working model of ethics with protocols for defining ethics, expectations and practical, positive ethical behavior. We will show you how to unlock the positive value of ethics and create a more positive culture that achieves better results. You will have the chance to practice solving real life business and ethical dilemmas that can and do get in the way of success. You will also strengthen team building, communication, critical thinking and decision-making skills as we discuss real-life ethical dilemmas and the 5 steps to ethical problem solving.

#### **9:20 a.m. – 10:15 a.m.**

Title: Goal Setting

Speaker: Anna Raney

Field of Study: Personal Development

Level of Knowledge: Basic

CPE Credit: 1 Hour

Learning Objectives and Program Content: As we are entering into a new year it is important to know how to set and stick to reasonable goals, this presentation goes through just that, it will help the attendee with tangible tools on how to set realistic goals and tips on how to achieve those goals. It walks you attendees through systems to set goals, visualize goals and gives tools to stay accountable.

#### **10:30 a.m. – 12:15 p.m.**

Title: Not-For-Profit Industry Updates: A Look at Recent Accounting Standards and the Impact of COVID on Single Audits

Speaker: Jill Shaw, CPA

Field of Study: Accounting

Level of Knowledge: Basic

CPE Credit: 2 Hours

Learning Objectives and Program Content: Whether you were in the middle of your annual audit when COVID-19 started making waves or will soon be embarking on your next audit, you can expect that there will an impact on your financial statements and disclosures. Attendees will learn about potential impacts to disclosures for non-profit organizations due to COVID including liquidity and availability; endowments; net assets with restrictions; subsequent events; and going concern.

#### **12:15 p.m. – 12:45 p.m. Social Distancing Networking Luncheon**

**12:45 p.m. – 2:30 p.m.**

Title: Considering COVID-19 in Financial Statement Disclosures

Speaker: Robert K. Minniti CPA, CFE, CrFA, CVA, CFF, MAFF, CGMA, PI, DBA

Field of Study: Auditing

Level of Knowledge: Intermediate

CPE Credit: 2 Hours

Learning Objectives and Program Content: Are you up to speed on the requirements for writing and auditing disclosures and notes to the financial statements? This course is designed for individuals who would like to obtain a better understanding of auditing notes and disclosures, specifically notes and disclosures to COVID-19 issues, government shutdown issues, and civil unrest issues that occurred in 2020. We will review the notes and disclosures to the financial statements and discuss what accountants and auditors should consider when writing and reading the notes, disclosures, and Management Discussion & Analysis (MD&A). We will discuss audit procedures that would allow the auditor to detect a material misstatement in the notes & disclosures from errors or fraud. Attendees will learn to: identify considerations related to the COVID-19 pandemic for financial statement notes and disclosures; identify audit procedures for COVID-19 notes and disclosures; differentiate FASB Conceptual Statements provides information relating to the notes to financial statements; identify a financial statement assertion applicable to both presentation and disclosure as well as transactions and events; and identify information to be disclosed with respect to lines of credit.

**2:45 p.m. – 4:30 p.m.**

Title: The Focus of Transfer Pricing within BEPS 1.0 & 2.0 – the “New Landscape”

Speaker: David Cheney

Field of Study: Tax

Level of Knowledge: Intermediate

CPE Credit: 2 Hour

Learning Objectives and Program Content: The Organization for Economic Cooperation and Development (OECD) released reports under the Base Erosion & Profit Shifting (BEPS) project. The new guidance is expected to alter the transfer pricing outcomes in many situations and require multinational enterprises to undertake additional analysis and documentation. How will the new guidance impact your company?

**4:30 p.m. – 5:00 p.m.**

Virtual Happy ½ Hour Networking Event

## SPEAKER BIOGRAPHIES

**Marcy J Maslov, CPA** is Chief Integrity Builder, executive coach and former international financial manager. Best known for inventing e-Factor!®, the educational board game of business ethics, Marcy has become a powerful voice for her innovative approach to building successful leaders, entrepreneurs and professionals. Marcy is a business coach, entrepreneur and international speaker on ethics and demystifying financial statements. She has been providing gamified ethics CPE since 2010 with the intention of creating a safe space to practice solving ethical dilemmas and get relevant professional education. Marcy's past speaking engagements include Vistage (CEO forum), Arizona Society of CPAs, Rotary International, SHRM regional conference, Institute of Management Accountants, Accounting & Financial Women's Alliance, IEEE, and the Society for Corporate Compliance and Ethics, as well as private corporations with mandatory professional development requirements.



**Anna Raney** is the Director of Leadership & Culture Development for Polston Tax Resolution & Accounting. She leads a team of business development professionals across the U.S. responsible for generating revenue for the firm and building relationships within the community. Anna is particularly passionate about helping small businesses and women succeed. She is a graduate of the SALLT and Light Leadership Program Class 12, an award recipient of the NextGen 30 Under 30 Award, The Cottings Award for Character, and The Rising Star Award. She is a frequent speaker for professional organizations including the Accounting & Finance Women's Alliance, Oklahoma Chamber, and Women in Public Relations Association. She is in the process of developing a state-wide mentoring program to help bridge the generational gap in the professional world to ensure that every woman is not only mentored but can also mentor the next generation.

**Jill Shaw, CPA** is a partner with the CPA firm Heinfeld Meech. She currently manages audit services for nonprofits, municipalities, school districts, and other local governments in Arizona. In her role as a partner Jill provides guidance and training on accounting and auditing issues including accounting pronouncements and auditing standards. She is the coordinator of the firm's lunch and learn program which provides ongoing trainings regarding a variety of finance related topics for nonprofits as well as a frequent presenter for the Alliance of Arizona Nonprofits.





**Robert Minniti** is the President and Owner of Minniti CPA, LLC. Dr. Minniti is a Certified Public Accountant, Certified Forensic Accountant, Certified Fraud Examiner, Certified Valuation Analyst, Certified in Financial Forensics, Master Analyst in Financial Forensics, Chartered Global Management Accountant, and is a licensed private investigator in the state of Arizona. Dr. Minniti received his doctoral degree in business administration from Walden University, received his MBA degree and Graduate Certificate in Accounting from DeVry University's Keller Graduate School of Management, and received his Bachelor of Science in Business Administration degree from the University of Phoenix. Dr. Minniti teaches graduate and undergraduate courses in forensic accounting at Northwestern University, and the University of Phoenix. He designed graduate and

undergraduate courses for Grand Canyon University, Northwestern University, and Anthem College. He is a writer and public speaker. He has experience in forensic accounting, fraud examinations, financial audits, internal audits, compliance audits, real estate valuations, business valuations, internal control development, business continuation planning, risk management, financial forecasting, and Sarbanes-Oxley compliance work. Dr. Minniti is an instructor teaching continuing professional education classes for the American Institute of Certified Public Accountants, Compliance Online, CPE Link/CCH . AccountingEd, Global Compliance Panel, Clear Law Institute, CPE Solutions, Canopy CPE, The Institute of Management Accountants, the National Association of Valuators and Analysts, and various state CPA Societies.

**David Cheney** is a Managing Director and the leader of PwC's transfer pricing practice in Phoenix. He has 20 years of experience in assisting Fortune 1000 companies with various transfer pricing issues, including planning, audit defense, and documentation strategy. He also has an extensive background in pricing analysis, valuation analysis, data modeling, data management, and economic and industry analyses. David focuses on analyzing the economic aspects of domestic and international intercompany pricing matters. He assists companies to set, modify, and document their transfer pricing policies for tangible products, services, and intangible property. David is a frequent guest lecturer on transfer pricing topics at University of Arizona, San Diego State University, and University of California - San Diego. David received his MBA from the University of Chicago – Area of concentration: Quantitative Finance. He received his M.S. in Economics from Utah State University – Area of concentration: Econometrics & Quantitative Methods. He received his B.A. in Economics from Brigham Young University.



## **GENERAL INFORMATION**

***VIRTUAL EVENT:*** Attendees will receive a Zoom link for the seminar sessions prior to the event. Individual attendance will be recorded by check in, check out and polling questions during the sessions.

***CPE CREDIT:*** The Accounting & Financial Women’s Alliance is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).

A CPE Certificate of Completion form will be provided to each attendee following the seminar and attendance confirmation. A program evaluation form will also be provided in your seminar materials packet. Please take the time to complete the evaluation form as your feedback is very important to us and assists us with planning future events. Please return your evaluation form to the chapter email.

All sessions are group internet live and have no prerequisite or advanced preparation required unless noted in the session description.

### ***SEMINAR CONTACTS:***

Laura Mangan at [afwamev@gmail.com](mailto:afwamev@gmail.com) or 480-276-5926

### ***CHAPTER WEBSITES:***

AFWA Mesa East Valley Chapter: [mesaeastvalleyafwa.org](http://mesaeastvalleyafwa.org)

IMA AZ Valley of the Sun Chapter: [azvots.imanet.org](http://azvots.imanet.org)

## **AFWA History & Mission**

The Accounting & Financial Women’s Alliance (formerly the American Society of Women Accountants) was formed in 1938 to increase the opportunities for women in all fields of accounting and finance. The first chapter was chartered in Indianapolis, Indiana. Members and their companies benefit from practical resources and programs that strengthen their professional growth. Accounting & Financial Women’s Alliance members tap into an extensive knowledge base of accounting and finance professionals with technical expertise to provide solutions for the most complex issues. The majority of our members have attained professional certifications such as CPA, CMA, CIA, and CFP. The mission of the Accounting & Financial Women’s Alliance is to enable women in all accounting and finance fields to achieve their full potential and to contribute to their profession. [www.afwa.org](http://www.afwa.org)

## **IMA History & Mission:**

With a network of about 60,000 professionals, the Institute of Management Accountants (IMA) provides a dynamic forum for management accounting and financial professionals to develop and advance their careers through its Certified Management Accountant (CMA<sup>®</sup>) program, cutting-edge professional research and practice development education, networking, and the advocacy of the highest ethical and professional practices. IMA is dedicated to rebalancing the accountancy profession by educating society regarding the business building role of management accountants and finance professionals working inside organizations. The mission of IMA is to empower accountants and financial professionals to become “trusted business advisors” playing a driving role in their organizations’ business success and advancing their careers. [www.imanet.org](http://www.imanet.org)

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**Registration Form**



Registration

AFWA/IMA Member Registration:	\$75
Regular Registration:	\$125
Student Registration:	\$25

Registration Deadline: April 27, 2021

_____ Name	_____ Company
_____ Address	_____ Title
_____	_____ Email
_____	_____ Phone

Please include email address. Confirmation emails will be sent prior to event. Space is limited.

Please make checks payable to AFWA and mail with completed registration form to:

AFWA P.O. Box 2216 Gilbert, AZ 85299

AFWA Tax ID # 86-0545075

If you are unable to attend, you may send a colleague in your place. Refunds will only be issued for reservations canceled prior to the final registration due date. For more information regarding administrative policies, please contact AFWA Mesa East Valley Chapter Seminar Chair, Laura Mangan at [chapter@mesaeastvalleyafwa.org](mailto:chapter@mesaeastvalleyafwa.org) or call 480-276-5926.

Online registration and credit card payment option available at [www.mesaeastvalleyafwa.org/seminars](http://www.mesaeastvalleyafwa.org/seminars).