



The National Association of Black Accountants, Inc. Facilitator's Kit

Thank you for your interest in leading a CPE Technical Session as a partner at the 2018 NABA National Convention & Expo.

Deadlines

Session titles/logistics due: **March 1, 2019**

Session outline and description due: **March 15, 2019**

Presenter(s) bios and photos due: **March 29, 2019**

PowerPoint presentations due: **May 10, 2019**

General Session Information

- Session topics are available on a first come, first served basis.
- You can suggest a session on any topic you think would be interesting to participants, as long as it falls NASBA guidelines and fields of study. Your session title is up to you.
- CPE sessions can only be scheduled after your partnership agreement has been completed.
- NABA CPE technical sessions are designed to correspond to National Association of State Boards of Accountancy (NASBA) guidelines.

Suggested Session Topics

Need help developing a topic? Session topic suggestions are listed below.

NASBA Fields of Study: Accounting and Auditing

Hot Topics:

- How technology is changing the audit
- Preparing your clients for regulatory changes
- The evolution of client accounting advisory services
- After hourly: billing differently to increase value to clients
- Advances in data analytics
- Cash-basis and modified cash-basis frameworks
- Audit documentation best practices
- Revenue recognition in Healthcare
- New perspectives in compliance
- Fraud: How to detect it and how to avoid it
- Case study: Using an example from your company, narrate a strategic challenge and walk session participants through the optimized solution

Standard Topics:

- FASB/IASB Update
- GAAP Update
- Revenue recognition of the future accounting ethics
- Internal controls and risk assessment forensic accounting
- Preventing and detecting identity theft auditing developments
- Auditing ethics
- New requirements in transparency
- New requirements in disclosure
- Lean accounting



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- Non-GAAP financial reporting
- New leasing standards

NASBA Field of Study: Finance

Hot Topics:

- Even better financial dashboards
- Designing data extraction techniques
- What data should you be mining?
- How to use statistical sampling
- How the global financial outlook will impact corporate and individual clients
- New issues in estates and trusts
- Innovations in financial planning software
- Introduction to Behavioral Finance
- New Issues with Annuities
- New Sheriffs: How progressive legislative priorities will impact the banking and finance industries
- Case study: Using an example from your company, narrate a strategic challenge and walk session participants through the optimized solution

Standard Topics:

- Data analytics
- Presentation skills for finance professionals
- Accounting & finance writing
- Critical thinking skills for finance and accounting professionals
- Communicating with a purpose and for results

NASBA Field of Study: Information Technology

Hot Topics:

- Robo-accounting: A primer
- Budgeting for Technological Enhancements
- Making the case for technology investments
- What you need to know about the dark web
- How to stay ahead of privacy issues
- Data security: How to think like the hackers
- Voice-enabled Technology: Is it for real?
- Using blockchain in your everyday work
- How to use cloud-based technology to improve productivity
- Case study: Using an example from your company, narrate a strategic challenge and walk session participants through the optimized solution

Standard Topics:

- Emerging technology trends
- Cybersecurity
- How data is shaping the accounting profession
- Technology tools to improve your workflow
- Identity theft
- Ways technology can accelerate your growth
- Robotics
- Artificial intelligence
- Virtual reality



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NASBA Field of Study: Personal Development

Hot Topics:

- Being authentic in an age of political correctness
- Giving and receiving feedback
- Leading your leaders
- Leveraging the thought diversity on your team
- Taking your own advice: How to make sure you are building your own wealth
- Personal success measures- Can you quantify your success trajectory?
- Lessons from Failure-- How to ensure you learn the right lessons from your failures
- Managing Your Inbox-- How to be responsive without becoming overwhelmed
- Taking time to learn-- How to improve your knowledge while juggling your day to day workload
- Decision Day- When do you need to take your skills elsewhere
- Case study: Using an example from your company, narrate a strategic challenge and walk session participants through the optimized solution

Standard Topics:

- Creative problem solving
- Effective communication
- The art of multi-tasking
- Becoming and staying relevant
- Career advancement

NASBA Field of Study: Tax

Hot Topics:

- Tax Implications for cryptocurrency
- Impact of the Tax Cuts and Jobs Act
- Developments in the tax regulatory environment
- State to state taxation
- Real estate tax update
- Case study: Using an example from your company, narrate a strategic challenge and walk session participants through the optimized solution

Standard Topics:

- 2019 hot tax topics
- Ethical issues facing tax professionals
- State and local tax update
- Federal tax updates
- Dealing with the IRS
- Estate planning
- Emerging legislative developments

NASBA Field of Study: Consulting Services/ Communications

Hot Topics:

- Accounting Marketing-- Your role in client acquisition
- Converting prospective clients
- Developing a sales pipeline
- Case study: Using an example from your company, narrate a strategic challenge and walk session participants through the optimized solution



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Standard Topics:

- Launching a business
- Winning new business
- Social media marketing
- Networking
- Effective communication
- Personal branding

NASBA Field of Study: Business Management & Organization

Hot Topics:

- Understanding unconscious bias
- Developing and using key performance indicators
- Building and managing virtual teams
- Case study: Using an example from your company, narrate a strategic challenge and walk session participants through the optimized solution

Standard Topics:

- Becoming a More Effective Leader
- Emotional Intelligence
- Strategic Thinking
- Creativity and Innovation
- The Right Credentials

Current Collegiate Students

Hot Topics:

- Preparing for an interview
- Things interviewers hate
- How important is looking the part?
- Highlighting your genius without being arrogant
- Negotiating salaries
- How to get yourself recruited
- What to do if you don't have work experience

Standard Topics:

- To Firm or not to Firm-How to choose between job offers at firms, corporations, and government agencies balancing social interests with work realities
- Stand up and stand out- what differentiates top applicants from others
- Career GPS- how to build a long-term career path
- Entrepreneurship skills
- What recruiters are really saying about you

Proposing a Course or Session

After you submit your proposed session, it must be approved by NABA to ensure that it conforms with NASBA guidelines.

All course/session/presentation proposals should be submitted online through our online convention management system. A link will be provided to you by your partnership coordinator.

You will be asked to provide basic information about the course/session/presentation you are



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proposing:

- **Partner Name**
Provide the name of your company or organization.
- **Name your session**
Provide a session name that describes the topic your session will address.
- **Session Duration and Credits**
How long will your session last?
 - 50 minutes = 1 credit hour
 - 100 minutes = 2 credit hours
- **Fields of Study**
CPE Sessions offered at the NABA National Convention and Expo coincide with the National Association of State Boards of Accountancy (NASBA) approved fields of study. What field of study will your session address?
 - Technical
 - Accounting
 - Auditing
 - Information Technology including Cybersecurity
 - Finance
 - Management Services including Risk Management
 - Regulatory Ethics
 - Taxes
 - Non-technical
 - Behavioral Ethics
 - Business Management and Organization
 - Communications and Marketing
 - Computer Software and Applications
 - Consulting Services
 - Personal Development
 - Leadership
- **Marketing Description**
Provide a description of your session that will attract attendees.
- **Learning Objectives**
What knowledge, skills, and abilities will this session help attendees develop?
- **Ideal Participant**
What professional level is the ideal participant in your session currently employed (check all that apply).
 - Staff/analyst and above
 - Manager
 - Senior Manager/Controller
 - Principal/Director/CEO/CFO
- **Course Difficulty**
How complex is the content your session will use?
 - Basic
 - *Intermediate
 - *Advanced
 - *Update

**Identify prerequisite education or experience the participant should have prior to attending this course/session/presentation.*
- **Practice/Specialty Areas**
Note the related practice/specialty areas.
 - Accounting & Auditing



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- Business & Industry (functional area)
- Business Valuation/Litigation Services (BVLS)
- Employee Benefits
- Fraud and Forensic
- Government Contracting
- Government & Not-For-Profit
- Personal Financial Planning (PFP)
- Taxes
- **Content Author**
Identify the author(s) of the content for this session
- **Speaker/Presenter(s)**
Identify the speaker or presenter(s) who will deliver the content during this course, session, or presentation.
 - Include speaker bio and photo for use in conference materials (see below)

Speaker Bio and Photo Requirements

Speaker Bio and Photo Requirements

- A color, high-resolution digital photograph. Format can be jpg or tif (gif, bmp, pdf, PowerPoint are not usable). **Photos must be high resolution** – 300 dpi (dots per inch) at least 2 inches by 2 inches. Generally, photos taken at the highest setting on a digital camera will work. **Photos taken by camera phone for Web use – 72 dpi – will not work.**
- A 100 -word short bio for the printed program, convention app and/or website. Please include: name, title, company name and description, length of time in current role, responsibilities/expertise, how your experience relates to the topic of the presentation, prior roles/credentials, and education.
- A full bio or written introduction for speaker introductions (will be used as needed).
- Specific experience, education, and credentials which demonstrate speaker/presenter's qualifications to provide instruction and trustworthy content.

Examples:

Credentials

Professional designation demonstrating mastery of subject matter and ongoing contemporary education in the field, i.e. certified public accountant (CPA), certified financial planner (CFP), or Financial Risk Manager Certification (FRM).

Education

Earning of an accredited degree or professional certificate which demonstrates completion of coursework related to the subject matter or participation in conferences, seminars, or workshops designed to increase knowledge of the subject matter and promote contemporary discussion of related topics. Examples include: Ph.D. in accounting, M.B.A. in finance, Workshop in Accounting Research at the University of Chicago Booth School of Business, AICPA Annual Accounting and Auditing Workshop. Presenters/instructors/facilitators are encouraged to elaborate on subject matter included in the educational program.



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Experience

Prior experience as a workshop presenter, academic faculty member, project leader, or company executive through which you have been able to showcase your expertise. Examples include: professor of accounting at the University of Georgia, PWC audit team leader, presenter at the NABA National Convention and Exposition on the topic of “contemporary issues in taxation.”

Preferred Dates

Please indicate your top three preferences for dates and times when you would like your session scheduled. Please note the length and CPE credits associated with each available time.

| | |
|--|--|
| Thursday, June 20/ 8:00 a.m.-8:50 a.m. (50 mins: 1 CPE credit) | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 |
| Thursday, June 20/ 9:00 a.m.-10:15 p.m. (75 mins: 1.5 CPE credits) | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 |
| Thursday, June 20/ 12:45 p.m.-1:35 p.m. (50 mins: 1 CPE credit) | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 |
| Thursday, June 20/ 1:50 p.m.-2:40 p.m. (50 mins: 1 CPE credit) | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 |
| Friday, June 21/ 8:00 a.m.-9:15 a.m. (75 mins: 1.5 CPE credits) | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 |
| Saturday, June 22/ 9:00 a.m.-10:40 a.m. (100 mins: 2 CPE credits) | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 |
| Saturday, June 22/ 11:00 a.m.-12:40 p.m. (100 mins: 2 CPE credits) | <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 |

Room Setup

All session rooms will be set theatre or classroom style and will include a single hand-held or podium microphone, a laptop computer, a projector, and a screen. Note: All additional audio/visual is the responsibility of the sponsoring company. If you are using your own Mac, you must bring your own adapter.

Changes cannot be made less than 14 days before the convention.

Do you need a flip charts with easel and markers Yes No

Do you need audio? Yes No

Does your presenter need a table? Yes No

Will you be bringing/displaying any signs, banners, table displays, etc.? Yes No

If yes, please describe _____.

Additional requests: Please note any additional requests _____