

CPE Today · 2027 K2 Technology Conferences

Agentic AI and Security: An Accounting Professional's Guide

Artifical Intelligence

June 23, 2027	8 CPE	1 day
Live online · Central Time	Credits, proposed	Group Internet Based

About the Conference

This conference provides a technical and legal framework for integrating artificial intelligence into business operations. The program moves beyond basic conversational prompts to explore agentic AI systems that perform multi-step actions and 'vibe coding' workflows that allow non-developers to build functional prototypes. Participants will analyze live demonstrations of agents executing business scenarios and learn to manage the material disengagement that occurs when AI handles syntax while humans maintain strategic logic.

In addition to technical implementation, the curriculum addresses the critical governance and legal requirements for AI. Sessions cover the drafting of enforceable use policies, mapping Model Context Protocol (MCP) vulnerabilities to breach-notification laws, and avoiding Title VII traps in AI-driven hiring. The day concludes with a career-mapping exercise focused on human irreplaceability within automated organizations. Attendees will leave with a sample AI policy and a framework for tool selection and workflow architecture.

Who Should Attend

- Controllers and CFOs needing to draft enforceable AI usage and data handling policies.
- Finance leads who want to build functional prototypes without manual line-by-line coding.
- Compliance officers managing the legal liability of autonomous agentic systems.

What You'll Take Away

- Draft an enforceable corporate AI policy covering data handling and output verification.
- Build functional application prototypes using iterative feedback loops in Claude and Copilot.
- Map MCP vulnerabilities to breach-notification laws to ensure regulatory compliance.
- Execute a career-mapping exercise based on human cognitive advantages over automated systems.
- Identify trade secret waivers and liability risks under the DTSA and UETA when using public LLMs.

Proposed Agenda

Day One

8:00 AM – 9:40 AM

From Assisted to Autonomous: The Agentic AI Revolution

Information Technology · Basic · 2 CPE

For the past few years, AI has mostly waited for a prompt. You asked, it answered, and you did the rest. That's changing fast. AI agents can now plan a task, use connected tools and apps, take action, check their own work, and keep going until the job is done, and the software businesses already use is building them in. Open standards like the Model Context Protocol (MCP) let agents connect directly to email,...

- Distinguish between AI assistants, rule-based automations, and AI agents
- Describe how an AI agent plans tasks and uses tools and connectors, including MCP, to act across systems
- Identify accounting and business processes suited to agentic AI
- Evaluate the risks of autonomous AI actions, including data access, errors, and accountability

Prerequisites: None · Advance preparation: None

9:40 AM – 9:50 AM Break

9:50 AM – 11:30 AM

CHOOSE ONE OF 2 SESSIONS

Building an AI Policy Your Employees Will Actually Follow

Business Management & Organization · Basic · 2 CPE

Most AI policies are either so restrictive they get ignored or so vague they mean nothing. This session walks through what effective AI governance looks like at the team level: acceptable use, data handling, output verification, and accountability chains. Sample policy included.

- Identify why AI policies fail when they are too restrictive or too vague.
- Define acceptable use rules for AI tools at the team level.
- Establish data handling requirements for information entered into AI tools.
- Design output verification steps and accountability chains for AI-assisted work.

Prerequisites: None · Advance preparation: None

Prompt Engineering Is Dead. Now What?

Information Technology · Intermediate · 2 CPE

The craft of writing clever prompts is being replaced by structured tools, voice interfaces, and MCP integrations. This session covers what skills professionals actually need now that the prompt bar is being abstracted away, including tool selection frameworks and workflow architecture.

- Explain how structured tools, voice interfaces, and MCP integrations are replacing hand-written prompts.
- Identify the skills professionals need as prompting is built into their tools.
- Apply a tool selection framework to choose AI tools for specific tasks.
- Design a workflow architecture that connects AI tools to existing work.

Prerequisites: Regular experience using generative AI chat tools. · Advance preparation: None

11:30 AM – 12:30 PM Lunch

12:30 PM – 2:10 PM

CHOOSE ONE OF 2 SESSIONS

AI Liability: Enforceable Policies and Regulatory Traps

Business Law · Intermediate · 2 CPE

A deep dive into the legal mechanics of AI: Drafting enforceable corporate use policies, mapping MCP vulnerabilities to breach-notification laws, and navigating the 'Title VII Traps' in AI-driven hiring. Covers binding authority under UETA/E-SIGN and trade secret waivers under the DTSA when using public LLMs.

- Draft an enforceable corporate AI use policy.
- Map MCP vulnerabilities to breach-notification law obligations.
- Identify the Title VII risks that arise when AI is used in hiring.
- Evaluate binding authority questions under UETA and E-SIGN when AI acts for the organization.

Prerequisites: A working knowledge of generative AI tools and of the organization's existing employment and data policies. · Advance preparation: None

Vibe Coding in Practice: From Conversational Prompting to Functional Prototypes

Information Technology · Basic · 2 CPE

This session moves beyond the buzzword to demonstrate how practitioners can use tools like Claude AI and Microsoft Copilot to build functional applications without manual line-by-line coding. Designed for non-developers and technically-curious leads, it covers the 'vibe coding' workflow: describing high-level intent, using iterative feedback loops to fix bugs, and managing the 'material disengagement' that occurs...

- Describe the vibe coding workflow of stating high-level intent and refining the result through feedback.
- Apply tools such as Claude and Microsoft Copilot to build a functional prototype without manual coding.
- Use iterative feedback loops to find and fix bugs in AI-generated applications.
- Validate AI-generated output while keeping oversight of the application's logic.

Prerequisites: None · Advance preparation: None

2:10 PM – 2:20 PM Break

2:20 PM – 4:00 PM

The Human Edge: What AI Cannot Replace and Why That Changes Everything About Your Career

Personal Development · Basic · 2 CPE

The closing keynote reframes AI disruption around human irreplaceability — not as a platitude but as a strategic argument grounded in cognitive science, economics, and organizational behavior. Includes a live career-mapping exercise attendees complete in pairs and walk out with.

- Identify the human capabilities AI cannot replace in professional work.
- Analyze the case for human irreplaceability drawn from cognitive science, economics, and organizational behavior.
- Evaluate how AI disruption affects their own role and career path.
- Develop a personal career map in a paired exercise.

Prerequisites: None · Advance preparation: None

All times Central Time. Proposed agenda — sessions, times and credits may change before the conference. Registration details, final credits and NASBA disclosures are published on the conference page.
https://www.cpetoday.com/conferences/2027/agentic-ai-and-security