

CPE Today · 2027 K2 Technology Conferences

Control-Alt-CPA: Tech Conference 2027

Tomorrow's Technology for Today's CPA

May 19–20, 2027
Spring edition · Live online · Central Time

December 1–2, 2027
Winter edition · Live online · Central Time

16 CPE
Credits, proposed

2 days
Group Internet Based

About the Conference

This two-day program provides a comprehensive technical update for CPAs in public practice and industry. The curriculum is built around four distinct tracks—CPA Firm, Industry, Productivity, and Vendor—ensuring the content is relevant to your specific professional role. You will evaluate the current state of the accounting tech stack, from fundamental Excel techniques to advanced Microsoft 365 AI orchestration and agentic CAS practices.

Beyond software updates, the conference addresses today's regulatory and security environment. Sessions provide a pragmatic roadmap for FTC Safeguards compliance and SOC 2 requirements, alongside a minute-by-minute analysis of a real-world cyberattack. You will also examine the emerging legal frontier of AI mistakes and professional liability. This is a technical program designed to move your practice from manual data entry to high-value business intelligence and secure, automated workflows.

Who Should Attend

- Firm partners looking to transition from hourly billing to value-based advisory models.
- Controllers needing to standardize KPIs across disparate departmental reports.
- Tax preparers and financial advisors required to meet the FTC Safeguards Rule.
- Managers seeking to reduce interruptions through productivity architecture and focus tools.

What You'll Take Away

- Build a reporting infrastructure that serves as a single source of truth for your organization.
- Implement automated retention policies and e-signature integration within a paperless document management system.
- Apply AI agents to automate accounts receivable follow-ups and 24/7 cash flow monitoring.
- Construct a decision-driving dashboard in Power BI by connecting live data sources.
- Execute a cybersecurity tabletop exercise to identify organizational gaps using current AI attack simulations.
- Identify which manual tasks in QuickBooks Online can be replaced by automated anomaly detection and predictive cash flow.

Proposed Agenda

Day One

8:00 AM – 9:40 AM **Tech Update**

Information Technology · Intermediate · 2 CPE

Staying up to date with advances in today's technology has never been more vital, and K2's Tech Update equips you with the knowledge to stay ahead of the rapid pace of innovation. This comprehensive session is designed for accountants who want to understand the evolving technological landscape and its implications for the accounting profession. Which technology trends are worth monitoring? What ar

Prerequisites: None · Advance preparation: None

9:40 AM – 9:50 AM Break

9:50 AM – 11:30 AM

CHOOSE ONE OF 4 SESSIONS

CPA Firm Update

Computer Software and Applications · Intermediate · 2 CPE

Overview of applications for CPAs in public practice in the US and Canada. Keep them together by department including tax, audit, CAS, and more

- Identify the leading software applications currently impacting tax, audit, and CAS departments in the North American market.
- Evaluate the functional differences between US-based and Canadian-based CPA firm solutions.
- Analyze how departmental toolsets can be integrated to reduce data silos within a multi-service firm.
- Assess the strategic impact of specialized niche applications on traditional firm workflow models.

Prerequisites: A working knowledge of standard public accounting workflows in tax, audit, and client services. · Advance preparation: None

Building a Reporting Infrastructure Your Whole Organization Actually Trusts

Computer Software and Applications · Intermediate · 2 CPE

When every department runs a different report and no two numbers match, trust in data collapses. This session covers building a single source of truth, report governance frameworks, KPI standardization, and change management strategies for getting organizational buy-in.

- Identify the root causes of data fragmentation and the impact of 'shadow IT' on organizational decision-making.
- Design a report governance framework that balances departmental flexibility with enterprise-level data integrity.
- Develop a plan for KPI standardization that reconciles conflicting definitions across finance, sales, and operations.
- Apply change management principles to secure executive buy-in and user adoption for new reporting infrastructures.

Prerequisites: General familiarity with organizational reporting tools such as Power BI or Excel and experience managing departmental data workflows. · Advance preparation: None

Personal Productivity Architecture: Time Blocking, Deep Work, and Tech Guardrails

Information Technology · Intermediate · 2 CPE

Targeted at the individual contributor and manager, this session focuses on the psychology and technology of focus. We examine tools that audit time (like RescueTime or Toggl) and those that protect it (Focus modes, hardware 'busy' lights, and notification aggregators). The session moves from 'tips' to a systematic architecture for the workday, teaching attendees how to use technology to defend against the...

- Analyze the impact of 'context switching' on cognitive load and billable efficiency within professional services.
- Configure OS-level focus modes and notification aggregators to filter non-essential digital interruptions.
- Design a structured 'Time Blocking' calendar architecture that prioritizes deep work over reactive communication.
- Evaluate time-auditing software to identify specific digital leaks and workflow bottlenecks.

Prerequisites: Experience managing professional workflows within cloud-based collaboration environments such as Microsoft Teams or Slack. · Advance preparation: None

QuickBooks in the Age of AI: What's New, What's Coming, and What to Stop Doing Manually

Accounting · Basic · 2 CPE

	QuickBooks Online Advanced is no longer just the place where transactions get recorded. Intuit has built AI agents into the product to take on routine work, and QuickBooks now connects directly to popular AI assistants, so you can ask questions of your books, build analyses, and draft reports in plain English. Add Spreadsheet Sync, which moves QuickBooks data in and out of Excel, and the AI now built into... • Identify the AI features and automation built into QuickBooks Online Advanced and the tasks each handles • Determine which manual bookkeeping, invoicing, and collection tasks can be handed off to QuickBooks automation • Describe how QuickBooks connects to AI assistants and apply that connection to answer questions and build reports from company data • Apply Spreadsheet Sync and spreadsheet AI tools to report on and analyze QuickBooks data Prerequisites: None. Basic familiarity with QuickBooks Online is recommended. · Advance preparation: None
11:30 AM – 12:30 PM	Lunch

12:30 PM – 2:10 PM

CHOOSE ONE OF 4 SESSIONS

Building the 'Agentic' CAS Practice: Real-Time Advisory at Scale

Management Services · Intermediate · 2 CPE

Client Accounting Services (CAS) is shifting from bookkeeping to real-time advisory. This session is for firm leaders looking to use AI agents for 24/7 cash flow monitoring, automated accounts receivable follow-ups, and predictive forecasting. We will discuss how to restructure 'outsourced accounting' fees from hourly billing to value-based advisory by leveraging agents that watch the data while the staff sleeps,...

- Define the concept of 'Agentic' CAS and how it differs from traditional automated bookkeeping.
- Identify specific workflows where AI agents can perform continuous cash flow monitoring and accounts receivable follow-ups.
- Evaluate the shift from hourly billing to value-based pricing models enabled by 24/7 autonomous data surveillance.
- Determine the criteria for 'exception-based' advisory interventions where human expertise is required.

Prerequisites: A foundational understanding of current Client Accounting Services (CAS) workflows and basic familiarity with cloud-based accounting ecosystems. · Advance preparation: None

404: Skills Not Found — Closing the Technology Gap in Your Business With Upskilling

Personal Development · Basic · 2 CPE

The work isn't getting smaller, but the pool of people to do it is. New CPA exam candidates fell from about 42K in 2023 to 28K in 2024, a drop of roughly a third, and college accounting graduates have hit a 20-year low, so the pipeline won't refill any time soon. Hiring your way out isn't a realistic plan. The organizations pulling ahead are getting more from the team they already have by making people more...

- Identify the causes and costs of the technology skills gap in accounting and business teams
- Assess a team's current technology and AI skills against the tools it uses or plans to adopt
- Compare upskilling, reskilling, and hiring to determine the best approach for a given skills gap
- Outline an upskilling plan that includes training formats, time commitments, and accountability

Prerequisites: None · Advance preparation: None

Power BI for the Rest of Us: Building Reports That Actually Get Used

Information Technology · Intermediate · 2 CPE

A practical introduction to Power BI for non-technical professionals. Covers connecting data sources, building your first dashboard, and the design principles that make reports drive decisions rather than collect dust. Live build included.

- Identify the primary workflow stages in Power BI from initial data connection to final report publication.
- Apply data transformation techniques within Power Query to clean and prepare information for analysis.
- Select appropriate visualization types based on the specific business questions being addressed.
- Implement core design principles that improve report readability and user adoption rates.

Prerequisites: A foundational understanding of data structures and experience working with Microsoft Excel pivot tables or similar reporting tools. · Advance preparation: Attendees should have the Power BI Desktop application installed on their primary workstation prior to the session to follow the live build demonstrations.

Microsoft Agent 365

Information Technology · Intermediate · 2 CPE

Microsoft's AI orchestration

- Differentiate between standard Copilot assistance and the autonomous capabilities of Microsoft Agent 365.
- Identify the core components of the Microsoft Copilot Studio required to build custom agents.
- Analyze the security and data governance protocols necessary for deploying agents within a professional services environment.

- Evaluate specific accounting and finance use cases for automated orchestration across the Microsoft 365 ecosystem.

Prerequisites: A foundational understanding of Microsoft 365 and general familiarity with artificial intelligence concepts. · Advance preparation: None

2:10 PM – 2:20 PM Break

2:20 PM – 4:00 PM

K2's Excel Tips, Tricks, and Techniques for Accountants

Information Technology · Intermediate · 2 CPE

Excel is the go-to tool for accountants when it comes to analyzing and reporting financial data. However, many professionals still rely on time-consuming and error-prone methods for everyday tasks. Whether you're a beginner or an experienced user, our course is designed to help you master Excel and transform your workflows. In this course, you'll discover a trove of tips, tricks, and techniques

Prerequisites: None · Advance preparation: None

Day Two

8:00 AM – 9:40 AM

The Intelligence Layer: How AI Is Rewriting Every Industry Simultaneously

Information Technology · Intermediate · 2 CPE

AI in 2026 isn't a tool you visit — it's an invisible layer embedded in every app, workflow, and decision. This keynote maps the shift across healthcare, finance, law, logistics, and local government, and closes with a structured 2027 forecast of what changes and what doesn't.

- Analyze the transition from generative AI tools to embedded 'intelligence layers' within enterprise software ecosystems.
- Identify key AI transformation patterns occurring across diverse sectors, including healthcare, legal, and logistics.
- Evaluate the strategic implications of autonomous decision-making systems on traditional professional services.
- Assess the 2028 technical forecast to prioritize long-term technology investments over short-term hype cycles.

Prerequisites: A foundational understanding of current generative AI tools and general business technology trends. · Advance preparation: None

9:40 AM – 9:50 AM Break

9:50 AM – 11:30 AM

CHOOSE ONE OF 4 SESSIONS

AI-Powered Tax Workflow: Portals, Prep Tools, and Automation

Business Management & Organization · Intermediate · 2 CPE

Discover how AI can streamline tax workflows, enhance preparation tools, and automate processes for efficiency and accuracy.

Prerequisites: None · Advance preparation: None

Effectively Building Applications that You Can't Buy

Information Technology · Intermediate · 2 CPE

Claude Code Vibe Coding MCP connections to legacy applications Workflows

- Identify specific business process gaps where custom-built applications provide a higher ROI than modified off-the-shelf software.
- Explain the concept of 'vibe coding' and how natural language interfaces are lowering the barrier to entry for functional application development.
- Analyze the role of Model Context Protocol (MCP) in bridging the gap between AI development tools and local legacy data sources.
- Apply a structured workflow for iterative application building, from initial prompt-based architecture to deployment for internal team use.

Prerequisites: A basic understanding of software-as-a-service (SaaS) limitations and experience managing business workflows. · Advance preparation: Familiarity with at least one LLM chat interface (e.g., Claude, ChatGPT) and a general understanding of internal business data structures is recommended.

Optimizing Your Business Tech Stack

Computer Software and Applications · Intermediate · 2 CPE

In the ever-evolving landscape of business technology, it is about having the right tools and optimizing for efficiency and cost-effectiveness. K2's Optimizing Your Tech Stack for Efficiency and Cost-Effectiveness is designed for professionals seeking to balance functionality with financial prudence. This session delves into strategies for streamlining your technology stack without sacrificing per

Prerequisites: None · Advance preparation: None

Wolters Kluwer AI Innovations

Information Technology · Intermediate · 2 CPE

Axcess Advisor, and the other four AI offerings

- Identify the five primary AI-driven offerings within the Wolters Kluwer ecosystem and their specific functional roles.
- Analyze the integration capabilities of Axcess Advisor within existing tax and audit workflows to improve research efficiency.
- Evaluate the data security and privacy protocols employed by Wolters Kluwer to protect sensitive client information in an AI environment.
- Assess the impact of generative AI on professional judgment and the required verification steps for AI-generated tax research.

Prerequisites: A working knowledge of the CCH Axcess ecosystem and general familiarity with cloud-based tax and audit workflows. · Advance preparation: None

11:30 AM – 12:20 PM

Lunch

12:20 PM – 1:10 PM

CHOOSE ONE OF 4 SESSIONS

Document Management and the Paperless Firm: What Actually Works

Computer Software and Applications · Intermediate · 1 CPE

Beyond scanning paper — this session covers intelligent document management, automated retention policies, version control, e-signature integration, and AI-assisted document classification. Real platform comparisons across Hubdoc, Dext, Bill.com, and others.

- Identify the core components of an intelligent document management system in a modern CPA firm.
- Compare the features and automation capabilities of SmartVault, Hubdoc, Dext, BILL, within a paperless tech stack.
- Recognize how AI-assisted classification and automated retention policies reduce manual administrative overhead.
- Evaluate best practices for integrating e-signatures and version control into a secure firm workflow.

Prerequisites: A basic understanding of cloud-based accounting workflows and current document storage practices. · Advance preparation: None

Case Studies In Fraud And Technology Controls

Audit · Intermediate · 1 CPE

Fraud continues to plague businesses at epidemic levels, and technology control failures are a significant reason fraud occurs. Using a case study approach, in this session, you will learn about the pervasiveness of fraud, the control failures contributing to fraud, and what you can do to mitigate fraud risk. A specific focus of this course is applying information technology general controls an

Prerequisites: None · Advance preparation: None

Red Team Your Own Business

Specialized Knowledge · Intermediate · 1 CPE

A structured tabletop exercise where small teams attempt to breach, manipulate, or deceive a simulated organization using the exact AI tools attackers use today. No technical background required. Facilitated debrief reveals the most common organizational gaps.

- Identify common organizational vulnerabilities that are amplified by generative AI tools.
- Apply red-teaming principles to evaluate the strength of internal business processes.
- Develop a framework for balancing high-speed productivity with necessary internal controls.

Prerequisites: A baseline understanding of common generative AI tools (e.g., ChatGPT, Claude) is recommended. · Advance preparation: None

Thomson Reuters AI Strategies

Information Technology · Intermediate · 1 CPE

CoCounsel, Ready to Review, Ready to Advise

- Identify the core functionalities of CoCounsel within the Thomson Reuters professional software suite.
- Distinguish between the practical applications of 'Ready to Review' and 'Ready to Advise' in daily accounting and tax workflows.
- Evaluate the impact of generative AI on professional research speed and document analysis accuracy.
- Outline a strategic framework for deploying Thomson Reuters AI tools to minimize implementation friction within a firm.

Prerequisites: A foundational understanding of accounting firm workflow and document management systems. · Advance preparation: None

1:10 PM – 1:20 PM Break

1:30 PM – 2:20 PM CHOOSE ONE OF 4 SESSIONS

Cybersecurity Compliance for CPAs and Financial Firms: FTC Safeguards, SOC 2, and What You Actually Need

Regulation Ethics · Intermediate · 1 CPE

The FTC Safeguards Rule now applies to tax preparers and financial advisors. This session demystifies the compliance landscape, distinguishes between what's legally required versus what's vendor upsell, and gives practitioners a pragmatic implementation roadmap.

- Identify the specific requirements of the FTC Safeguards Rule as they apply to tax preparation and accounting firms.
- Differentiate between mandatory legal compliance (FTC) and voluntary security frameworks (SOC 2).
- Evaluate internal firm protocols to determine which security controls are essential and which are optional.
- Develop a phased roadmap for implementing a compliant written information security plan (WISP).

Prerequisites: A basic understanding of firm data storage practices and general familiarity with the Gramm-Leach-Bliley Act (GLBA) requirements for tax preparers. · Advance preparation: None

Who Owns the AI's Mistake? Liability, IP, and the New Legal Frontier

Regulation Ethics · Intermediate · 1 CPE

When an AI agent gives bad advice, generates infringing content, or executes a costly error — who's liable? A practical primer on contracts, indemnification, terms of service, and the emerging case law every business owner and professional services firm needs to understand.

- Identify the primary legal risks associated with AI-generated output, including defamation, copyright infringement, and professional negligence.
- Analyze the limitations of liability and indemnification clauses found in common enterprise AI terms of service.
- Evaluate strategies for establishing internal governance and documentation to mitigate vicarious liability for AI errors.
- Differentiate between ownership rights of AI-generated content versus human-authored intellectual property under current regulatory guidance.

Prerequisites: A foundational understanding of how generative AI and large language models are currently utilized in business operations. · Advance preparation: None

Password Manager Review

Information Technology · Intermediate · 1 CPE

As the number of software-as-a-service (SaaS) platforms grows, the friction of managing credentials often leads to security vulnerabilities and lost time. This session provides a comparative analysis of leading password management solutions tailored for the professional productivity track. The discussion moves beyond simple storage to explore enterprise-grade features such as secure sharing protocols, emergency...

- Identify the core differences between browser-based password storage and dedicated enterprise password managers.
- Evaluate key features of top-tier password managers including vault health reporting and secure credential sharing.
- Compare deployment strategies for implementing a password manager across a professional team or firm.
- Analyze the security implications of master password strength and multi-factor authentication integration.

Prerequisites: A basic understanding of web browser security and general familiarity with credential management. · Advance preparation: None

The Modern Accounting Tech Stack: From Bookkeeping to Business Intelligence

Accounting · Intermediate · 1 CPE

A guided tour of how forward-thinking small and mid-size firms are stacking tools in 2026 — from QBO or Xero at the base, through automation layers like Zapier and Make, up through reporting tools like Fathom, Syft, or LivePlan. Includes a real-world example firm build.

- Identify the three primary layers of a modern accounting tech stack: the ledger base, the automation layer, and the intelligence output.
- Evaluate the integration capabilities of middleware tools like Zapier and Make within a standard accounting workflow.
- Analyze how business intelligence tools transform raw ledger data into actionable advisory insights for clients.
- Determine the efficiency gains of utilizing an integrated suite like Zoho for firm-wide process standardization.

Prerequisites: A foundational understanding of cloud accounting software and general business process automation concepts. · Advance preparation: None

2:20 PM – 2:30 PM Break

2:30 PM – 4:10 PM

48 Hours: Anatomy of a Real Cyberattack

Information Technology · Basic · 2 CPE

Every data breach has a story, and it starts long before anyone clicks a link. Attackers choose their targets in two ways: by researching specific people and organizations, or by scanning the internet for any door left unlocked. Once inside, they move through systems, collect what's valuable, and take it out before anyone notices, then turn the stolen data into leverage for ransom. AI has sped up every step, from...

- Identify how attackers select targets, through both research on specific people and opportunistic scanning for weaknesses
- Describe how an attacker gains initial access and expands control inside an organization's systems
- Recognize how stolen data is used for ransom and extortion, including attacks that steal data without encrypting it
- Evaluate the options an organization faces after a breach, including whether to pay, how to recover, and who must be notified

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.
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