

CPE Today · 2027 K2 Technology Conferences

Industry Rewired: Technology, Data, and the Modern Finance Function

Industry Accounting

September 22, 2027	8 CPE	1 day
Live online · Central Time	Credits, proposed	Group Internet Based

About the Conference

Most finance departments run on a core ERP surrounded by sub-ledgers, SaaS tools, and spreadsheets that were added one problem at a time. This conference starts by mapping that landscape and deciding what to fix, connect, or retire. It ends with a practical look at AI in the finance department: variance commentary, forecasting, and invoice extraction, along with agentic tools, the review processes they need, and what CFOs expect of them.

In between, you will build refreshable Power Query models for reconciliations, flux analysis, allocations, and consolidations, and learn how to automate the rules-based work of the month-end close. Sessions cover Power BI reports leadership will use and when Excel is still the better tool, and connecting expense, CRM, payroll, and banking systems to the ERP through native integrations or middleware. The program also covers the verification and approval controls that stop business email compromise and vendor impersonation, and how to manage service accounts, segregation of duties, and change management when workflows run themselves. You will earn credits in Information Technology, Computer Software and Applications, and Accounting.

Who Should Attend

- Controllers and CFOs responsible for finance systems and the month-end close.
- Corporate accountants and financial analysts who spend the start of each month on manual reconciliations and reports.
- Finance leaders evaluating integrations, BI tools, or AI for their department.
- CPAs in industry who want 8 CPE credits in Information Technology, Computer Software and Applications, and Accounting.

What You'll Take Away

- Map your finance systems and decide which tools to fix, connect, or retire.
- Build refreshable Power Query models for reconciliations, flux analysis, allocations, and consolidations.
- Identify close tasks that follow rules and automate them to shorten the month-end cycle.
- Choose between Excel and Power BI for management reporting, and connect reports to the ERP.
- Apply verification and approval controls that stop wire redirection and vendor impersonation.
- Document and manage automated controls, service accounts, and segregation of duties.

Proposed Agenda

Day One

8:00 AM – 9:40 AM **The Finance Tech Stack: ERP, Cloud, and Everything Bolted On**

Information Technology · Intermediate · 2 CPE

Explores the modern finance systems landscape including core ERP, sub-ledgers, SaaS tools, and spreadsheets. Covers how to identify gaps and decide what to fix, connect, or retire.

- Analyze the components of a modern finance tech stack to identify common points of failure and data silos.
- Evaluate the trade-offs between monolithic ERP systems and best-of-breed specialized software applications.
- Apply a decision-making framework to determine whether to repair, integrate, or replace existing financial tools.
- Assess the role of spreadsheets as a permanent but controlled layer within the broader systems architecture.

Prerequisites: Experience working within a corporate finance or accounting department and a general familiarity with enterprise resource planning systems. · Advance preparation: None

9:40 AM – 9:50 AM Break

9:50 AM – 11:30 AM

CHOOSE ONE OF 2 SESSIONS

Excel and Power Query for the Close

Computer Software and Applications · Intermediate · 2 CPE

A hands-on build covering reconciliations, flux analysis, allocations, and consolidations using refreshable queries against system exports.

- Identify how to connect Power Query to external data exports to eliminate manual data entry.
- Apply data transformation steps to clean and format system reports for immediate reconciliation.
- Construct a refreshable flux analysis model that compares current and prior period balances.
- Develop automated allocation tables that update based on source data changes.

Prerequisites: Basic familiarity with Excel formulas and an understanding of the standard month-end close process. · Advance preparation: Participants should ensure Power Query is enabled in their version of Excel. Sample data sets will be provided for download before the session begins.

Automating the Month-End Close

Accounting · Basic · 2 CPE

For most finance teams, the first week of every month looks the same: chasing statements, reconciling accounts line by line, rebuilding the same accruals, and explaining variances under deadline pressure. Much of that work follows rules, which makes it ideal for automation, and AI now handles much of what's left, from flagging unusual transactions to drafting the first version of variance commentary. The goal...

- Identify the period-end tasks best suited to automation and AI
- Apply automated matching rules to speed up bank and balance sheet reconciliations
- Determine which recurring entries and accruals can be automated and what review they still require
- Use AI to analyze period-over-period changes and draft variance explanations for review

Prerequisites: None · Advance preparation: None

11:30 AM – 12:20 PM

Lunch

12:20 PM – 1:10 PM

CHOOSE ONE OF 2 SESSIONS

Dashboards and Reporting: Power BI and the Live Management Report

Computer Software and Applications · Intermediate · 1 CPE

Connecting to the ERP and sub-ledgers to build reports leadership uses and determining when to use Excel versus BI tools.

- Identify the specific criteria that determine whether a report is better suited for Excel or a business intelligence tool like Power BI.
- Describe the process of connecting Power BI to ERP systems and sub-ledgers to establish a live data connection.
- Recognize the fundamental design principles required to build a management dashboard that leadership can use for decision-making.
- Explain the workflow for transitioning a static monthly reporting package into a dynamic, automated environment.

Prerequisites: Practical experience using Excel for financial reporting and a basic familiarity with ERP data structures. · Advance preparation: Experience with basic data tables and an understanding of the firm's monthly financial reporting package.

Connecting the Stack: Integrations, APIs, and iPaaS Without Code

Information Technology · Intermediate · 1 CPE

Methods for getting expense tools, CRM, payroll, and banking systems to talk to the ERP via native integrations or middleware.

- Identify common friction points and data silos within a standard finance technology stack.
- Distinguish between native software integrations, direct API connections, and iPaaS middleware solutions.
- Evaluate the security and control requirements for automated data transfers between financial systems.
- Assess the feasibility of implementing no-code automation tools to replace manual imports and exports.

Prerequisites: A basic understanding of modern cloud-based business software and the standard accounting cycle. · Advance preparation: None

1:10 PM – 1:20 PM Break

1:20 PM – 2:10 PM CHOOSE ONE OF 2 SESSIONS

Payment Fraud and the Finance Department: BEC, Wire Redirection, and Vendor Impersonation

Information Technology · Intermediate · 1 CPE

Covers verification protocols, approval controls, and deepfake-enabled requests, plus immediate response steps after a fraudulent payment.

- Identify common indicators of business email compromise and vendor impersonation attempts.
- Evaluate the risks that deepfake audio and video tools pose to existing verbal verification controls.
- Design a multi-factor approval workflow for changes to sensitive vendor payment data.
- Execute the immediate technical and legal response steps required after a fraudulent payment occurs.

Prerequisites: Experience with accounts payable processes or corporate treasury functions. · Advance preparation: Review current internal payment authorization workflows and incident response plans.

Controls in an Automated Environment

Accounting · Intermediate · 1 CPE

Managing service accounts, segregation of duties, and change management when workflows run themselves, including documenting automated controls.

- Identify the unique security risks associated with service accounts and non-human identities in automated workflows.
- Apply segregation of duties principles to automated processes where multiple transaction steps are consolidated.
- Establish a framework for documenting automated controls that satisfies both internal oversight and external audit requirements.
- Implement change management procedures that prevent unauthorized modifications to automated financial logic.

Prerequisites: A foundational understanding of internal control frameworks and basic experience with automated finance workflows. · Advance preparation: Review current internal control documentation related to automated workflows and system access logs.

2:10 PM – 2:20 PM Break

2:20 PM – 4:00 PM

AI in the Finance Department: Where It Works and Where It Doesn't

Information Technology · Intermediate · 2 CPE

Practical application for variance commentary, forecasting, and invoice extraction. Discusses agentic tools, necessary review processes, and CFO expectations.

- Identify specific finance workflows where current AI tools provide measurable efficiency gains.
- Evaluate the risks of using automated commentary in financial reporting and how to mitigate them.
- Distinguish between traditional automation and agentic tools within the context of invoice processing.
- Design a review framework that ensures data integrity when using AI-generated forecasts.

Prerequisites: A basic understanding of modern finance workflows and exposure to standard reporting cycles. · 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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