

CPE Today · 2027 K2 Technology Conferences

The 2032 Roadmap: Future-Proofing Financial Architecture

Emerging Infrastructure and Identity Assurance

October 27, 2027	8 CPE	1 day
Live online · Central Time	Credits, proposed	Group Internet Based

About the Conference

This conference addresses the technical realities facing finance professionals over the next decade. Rather than focusing on cyclical trends, the curriculum examines the foundational changes in how firms verify identity, secure data, and report on digital assets. Participants will gain a technical understanding of agentic AI within the Microsoft Power Platform and the implementation of phishing-resistant authentication using FIDO2 standards.

The program also covers critical regulatory and security shifts, including the implementation of ASU 2023-08 for fair-value crypto accounting and the NIST standards for post-quantum cryptography. Leaders will learn to identify 'hard trends' in real-time data flow while managing the immediate risks posed by IoT devices in the office and remote work environments. This is a day of technical instruction designed to help practitioners build a roadmap for the 2032 cryptographic and identity deadlines.

Who Should Attend

- Controllers managing the transition to fair-value accounting for digital assets.
- Firm leaders needing to distinguish between scalable innovations and technology hype.
- IT-focused CPAs tasked with moving their organizations toward passwordless environments.
- Finance executives responsible for long-term hardware and security replacement cycles.

What You'll Take Away

- Build agentic workflows using Microsoft Power Platform to automate ERP updates and client communications.
- Implement fair-value measurement and disclosure requirements for corporate crypto holdings under ASU 2023-08.
- Deploy phishing-resistant authentication using FIDO2 and passkeys to prevent executive email compromise.
- Apply VLAN segmentation and hardware inventory strategies to secure IoT devices and office infrastructure.
- Integrate OIDC4IA and W3C Verifiable Credentials to verify identities using government-issued digital wallets.
- Plan hardware and audit trail updates to meet NIST post-quantum cryptography standards.

Proposed Agenda

Day One

8:00 AM – 9:40 AM

The Next Ten Years Won't Look Like the Last Ten

Business Management & Organization · Basic · 2 CPE

This opening session moves beyond the 'shiny object' syndrome of the 2010s to analyze the structural shifts in professional technology. It examines why certain innovations like OCR and cloud accounting became foundational while others, like private blockchain for mid-market firms, failed to scale. For the firm leader or corporate controller, this session provides a framework for 'pattern...

- Analyze the structural shifts in professional technology over the past decade.
- Explain why innovations such as OCR and cloud accounting became foundational while others, such as private blockchain for mid-market firms, failed to scale.
- Apply a pattern-recognition framework to distinguish cyclical hype from lasting trends.
- Evaluate agentic AI and real-time data flow as trends that will shape the next decade.

Prerequisites: None · Advance preparation: None

9:40 AM – 9:50 AM Break

9:50 AM – 11:30 AM

The 2027 Automation Roadmap: Integration and Agentic AI

Information Technology · Basic · 2 CPE

The next era of productivity isn't about simple task completion; it's about shifting from reactive scripts to autonomous systems. By 2027, the most successful firms won't just use generative tools for drafting emails. They'll employ agentic AI to manage entire lifecycles across their software stacks. This course examines how practitioners can prepare for this shift by building a cohesive integration strategy...

- Distinguish between traditional linear automation and the emerging capabilities of agentic AI systems.
- Identify the core infrastructure requirements for integrating autonomous agents into existing enterprise resource planning software.
- Evaluate the risks associated with autonomous decision-making and establish a framework for human-in-the-loop governance.
- Develop a three-year roadmap for scaling intelligent automation from pilot projects to firm-wide adoption.

Prerequisites: Prior experience with basic workflow automation or low-code development platforms. · Advance preparation: Participants should have a working knowledge of current cloud-based automation tools and familiarity with their organization's data architecture.

11:30 AM – 12:20 PM Lunch

12:20 PM – 1:20 PM

CHOOSE ONE OF 2 SESSIONS

Everything Is a Computer Now: IoT in the Office and the Living Room

Information Technology · Intermediate · 1.2 CPE

Your office coffee maker has a MAC address, your HVAC system is talking to a server in another country, and your smart lightbulbs are a bridge to your financial data. This session cuts through the 'smart' marketing to look at the cold, hard security reality of the Internet of Things. We will explore how everyday devices—from the conference room speaker to the home router used by remote staff—become unmonitored...

- Identify the connected devices in the office and in remote staff homes that can become entry points.
- Explain how unmonitored IoT devices let attackers move laterally toward financial data.
- Design a device isolation strategy using VLAN segmentation.
- Develop a hardware inventory that accounts for shadow IoT devices.

Prerequisites: A basic understanding of office networks, routers, and Wi-Fi configuration. · Advance preparation: None

Proving Who's on the Other End: Identity Assurance and Verifiable Credentials

Information Technology · Intermediate · 1.2 CPE

As deepfakes render traditional video-call 'liveness' checks obsolete, firms must pivot to cryptographic identity proofing. This session explores the transition from manual document scans to the OpenID Connect 4 Identity Assurance (OIDC4IA) standard and Verifiable Digital Credentials (VDCs). We will examine how practitioners can use the W3C Verifiable Credentials Data Model 2.0 to ingest high-assurance identity...

- Explain why deepfakes have made video-call liveness checks unreliable.
- Describe the move from manual document scans to the OpenID Connect for Identity Assurance standard and verifiable digital credentials.
- Evaluate how the W3C Verifiable Credentials Data Model 2.0 supports high-assurance identity claims from government-issued digital wallets.
- Apply cryptographic identity proofing to remote onboarding in high-risk environments.

Prerequisites: Familiarity with identity verification and remote client onboarding procedures. · Advance preparation: None

---

1:10 PM – 1:20 PM Break

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

ASU 2023-08 and Beyond: The New Reality of Fair Value Crypto Accounting

Accounting · Update · 1 CPE

The era of cost-less-impairment for digital assets is over. For fiscal years beginning after December 15, 2024, most corporate crypto holdings must be measured at fair value with changes recognized in net income. This session provides a technical deep dive into the implementation of ASU 2023-08, including the new presentation requirements for the balance sheet and the specific disclosure nuances for 'significant'...

- Apply the fair value measurement requirements of ASU 2023-08 to in-scope crypto assets.
- Determine the balance sheet presentation requirements for crypto assets measured at fair value.
- Identify the disclosure requirements for significant crypto asset holdings.
- Evaluate when a stablecoin qualifies as a cash equivalent in the statement of cash flows.

Prerequisites: A working knowledge of US GAAP for intangible assets and the statement of cash flows. · Advance preparation: None

Beyond the Password: FIDO2, Passkeys, and the Death of Phishing

Information Technology · Intermediate · 1 CPE

Traditional MFA (SMS and Push) is now regularly bypassed by 'adversary-in-the-middle' attacks. This session looks at the shift toward phishing-resistant authentication using FIDO2 and hardware security keys (like YubiKeys) or platform passkeys. We will demonstrate how a small firm can realistically rollout a passwordless environment, the impact on user experience, and why this single change is the most effective...

- Explain how adversary-in-the-middle attacks bypass SMS and push-based MFA.
- Compare phishing-resistant options, including FIDO2 hardware security keys and platform passkeys.
- Plan a realistic passwordless rollout for a small firm.
- Evaluate the effect of passwordless authentication on user experience and email compromise risk.

Prerequisites: Experience administering multi-factor authentication for an organization. · Advance preparation: None

2:10 PM – 2:20 PM Break

2:20 PM – 4:00 PM

The Five-Year Fuse: Navigating the 2032 Cryptographic and Identity Deadlines

Information Technology · Intermediate · 2 CPE

The clock is ticking on four specific technology 'detonations' that will render current financial architectures obsolete by 2032. This session provides a high-altitude roadmap for leadership and practitioners to address the transition to Post-Quantum Cryptography (PQC) following the NIST FIPS 203/204/205 standards, the mandatory shift to e-invoicing and instant settlement rails, and the collapse of traditional...

- Identify the technology deadlines expected to affect financial architectures by 2032.
- Explain the transition to post-quantum cryptography under NIST FIPS 203, 204, and 205.
- Evaluate the effect of mandatory e-invoicing and instant settlement rails on financial systems.
- Assess the shift from traditional identity silos to decentralized wallets under eIDAS 2.0.

Prerequisites: A general understanding of encryption, electronic payments, and digital identity. · 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/the-2032-roadmap