

PROFESSIONAL EDUCATION COURSE

TRUST IN THE AGE OF AI:

Security, Ethics & Fraud for CPA Firms



● CPE Today · 2027 K2 Technology Conferences

Trust in the Age of AI: Security, Ethics & Fraud for CPA Firms

Security

November 3, 2027

Live online · Central Time

8 CPE

Credits, proposed

1 day

Group Internet Based

Proposed Agenda

Day One

8:00 AM – 9:40
AM

The Threat Landscape for CPA Firms

2 CPE

CPA firms hold exactly what attackers want — tax data, bank credentials, and client trust — and the attacks are getting faster and more convincing. This keynote maps the threats firms face today, from ransomware and business email compromise to credential theft, vendor and supply-chain breaches, and deepfake impersonation. You'll leave knowing what IRS Publication 4557 and the FTC Safeguards Rule actually require...

Prerequisites: None · Advance preparation: None

9:40 AM – 9:50
AM

Break

9:50 AM – 11:30 AM

CHOOSE ONE OF 2 SESSIONS

Ethics in a Digital Practice

2 CPE

Cloud platforms, outside IT providers, and AI tools raise ethics questions the profession's rules were not originally written for. This session applies the AICPA Code's confidentiality provisions and IRC Section 7216 consent requirements to everyday technology decisions, examines independence considerations when working with tech vendors, and addresses when and how to disclose AI use to clients. Participants will...

Prerequisites: None · Advance preparation: None

Build or Refresh Your WISP

2 CPE

Every tax preparer is required to have a written information security plan, but many firms have one that is outdated, generic, or missing entirely. In this hands-on workshop, participants build or update their WISP step by step, conduct a practical risk assessment of their own firm, and draft an incident response playbook. You'll leave with working documents tailored to your practice, not just a template.

Prerequisites: None · Advance preparation: None

11:30 AM – 12:20 PM

Lunch

12:20 PM – 1:10 PM

CHOOSE ONE OF 2 SESSIONS

AI Risks and Concerns

1 CPE

AI tools are already in your firm, whether or not you've approved them. This session examines the real risks — client data leaking into public models, staff using unsanctioned "shadow AI" tools, and hallucinated output making its way into client deliverables. Participants will learn the essential elements of a firm AI policy that enables productive use while protecting clients and the firm.

Prerequisites: None · Advance preparation: None

Identity and Access

1 CPE

Most breaches start with a stolen or weak credential, which makes identity the front line of firm security. This session covers multi-factor authentication done right, the shift to passkeys, deploying a firm-wide password manager, and closing the access gaps left when staff and contractors depart. You'll leave with a practical checklist for tightening who can get into what across your firm's systems.

Prerequisites: None · Advance preparation: None

1:10 PM – 1:20 PM

Break

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

Deepfakes and Social Engineering

1 CPE

A few seconds of recorded audio is now enough to clone a partner's voice, and attackers are using it to authorize wires and extract client data. This session shows how voice cloning, fake executive requests, and AI-polished phishing actually work, with real-world examples targeting accounting firms. Participants will learn verification procedures that stop these attacks regardless of how convincing the request appears.

Prerequisites: None · Advance preparation: None

Securing Client Communications

1 CPE

Every document exchanged with a client is a potential exposure point, and plain email attachments remain the norm at too many firms. This session compares secure client portals, email encryption options, and e-signature platforms, and establishes file-sharing practices that protect sensitive data without frustrating clients. You'll leave with clear standards for how your firm sends, receives, and stores client...

Prerequisites: None · Advance preparation: None

2:10 PM – 2:20 PM Break

2:20 PM – 4:00 PM Fraud in the Age of AI

2 CPE

Old fraud schemes are being supercharged by new technology, and CPAs are often the first to see the evidence. This closing keynote walks through today's most damaging schemes — payment diversion, check washing, payroll redirect, synthetic vendors, and tax identity theft — and shows how AI makes each faster and harder to spot. Participants will learn the red flags to watch for and the internal controls that...

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/trust-in-the-age-of-ai>