

## **Agenda- Las Vegas**

### **Wednesday, November 1, 2017**

8:00am-8:30am Registration/Continental Breakfast

8:30-8:35-Welcome- Jenny Allen

8:35am-10:00am- Understanding your Disc Profile-David Chavez, CPA (85 minutes)

10:00-10:15am-Break

10:15-12:00pm- Goal Setting-David Chavez, CPA (105 minutes)

12pm-1pm-Lunch and Networking

1:00-2:30pm- Communicating Upstream -Lindsay Stevenson, CPA, CGMA (90 minutes)

2:30-2:45pm-Break

2:45-4:30pm- Collaboration -Lindsay Stevenson, CPA, CGMA (105 minutes)

## **Agenda- Reno**

### **Thursday, November 2, 2017**

8:00am-8:30am Registration/Continental Breakfast

8:30-8:35-Welcome- Brent Forbush

8:35am- 10:05am- Communicating Upstream -Lindsay Stevenson, CPA, CGMA (90 minutes)

10:05am-10:20am-Break

10:20am-12:05pm- Collaboration-Lindsay Stevenson, CPA, CGMA (105 minutes)

12:05pm-1:05pm-Lunch and Networking

1:05pm-2:30pm- Understanding your Disc Profile- David Chavez, CPA (85 minutes)

2:30pm-2:45pm-Break

2:45pm-4:30pm- Goal Setting-David Chavez, CPA (105 minutes)

## **Session Titles and Descriptions**

**Mastering the Currents of Upstream Communication** – Have you ever felt you don't achieve your desired results when communicating with partners and executive management? Whether it is technical or not, communicating with top members of management can be a significant challenge. Overcome the frustrations, misconceptions and miscommunications that are often associated with upstream communication. We will explore key factors that drive management to “tune in” to communication from members of their team and spend time working through your most challenging upstream communications.

**Igniting Inspiration: How to Inspire Collaboration Among Teams** – Have you ever wondered how some teams seem to operate in perfect harmony? They consistently meet deadlines, produce high-quality products and appear to genuinely enjoy working together. What is the secret to their success? Think collaboration! Not just the buzz word - meaningful interactions that engage team members and empower success. In this interactive session, we will explore what collaboration really looks like and how to inspire our teams to engage in collaboration on every project. The end result – a more effective team and a lot of fun!

## **Speaker Bios**

**Lindsay Stevenson, CPA, CGMA, VP-Finance, 1st Financial Bank USA** - Lindsay is involved in a number of committees at the AICPA, ASCPA and SDCPA in addition to joining the AICPA General Council in 2018. She is the 2017 AICPA Outstanding Young CPA Award recipient and Vice Chair of the AICPA Young Members Leadership Committee. As a CPA, CGMA Lindsay is passionate about helping individuals tap into their potential to positively impact the innovation and success of their organization and their professions at large. She enjoys sharing her knowledge on influence, motherhood, and leadership with others by speaking and writing for the AICPA, State Societies and other organizations. Lindsay is also a lover of great mystery novels and a shameless braggart about her three boys. She graduated from Gonzaga University with a BA in Accounting and is still a die-hard Zags basketball fan!

**David Chavez, CPA, CEO, Assured Strategies** - David, founded strategic planning executive coaching firm, Assured Strategies, in 2007. Chavez is also a Gazelles Certified International Coach. Having worked with thousands of companies and witnessing their financial and strategic planning processes in his own highly successful firm, Chavez & Koch Business Consultants and CPAs, Chavez is an expert in understanding what leaders must do—and avoid—in order to propel their organizations to the pinnacles of success they desire. Chavez now spends his time guiding executives in developing their strategic thinking and execution planning while helping their teams grow closer and guiding them through the change management process. He also facilitates, as a Vistage International Chair, peer-to-peer guidance for C-Level executives wanting to become better leaders, make better decisions and ultimately achieve better results. Chavez operates Assured Strategies from its Las Vegas headquarters and travels throughout North America as a certified executive coach.