

“What Every Citizen Should Know About the US Government’s Financial Statements”

Date: Wednesday, February 3, 2021 **Time:** 9:00 am – 10:00 am **Format:** Lecture – 1 hour
Presenters: Greg Anton, CPA, CGMA
Location: Online Virtual Presentation via Zoom **Phone:** 419-764-4387

PROGRAM DESCRIPTION:

What’s at Stake? The CPA Profession on Federal Fiscal Responsibility offers guidance on how the U.S. government’s financial statements can be used for greater understanding of the nation’s fiscal health. Greg Anton, CPA, CGMA, Past Chairman, AICPA Board of Directors, and the founder of the Institute’s “What’s at Stake” initiative, offers a non-partisan and clear analysis into why the financial statements provide a different perspective compared to the annual budget.

With its "What's at Stake" initiative, the Institute seeks to call attention to how and why the financial sustainability of our country is at stake. The CPA profession calls on both policymakers and the public to engage in a national dialogue to improve our country’s fiscal health.

PROGRAM OUTLINE

The following time components have been assigned to this topic to allow the presenters sufficient time to cover the subject matter.

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| 1. The role of CPAs | 9:00 – 9:10 am |
| 2. Overview of the Federal Budget | 9:10 – 9:20 am |
| 3. US Financial Statements | 9:20 – 9:35 am |
| 4. Insight into Liabilities and Obligations | 9:35 – 9:50 am |
| 5. Solutions to the Debt Crisis | 9:50 – 10:00 am |

COURSE OBJECTIVES/PURPOSE:

After this course, participants should have a good understanding of the following:

- US Budget Deficit
- US Financial Statements
- Tax Policy
- Solutions to the Debt Crisis

LEVEL OF INSTRUCTION: Advanced

ABOUT THE PRESENTER:



I am a past Chairman of the AICPA, and a founding partner of ACM LLP which grew 10-fold and rejoined BDO in 2020 after starting my career there in 1987. I served six years on the Board of the AICPA including Chairman of the Board in 2011/12. Honored to be a recipient of the AICPA's 2015 Gold Medal Award for Distinguished Service, the highest award granted by the AICPA and is given to CPAs who have made major contributions to the CPA profession. Founded the AICPA's What's at Stake? The CPA Profession's initiative on Federal Fiscal Responsibility which offers non-partisan guidance on how the U.S. government's financial statements can be used for greater understanding of the nation's fiscal health. Recognized as one of the Top Most Influential People in Accounting by Accounting Today. I am also a past Chair of the Colorado Society of CPA's Board of Directors and served on the International Federation of Accountants (IFAC) nominating committee.

Past President of the University of Northern Colorado (UNC) Alumni Association and past chair of the UNC School of Accountancy Advisory Board. Co-chaired the Colorado Society of CPA's Foundation Centennial Scholarship Campaign which successfully raised over \$1.0 million for college accounting scholarships. Recipient of the Bill Daniels Ethical Business Leader of the Year Award and a recipient of the Honored Alumni Award from UNC for contributions to business and have also been recognized as a top business news maker by the Denver Business Journal. Numerous community and charitable involvements including: Junior Achievement Board Member, Mile High United Way Trustee, Wish for Wheels, Board Member, Colorado Concern Member, founding member current Board Member and past Chairman of Executives Partnering to Invest in Children (EPIC), and Wish of a Lifetime past Board Member.

Through May 2018 I served on the Board of Directors of Citywide Banks, a subsidiary of Heartland Financial USA, Inc. ("Heartland"), a multibillion dollar financial services company. Prior to Heartland's acquisition of Centennial Bank in February 2016, I served on the Board of Directors and chaired the audit committee of CIC Bancshares, the parent company of Centennial Bank. Through June 2019 (sale of company) I served on the Board of Directors of WeeSchool, Inc a private Denver based early education technology company. Through May 2020 I also serve on the Board of Directors of EMS Genomics, LLC a private Nevada based biosciences company. Beginning in January 2019 I became a Manager of Cosyntris Advisory Network, LLC.

INSTRUCTOR CRITERIA FOR CLASSROOM:

Instructors are selected, based on these criteria:

- Experience
- Knowledge & expertise on topic
- Teaching experience
- Professional credentials

Our instructors are well respected in the industry, with many years of work experience. Many are published authors who have been requested to appear on radio and television programs because of their expertise and they have presented programs across the country to attorneys, CPAs, CFPs, Trust Officers and financial planning professionals.

PROVIDER:

The Association Office – 7517 Wind River Drive, Sylvania OH 43560 Phone: 419-764-4387
Email: theassocoffice@gmail.com
OH Insurance Provider: #659 MI Insurance Provider: #0567 IN Insurance Provider: #82722
CFP Board of Standards Sponsor: #3038 OH Accountancy Board: #0268
Provider will apply for Ohio CLE credits for most programs