



Featured Sessions

Explore practical, firm-focused sessions designed to help you strengthen operations, develop leaders, build scalable systems, and bring actionable ideas back to your team.

MONDAY, NOVEMBER 2 | 9:00 AM - 5:00 PM

Blueprint University

Blueprint University is a lecture-style session that will teach core PASBA principles. This session is required for new members and first-time conference attendees.

Blueprint Mastery

Blueprint Mastery provides additional training to newer members as well as support and best practices for tenured members.

Value Pricing & Fee Increase University

Value Pricing & Fee Increasing University is a participant-centered workshop created to assist PASBA members with the fee increase process.

This course is optional and has prerequisites of Blueprint University and Blueprint Mastery.

TUESDAY, NOVEMBER 3 | GENERAL SESSIONS

9:10 AM - 10:10AM

Keynote Speaker: Ryan Gray - The 6 Types of Working Genius, Part 1

Join Ryan Gray of Working Genius for a dynamic two-part experience that will help you discover your natural strengths, improve collaboration, and understand the key to building more productive teams. Through an inspiring keynote followed by an interactive application session, you'll leave with personalized insights and practical strategies you can immediately use to improve meetings, communication, workflows, and overall team performance.

10:30 AM - 11:30 AM

Keynote Speaker: Ryan Gray - The 6 Types of Working Genius, Workshop

1:00 PM - 1:50 PM

The PASBA Model: Why It Works and How to Run It

Whether you're brand new to the model, drifting from it, or recommitting after years of evolution, this panel breaks down what makes the PASBA model timeless and how the tools around it keep changing. Panelists at different stages share what's working, what they had to fix, and what they wish they'd done sooner.

Speakers: Tony Mauro, John Malone, Clay Hamlin, Dario Zanichelli

2:15 PM - 3:05 PM

Building a Firm Worth Buying: Scalable Systems, Owner Independence, and Enterprise Value

Your firm should run whether you're in the building or not. This panel covers the systems, staffing, and structure decisions that create real enterprise value, from getting the owner out of production to building something a buyer or successor would actually want.

Speakers: Tyler Thompson, David Bradsher, Bert Doerhoff, Craig Hausz

3:15 PM - 4:15 PM

Running Your Firm on a System

A strong management system can help firms improve accountability, alignment, execution, and long-term growth. This panel explores why firms need a management framework, the common elements of successful systems, challenges firms face during implementation, and how to choose an approach that fits your organization and stick with it.

Speakers: Kurt Rickhoff, Eric Joern, Jason Eger

WEDNESDAY, NOVEMBER 4 | BREAKOUTS | 9:00 AM - 9:50 AM

From Doer to Leader: Developing Managers Who Actually Manage

Most firm managers got promoted because they were great at the work, not because they knew how to lead people. This session covers how to identify management potential, build accountability without micromanaging, and develop the managers your firm needs to scale.

Speakers: Tyler Thompson, Craig Hausz

Staffing Your Firm in 2026: Onshore

The staffing playbook has changed. This session compares real firm experiences with local hires, offshore teams, contractors, and blended models, covering cost, quality, management overhead, and what actually scales without breaking your culture.

Speakers: Chris Roberts, Mike Shaeffer

AI in Action: Production Use (Onboarding, Tax, Accounting)

See how firms are leveraging AI throughout client onboarding, tax preparation, accounting services, and production workflows. Through real-world examples, you'll learn what tools firms are using, how they implemented them, the efficiencies they've gained, and lessons learned along the way. Whether you're just getting started or looking to expand your AI strategy, this session will provide practical ideas to improve productivity and deliver better client outcomes.

Speakers: Collin Kane, Adam Decker, Nataly Zamora

Paying and Keeping Your Team: Compensation Design That Drives Performance

What should you pay? How should you structure bonuses? When do incentives backfire? This panel covers compensation benchmarks, incentive models that actually change behavior, and how to build a pay structure that attracts and retains without killing margins.

Speakers: Sarah Berry, John Drawdy

AI in Action: Operations Use (Management, Marketing, HR)

AI is transforming far more than tax and accounting workflows. This session explores practical ways firms are using AI to streamline operations across management, marketing, HR, and day-to-day administration, including improving efficiencies, enhancing internal communications, updating policies and handbooks, and reducing time spent on repetitive tasks.

Speakers: Saad Abbas, Hope St Clair, Jack Thompson

Optimizing M2C2: Getting More from Your Communication Rhythm

The M2C2 model (Monthly Close, Monthly Communication) is the engine of client service delivery. This panel digs into what high-performing firms do differently, including faster closes, better client conversations, and the metrics that tell you if your rhythm is working.

Speakers: Scott Patterson

AI-Powered Financial Analysis: Automating What Used to Take Hours

Live demonstrations of AI tools analyzing financial statements, flagging anomalies, generating client-ready commentary, and automating the review process. See what's possible today and what's coming next.

Speakers: Daniel Lavinder, Jake Andrews

Building a Training System That Scales with Your Firm

Most firms train by shadowing and hope. This session covers how to build repeatable training programs, onboard new hires faster, develop technical and soft skills simultaneously, and measure whether your training is actually working.

Speakers: Eric Joern, Jason Eger

Stop Being the Bottleneck: A Practical Guide to Letting Go

You know you need to delegate. This session gets specific, including what to hand off first, how to transfer decision-making authority without losing quality, building accountability systems, and the mindset shift that makes it stick.

Speakers: Renee Daggett, Brian Paulson

Career Pathing in a Small Firm: Keeping Great People Without a Corporate Ladder

Small firms can't offer 10 levels of promotion. So how do you keep ambitious people engaged? This session covers creative career paths, growth plans that don't require new titles, and engagement strategies that work when your team is under 50.

Speakers: Clay Hamlin, Rachel McClaran

Numbers That Matter: KPIs that Actually Drive Performance

What should you measure? How often? And what do you do when the numbers are bad? This panel walks through the KPIs that matter most for PASBA firms, the dashboards and tools that make tracking sustainable, and how to build a culture of accountability around data.

Speakers: Kim Corneliuson, Frank Fiore

Getting Your Team to Actually Use the New Tools: Change Management for AI and Tech

Buying the tool is easy. Getting your team to use it is the hard part. This session covers the human side of technology adoption, including overcoming resistance, building internal champions, managing the learning curve, and knowing when to push versus when to pause.

Speakers: Tim McElravy, Matt Patrick

WEDNESDAY, NOVEMBER 4 | BREAKOUTS | 3:00 PM - 4:00 PM

From Pilot to Standard: Scaling AI Across Your Entire Firm

You've tested AI in a few workflows. Now what? This session covers how to move from one-off experiments to firm-wide adoption, including governance, training, measuring ROI, and building the infrastructure so AI becomes how your firm works, not just something a few people try.

Speakers: Eric Joern, Erin Andrews

Who Will Train the Next Accountant? How AI is Rewriting the Accounting Profession's Apprenticeship Model

If AI handles the tasks that used to train junior staff, how do you develop the next generation? This session tackles the apprenticeship gap, including new training models, accelerated development paths, and rethinking what "learning the business" looks like when the repetitive work is automated.

Speakers: Vince Howard

Strategy to Execution: Turning Conference Ideas Into 90-Day Results

You'll leave this conference with a dozen ideas. This session helps you pick the right ones and actually implement them. Practical frameworks for prioritizing, building 90-day action plans, assigning ownership, and creating accountability to follow through.

Speakers: Jason Eger, Tom Cimoric

THURSDAY, NOVEMBER 5 | 9:00 AM - 12:00 PM

Practice Size Discussion Groups

These interactive discussion sessions are organized by practice size (small, medium, or large) based on the number of monthly clients your firm serves. Prior to the conference, attendees submit discussion topics, and each group focuses on the issues and challenges most relevant to firms of a similar size.

New Members Only: PASBA Fundamentals

First-time owner attendees: This session will focus on the PASBA model and will help you determine what your priorities should be for implementation upon returning to the office.

PASBA is certified through NASBA for continuing education credits for CPAs only.

Prerequisites: Small Business Accounting Firm Ownership

Who Should Attend: The Conference is open to Prospective and Active PASBA Members

Advanced Preparation: None

Program Level: Basic

Learning Objectives:

- Identify key principles and management strategies for building a more scalable, efficient, and sustainable accounting firm.
- Evaluate staffing, compensation, career development, training, and management practices to improve employee performance, engagement, and retention.
- Apply practical strategies for integrating artificial intelligence and other technology into production, operations, financial analysis, and firm-wide workflows.
- Develop actionable plans for implementing management systems, communication rhythms, performance metrics, and technology initiatives to achieve measurable results within the firm.

Delivery Method: Group Live

Credits & Fields of Study: Upon completion, attendees are eligible for:

- Business Management & Organization (up to **44.4** CPE)
- Communications & Marketing (up to **1** CPE)
- Information Technology (up to **6.6** CPE)
- Personnel/Human Resources (up to **5.2** CPE)

Each eligible attendee can earn up to 21.6 credits.*

57.2 total credits are offered.*

*The number of CPE credits earned will vary depending on the sessions attended. **CPE credits are available for CPAs only.**

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