

# 2019 Fall Symposium

Seizing Opportunities in a Thriving Economy

October 17  
2019

## Event Details

Oct. 17, 2019  
8:00 a.m. - 5:30 p.m.

Hyatt Houston Galleria  
2626 Sage Rd., Houston, TX 77056

**Registration**  
Visit [bit.ly/2019fallsymposium](http://bit.ly/2019fallsymposium)

**CPE Credit**  
Earn up to 6 CPE credits

## Agenda Overview

**Registration, Breakfast and Opening Remarks**  
8:00 a.m. - 8:35 a.m.

**General Session**  
8:35 a.m. - 9:30 a.m.

**General Session**  
9:45 a.m. - 10:45 a.m.

**Breakout Sessions**  
11:00 a.m. - 12:00 p.m.

**Lunch and General Session**  
12:15 p.m. - 1:15 p.m.

**Breakout Sessions**  
1:30 p.m. - 2:30 p.m.

**General Session and Closing Remarks**  
2:45 p.m. - 3:45 p.m.

**Cocktail Reception**  
3:45 p.m. - 5:30 p.m.

●●● Be sure to join us for our cocktail reception following the conference featuring cigar rolling and music!

 **Doeren  
Mayhew**  
CPAs AND  
ADVISORS

**BBVA**

# Session Topics

## Navigating a New Era of Taxes

Moderator: *Chris Masters – Doeren Mayhew*

Tax Panelists: *Chris Haas, Lynh Nguyen and Rolando Garcia – Doeren Mayhew*

It's a new era of taxation in the United States, from the Tax Cuts and Jobs Act going into full effect this year, the Wayfair fallout and its impact on multi-state taxation, and more. In this session, Doeren Mayhew's tax advisors will share insight into key areas impacting businesses and individuals in today's tax environment, planning strategies to consider before year-end and what lurks on the horizon for U.S. taxpayers.

## Assessing Your Accounting System for the Big Picture

George Martin – Doeren Mayhew, Bryan Gregory – Aldridge

Is your accounting system functioning in a way that helps you achieve growth and identify opportunities? This session will highlight essential areas to analyze in your accounting system and how to assess whether it is working to your business advantage. Walk away with ideas and tips that will help determine whether to keep your accounting system or explore alternative options.

## Detecting Fraud in Today's Cybersecurity Environment

Madhu Maganti – Doeren Mayhew, James Morrison – Federal Bureau of Investigation

Are you aware of your organization's risk for fraud? Do you have the proper internal controls in place to detect it? In this session, our cybersecurity advisors will share ideas to prevent and detect fraud, ways to develop an effective cybersecurity culture and how to ensure your organization is protected against future threats.

## Seller Strategies to Maximize Your Deal

Jennifer Mailhes and Will Rosell – Doeren Mayhew Capital Advisors

The right time to sell a business depends on a variety of factors, but there are some strategies business owners can put into place to maximize the deal when the right opportunity knocks. Our investment bankers at Doeren Mayhew Capital Advisors will highlight the business sale process, including ways to prepare, what to have ready and do when approaching a buyer, the steps involved, exit options and more.

## CFO Panel - Working Capital Optimization (Tips, Tricks and Techniques)

Moderator: *Eric Kahn – BBVA*

CFO Panelists: *Colin Grover – Cyanco, Joseph Chiavone – Wisenbaker Builder Services, Nicolas Folgado – Chemium, Tonya Wilkins – Rilco Manufacturing*

BBVA's Eric Khan will provide a lender's perspective as he moderates a panel of CFOs who will share the fundamentals of working capital management and proven strategies to help optimize it. Panelists will highlight key performance measures, essentials of credit risk management, optimizing inventories, receivables and accounts payable, accelerating the 'cash-to-cash' process, means and cost of funding business operations, and more.

## U.S. Economic Forecast at a Glance

Boyd Nash-Stacey – BBVA

Senior Economist Boyd Nash-Stacey will share insight into the U.S. economic forecast and regional activity, as well as trends shaping employment figures, global trade activity, interest rates and more.

## Estate Planning Essentials for Before and After the Sale

Randy Bond and Ray Black – BBVA; Anna Kavanaugh and Bryan Baker – Baker Williams Matthesen LLP

Whether a business exit is two or 10 years from now, it's never too soon to explore options to ensure your estate is preserved and protected. In this session, panelists will discuss pre-sale wealth preservation strategies, the intricate relationship between partnership/shareholder agreements and estate planning documents, post-sale considerations and challenges business owners often face, and insight into the administration of wills and trusts following death or disability.

## The 4 T's Impacting Global Trade

Andrew Pidgirsky – Lewis Brisbois; Emilio Gilberto – BBVA; Rolando Garcia – Doeren Mayhew

Trade finance, taxes, tariffs and threats such as fraud are critical factors impacting today's global trade activity, but what measures can you take to help ensure your business is protected and staying ahead of the curve? Hear from international experts, as they further dive into these four T's and how to avoid getting caught in the global trade trap.

## Register Today

Visit [bit.ly/2019fallsymposium](http://bit.ly/2019fallsymposium) to register.

## CPE Information

Earn over 6 CPE credits. No advance preparation or prerequisites required.

### Who Should Attend

CEOs, CFOs, CISOs, Business Owners and Controllers

### Program Level

Overview/Basic

### Delivery Method

Group-Live

### Fields of Study

Specialized Knowledge, Tax and Economics

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