

# 29th Annual North Alabama CDPA PC Accounting Forum



Friday, July 23, 2021

LIVE WEBINAR  
VIA ZOOM



## CDPA<sub>PC</sub>

CERTIFIED PUBLIC ACCOUNTANTS

UNA is an Equal Opportunity/Equal Access Institution  
[www.una.edu/professionaldevelopment](http://www.una.edu/professionaldevelopment)

or (256) 765-4862

Call 1-800-825-5862, Ext. 4862

*Register Today!*

University of North Alabama  
Center for Learning  
@ Professional Development  
UNA Box 5036  
Florence, AL 35632-0001  
(256) 765-4862  
800-825-5862, Ext. 4862

Friday, July 23, 2021 • LIVE WEBINAR VIA ZOOM  
CDPA PC ACCOUNTING FORUM  
29TH ANNUAL NORTH ALABAMA

Non-Profit Organization  
U.S. Postage Paid  
PAID  
Florence, Alabama  
Permit No. 371



# **29TH ANNUAL NORTH ALABAMA CDPA PC ACCOUNTING FORUM**

*Sponsored by UNA Center For Learning and Professional Development  
The Past President's Council, Muscle Shoals Chapter, Institute of Management  
Accountants, and the UNA Department of Accounting & Business Law*

## **AGENDA**

**FRIDAY, JULY 23, 2021 • 8:00 am - 4:00 pm**

**LIVE WEBINAR VIA ZOOM**

**Course Cost: \$125 • Approved for 8.0 hours A&A CPE**

<b>7:45 – 8:00 am</b>	<b>Log In</b>
<b>8:00 am</b>	<b>Welcome &amp; Introductions</b>
<b>8:00 – 9:50 am</b>	<b>FASB Update</b>
<b>9:50 – 10:00 am</b>	<b>Break</b>
<b>10:00 – 10:50 am</b>	<b>Audit &amp; Assurance Update</b>
<b>10:50 – 11:00 am</b>	<b>Break</b>
<b>11:00 – 11:50 am</b>	<b>AICPA Update</b>
<b>11:50 am – 1:00 pm</b>	<b>Lunch</b>
<b>1:00 – 2:50 pm</b>	<b>GASB Update</b>
<b>2:50 – 3:00 pm</b>	<b>Break</b>
<b>3:00 – 3:50 pm</b>	<b>ERISA &amp; Peer Review Updates</b>
<b>3:50 – 4:00 pm</b>	<b>Conference Wrap-up</b>

**MAKE YOUR PLANS  
NOW TO ATTEND  
THIS POPULAR AND  
INFORMATIVE ANNUAL  
ACCOUNTING FORUM!**

This annual seminar was developed twenty-nine years ago to provide a high quality and affordable day of professional development and networking for accounting professionals from throughout Alabama and neighboring states. It is a chance for the accounting community to learn about trends and procedures, directly from the experts. In addition to providing an excellent source of continuing education, a share of the funds generated to the IMA by the Forum are specially designated to be used in the scholarship program. The Muscle Shoals Chapter of the IMA awards a scholarship annually to a deserving senior accounting student at the University of North Alabama.

This will be a day you can't afford to miss! Regular price for the Forum is \$125. Discounts are available for currently enrolled accounting students.

### **UPDATE**

Due to concerns surrounding Covid-19, the

29th Annual North Alabama CDPA PC Accounting Forum will be held July 23 online via Zoom.

Each participant will receive an emailed invitation link and instructions for Zoom. If you would like assistance with Zoom beforehand please contact Meghan Fike at mmfike@una.edu.

## **WHO SHOULD ATTEND**

Anyone involved in the field of accounting, tax or tax law, assurance or consulting; CPAs; field accountants, auditors and internal accountants and their staffs; students studying accounting; attorneys, financial managers and business people who are interested in accounting and finance.

**Registration Online @**  
**[www.una.edu/professionaldevelopment](http://www.una.edu/professionaldevelopment)**

# MEET YOUR SPEAKERS



**MARK ABERNATHY, CPA  
ASSURANCE SENIOR  
MANAGER**

## Practice Specializations

Assurance and accounting services for healthcare entities, government contractors, employee benefit plans, and for-profit companies

## Background

Mark is a Senior Manager for CDPA in their assurance practice section, and has provided accounting, attest, and audit services to nonpublic businesses and organizations for over a decade. His primary focus has been on serving private companies ranging from start-ups to multinational companies. He previously served as ASCPA-Advisory Council Member of the Huntsville Chapter from 2014 to 2017. Mark's extensive experience provides him with the capabilities to advise companies on ways to increase operational efficiencies.

## Education

B.S. –University of Alabama  
M.Acc. –University of Alabama



**JEREMY BLACKBURN, CPA,  
CVA, MAFF, ASSURANCE  
PARTNER / VALUATION  
PARTNER**

## Practice Specializations

Business Valuations, Attestation Services  
Employee Benefit Plan Services & Audits  
Litigation Support Services, Management  
Consulting, Financial Forensics, Personal Financial Planning, Mergers & Acquisitions, and Wealth Management

## Background

Jeremy is a Partner with CDPA and manages the firm's litigation support, financial forensics, valuation, audit, and review practices. He is the firm's lead Certified Valuation Analyst and Master Analyst in Financial Forensics. He is also a licensed Certified Public Accountant in Alabama, Tennessee, and Florida. Jeremy has many years of experience working in the finance and accounting industries, including auditing multi-national companies, income and estate tax issues along with general business consulting, individual financial planning, fraud examinations, litigation support, and business valuation. Prior to joining CDPA, Jeremy was a manager with PricewaterhouseCoopers, auditing benefit plans, large multi-national corporations, investment firms, hedge funds, and private equity firms.

## Education

B.S. –University of North Alabama  
M.B.A. –University of Alabama in Birmingham



**JASON CLEM, CPA, CVA  
ASSURANCE MANAGER /  
VALUATION MANAGER**

## Practice Specializations

Audit, attest, and valuation services for nonprofits, governmental entities, and nonpublic companies.

## Background

Jason has over ten years of experience working in retail management for a Fortune 15 Company, and over seven years in the accounting and valuation industries, where he has provided services for nonprofit, governmental, and nonpublic entities. In addition, he continues to provide tax services for corporations, partnerships, trusts, and high-net-worth individuals. He is currently assisting the National Association of Certified Valuators and Analysts (NACVA) with developing NASBA approved certified professional education.

## Education

B.S. –Athens State University



**DR. JACOB GATLIN, CPA,  
ASSURANCE SENIOR  
MANAGER**

## Practice Specializations

Assurance and consulting services for nonprofits, governmental entities, and nonpublic companies

## Background

Jacob is a Senior Manager for CDPA in their assurance practice section, and has provided accounting, attest, and audit services to nonpublic businesses and organizations for over 15 years. A recognized leader in technical audit and accounting issues, Jacob currently serves as a government-zone telephonic member on the AICPA Private Company Practice Section's Technical Issues Committee ("TIC"), which advocates on behalf of accounting firms and their clients in the standard-setting process with the FASB, GASB, ASB, ARSC, PEEC, and PRB. Jacob previously served on the AICPA Revenue Recognition Task Force, which developed general and industry-specific auditing guidance related to ASC 606—Revenue from Contracts with Customers. Jacob currently serves as the practitioner expert on peer review teams for the premier global accrediting group AACSB in their accreditation processes for university accounting programs around the world. Jacob earned a Doctor of Philosophy in Accounting from Kennesaw State University, a top 6% research institution in the U.S.

## Education

B.S. –University of Alabama in Huntsville  
M.Acc. –University of Alabama in Huntsville  
Ph.D. –Kennesaw State University

**Seminar handouts will be available in downloadable pdf format. The handout link will be emailed to participants three days prior to the day of the seminar. Please print or download the handouts to your device so that you will have access to the materials during the conference.**

# CDPA PC

## CERTIFIED PUBLIC ACCOUNTANTS

Our firm provides outstanding service to our clients because of our dedication to the three underlying principles of professionalism, responsiveness and quality.

### Professionalism

Our firm is one of the leading firms in the area. By combining our expertise, experience and the energy of our staff, each client receives close personal and professional attention. Our high standards, service and specialized staff spell the difference between our outstanding performance, and other firms. We make sure that every client is served by the expertise of our whole firm.

### Responsiveness

Our firm is responsive. Companies who choose our firm rely on competent advice and fast, accurate personnel. We provide total financial services to individuals, large and small businesses and other agencies. Because we get new business from the people who know us best, client referrals have fueled our growth in the recent years. Through hard work, we have earned the respect of the business and financial communities. This respect illustrates our diverse talents, dedication and ability to respond quickly.

### Quality

An accounting firm is known for the quality of its service. Our firm's reputation reflects the high standards we demand of ourselves. Our primary goal as a trusted advisor is to be available and to provide insightful advice to enable our clients to make informed financial decisions. We do not accept anything less from ourselves and this is what we deliver to our clients. We feel it is extremely important to continually professionally educate ourselves to improve our technical expertise, financial knowledge and service to our clients. Our high service quality and "raving fan" clients are the result of our commitment to excellence.

## FAST & EASY REGISTRATION

### HOW TO REGISTER:



**ONLINE**  
[www.una.edu/professionaldevelopment](http://www.una.edu/professionaldevelopment)



**BY PHONE**  
Our registration office is open from 8 a.m. to 4:30 p.m. Monday through Friday. We accept Discover, MasterCard and Visa. We also accept company purchase orders. Call (256) 765-4862 or 1(800)-825-5862, ext. 4862.



**VIA FAX**  
Simply fax the attached registration form any time day or night to (256) 765-4872. All fax orders must contain a credit card number unless we are invoicing your company.



**IN PERSON**  
During our office hours, come by our office at UNA East Campus, 1640 TUNE Ave., Florence.



**MAIL**  
Complete the attached registration form and mail with your check or credit card information (don't mail cash) to UNA Center for Learning & Professional Development, UNA Box 5036, University of North Alabama, Florence, Alabama 35632-0001.

**Cancellations:** If you must cancel, notify us three days in advance for a full refund. Later cancellations may receive credit toward future workshops if requested by the date of the seminar. Participant substitution may be made at any time.

**Course Cancellations:** Non-credit courses are subject to cancellation if there is insufficient enrollment. UNA Center for Learning and Professional Development apologizes for any inconvenience this may cause you. In the event a course is cancelled, a registrant has the option of applying the fees paid to another course or receiving a complete refund.

### Registration Form

If registering more than one person, please list additional names and information on an attached sheet or duplicate this form.

Name \_\_\_\_\_ Job Title \_\_\_\_\_

Company / Organization \_\_\_\_\_

Mailing Address \_\_\_\_\_  Home  Work

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone: (Day) \_\_\_\_\_ (Evening) \_\_\_\_\_

Fax \_\_\_\_\_ Email \_\_\_\_\_

#### 29TH ANNUAL NORTH ALABAMA CDPA PC ACCOUNTING FORUM

(Course #21SUACCT10701)

\$125 per person. (includes download of the text (PDF file) and a certificate of completion.)

\* There is a \$5.00 registration fee per order

#### PAYMENT METHOD

Check Enclosed (payable to UNA) Please include course name on lower left side of check.

Please invoice company above. If different address than mailing, please provide:

Purchase Order

Money Order

Visa

MasterCard

Discover

Name on Card (please print) \_\_\_\_\_

Credit Card # \_\_\_\_\_ Expiration Date \_\_\_\_\_

Credit Card Verification# \_\_\_\_\_

Authorized Signature \_\_\_\_\_

Please make as many copies of this form as you need.