



Virginia Society of  
Certified Public  
Accountants  
Tidewater Chapter

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**TIDEWATER CHAPTER VSCPA  
SPECIALIZED KNOWLEDGE DAY**

DATE: **Wednesday, October 17, 2018**

TIME: 7:30 am to 4:30 pm

PLACE: Chesapeake Conference Center  
700 Conference Center Drive  
Chesapeake, Virginia 23320

PRICE: Tidewater Chapter Members – FREE  
*(Reservations Required)*  
Non-Members - \$125.00

**SPACE IS LIMITED TO AVAILABLE SEATS  
REGISTER EARLY**

*\*Members making a reservation and not attending will be billed \$125.*

Please see enclosed flyer for the schedule of speakers and topics. You can also find updated information at our website – [www.tcvscpa.com](http://www.tcvscpa.com)

Note: All handouts and materials will be available to registered participants prior to the session on our website.

**RESERVATIONS**

Please make your reservations

By Wednesday, October 10, 2018

Members Register online at [Member Login](#) (Recommended)

Non-Members Register online at [www.tcvscpa.com](http://www.tcvscpa.com)

OR if not able to register online E-Mail: [JFrench@pbmares.com](mailto:JFrench@pbmares.com)

**FUTURE EVENTS**

October 17, 2018

Ethics

November 14, 2018

Tax Day

**Participate in the CPA Day of Service  
Support the Foodbank of Southeastern Virginia**



# SPECIALIZED KNOWLEDGE DAY

Wednesday, October 17, 2018

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## *Tidewater Chapter, Virginia Society of Certified Public Accountants*

7:30 – 8:00.....REGISTRATION

8:00 – 8:05.....WELCOME & ANNOUNCEMENTS  
*Nicole Wood-Sabo*  
*President, TCVSCPA*

8:05 – 8:55.....NEXUS AND THE 2018 WAYFAIR DECISION  
*Doug Kahle*  
*Wolcott Rivers Gates*

Coping with the Supreme Court's 2018 E-Commerce Wayfair Decision; the Tax Case of the Millennium

8:55 – 9:45.....10 THINGS CPA'S SHOULD KNOW ABOUT IRA'S IN 2018  
*Gordon Heyworth & Shane Scott*  
*Raymond James*

"It ain't what you don't know that gets you into trouble. It's what you know for sure that just ain't so." --- Twain  
The IRS has no sense of humor when it comes to IRA errors; but there are nuggets of opportunities in the regulations as well.

9:45 – 10:00.....BREAK

10:00 – 10:50 .....BEST PRACTICES – COMPANY RETIREMENT PLANS  
*Mark Barnum – Executive Director of UBS Retirement Plan Consulting*  
*Justin Steil - Financial Advisor - Chartered Retirement Plans Specialist*  
*UBS Financial Services*

Qualified retirement plans, such as 401k plans, face strict and onerous rules under ERISA's high standards of conduct. Plan committees find themselves in a litigious environment with intense regulatory scrutiny as the number of lawsuits filed and settlements made regarding plans has increased in recent years. Join us to learn "Retirement Plan Committee Best Practices" that can help mitigate fiduciary risk and enhance the retirement benefits provided to employees.

10:55 - 11:45 ..... **CYBER SECURITY: A GUIDE TO PROTECTING YOURSELF IN TODAY'S NETWORKED WORLD**

*Randy Plotkin, Information Security Officer  
Port of Virginia*

Learn what Cyber security is and why it is important. How you can protect yourself at work and at home are some of the areas talked about and learn who the attackers are and what they are after. This is just a brief introduction into a wider field and can bring about a longer and more diverse topic of conversation. Learn some of the basics of phishing e-mails and password security to help protect yourself and your clients.

11:45 - 12:45 .....LUNCH

**AFTERNOON SESSIONS**

12:45 - 1:35 ..... **FIVE STEPS TO MAKING BETTER INVESTMENT DECISIONS**

*Paul Ferwerda  
Wilbanks, Smith & Thomas LLC*

An informative, thought provoking, entertaining and broad reaching presentation of how a digitally connected world has adversely impacted investment decision making.

1:40 - 2:30 ..... **VIRGINIA BOARD OF ACCOUNTANCY UPDATES**

*Mary Charity; Acting Executive Director  
Nicholas Tazza; Assistant Manager-Licensing & Examination  
VBOA*

Please join us for an update on the single renewal date, Virginia-Specific Ethics Course sponsor information, continuing professional education and our campus board meetings.

2:30 - 2:45 .....BREAK

2:45 - 3:35 .....**REQUIREMENTS OF EXECUTORS OF ESTATES & TRUSTS**

*Risë Flenner  
PBMares, LLP*

How to assist and advise a client who has been named personal representative of an estate. *Step 1: Don't panic!*

3:40 - 4:30 .....**CRYPTO CURRENCY**

*Alex Crawford, PBMares, LLP  
Shelly Braden, Cornerstone Wealth, Williamsburg*

Please join us as we introduce the world of cryptocurrencies and blockchain technology through a discussion on a basic understanding of how they work, how they are regulated, and how to acquire them.