

2018 Transformative Technologies Workshop
National Harbor – Washington, D.C.
Friday, August 3, 2018

<u>Time</u>	<u>Topic</u>	<u>Presenter</u>
8:00 am	Welcome	Brigitte Muehlmann , <i>Babson College</i> and Don Warren , <i>Marist College</i> Professors, Workshop Co-Chairs
8:05 am	Welcome	Robert Nehmer , Professor, <i>Oakland University</i> , Workshop Co-Chair 2017-2018 President, AAA Strategic and Emerging Technologies Section
8:10 am	Opening Keynote	Rod Brennan , Audit Technologies Director, <i>Libra Technology</i> Introduction: Robert Nehmer, Professor, <i>Oakland University</i>
9:10 am	Xero – Smart accounting in the cloud at scale	Aaron Berson , Cloud Accounting Ecosystem Curator <i>EisnerAmper</i> and Adjunct Instructor, <i>New York University</i> Introduction: Daniel O’Leary, Professor, <i>University of Southern California</i>
10:00 am	Break	
10:30 am	RegTech in the U.S.	Mike Willis , Assistant Director Office of Structured Disclosure, Division of Economics and Risk Analysis, <i>Securities and Exchange Commission</i> Introduction: Amy Pawlicki, VP – Assurance & Advisory Innovation, <i>AICPA</i>
11: 25 am	RegTech in the U.S. & Europe	Lauren Schmitt , CEO, <i>Solveig Galbo</i> , COO, & Farshad Nayeri , CTO <i>Boston RegTech</i> Introduction: Jeff Thomson, President and CEO, <i>IMA</i>
12:20 pm	Lunch	
1:20 pm	RegTech in India	Vinod Kashyap , Co-founder and Director <i>NextGen Knowledge Solutions Private Ltd.</i> Introduction: Brigitte Muehlmann, Professor, <i>Babson College</i>
2:15 pm	Semantic models	Cory Casanave , CEO, <i>Model Driven Solutions</i> Introduction: Don Warren, Professor and Schlobach Distinguished Chair, <i>Marist College</i>
3:05 pm	Break	
3:25 pm	On the horizon: Data and algorithms in sustainability (ESG) reporting	Lloyd Kurtz , Senior Portfolio Manager/Head of Social Impact Investing <i>Wells Fargo Private Bank</i> , and Lecturer, <i>UC Berkeley/Haas</i> Introduction: Robert Herz, Executive in Residence, <i>Columbia University</i>
4:15 pm	Summary	J.P. Krahel , Associate Professor, <i>Loyola University Maryland</i> 2018-2019 Incoming President, AAA SET Section
4:30 pm	Debriefing Reception	Sponsored by <i>Caseware</i> - Software Solutions for Accountants and Auditors



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Miklos Vasarhelyi	KPMG Professor of Accounting Information Systems, <i>Rutgers University</i>

About the Workshop

Designed for everyone interested in how accounting practice is evolving with technological advancements, the annual Transformative Technologies Workshop in Accounting focuses on lively discussions between academicians and industry leaders whose products and services promise to transform the practice of accounting, broadly defined.

This year, we will be exploring a series of technologies including regulation technology (RegTech). Each speaker will introduce at least one “real world” example of a transformative technology application. The discussions will further explore how these transformations will change accounting, how academicians and industry can support each other, and generate new research and teaching activities.

Both academic and practicing accountants are encouraged to attend this workshop. The goal is to support lively discussions between these communities to really explore how innovations will change accounting – and how academics and industry can support each other. Therefore, those interested in how accounting practice is evolving with technological advancements will benefit from these discussions.

CPE: 7.5 hours

Registration

Fee: \$200

free for PhD/DBA students

AAA members – use the Annual Meeting registration form

Non-AAA members – on site

PhD/DBA students – email Deniz Appelbaum by July 15, 2018, appelbaumd@montclair.edu

Location

Gaylord National Hotel, National Harbor (Washington, D.C.)

<https://www.marriott.com/hotels/travel/wasgn-gaylord-national-resort-and-convention-center/>

Gaylord National is a 15-minute drive from Reagan National Airport and a 45-minute drive from both Dulles and Baltimore Washington International Airports. Shuttle and car service are available from either airport to the hotel.