

# SAVE THE DATE!

**113TH ANNUAL CONFERENCE**  
**JUNE 18-19, 2026**

GROUSE MOUNTAIN LODGE - WHITEFISH

**MONTANA**  
SOCIETY *of* CPAs



**Learning and Growing  
in Changing Times**

## 2025

NORTHERN HOTEL - BILLINGS

#AdaptEvolveThrive

# WELCOME

I'm excited to welcome you to this year's conference—our 112th—a remarkable milestone in MTCPA's history. Over the next two days, we'll dive into timely topics, explore fresh ideas, and connect with colleagues from across the state.

Our theme, "**Adapt, Evolve, Thrive: Learning and Growing in Changing Times**," reflects the challenges and opportunities we all face. We've put together a strong lineup of speakers—industry leaders, experts, and fellow CPAs—who will share practical insights to help you succeed in a rapidly changing profession.

This conference is more than a learning opportunity—it's a chance to build relationships, trade ideas, and recharge. Make the most of the sessions, conversations, and networking. You never know where a single connection or idea might take you.

Thank you for being here. Your participation is what makes MTCPA such a strong and vibrant community.

Let's make this a meaningful and memorable event. If you have any questions or need anything along the way, just ask one of our staff—we're here to help.

Enjoy the conference!

## Allen Lloyd

*Executive Director, Montana Society of CPAs*



**ALLEN LLOYD**  
Executive Director

## MTCPA STAFF



**ERINN DONNELL**  
Director of Marketing &  
Communications



**CONNIE JACOBSON**  
Office Administrator /  
CPE Coordinator



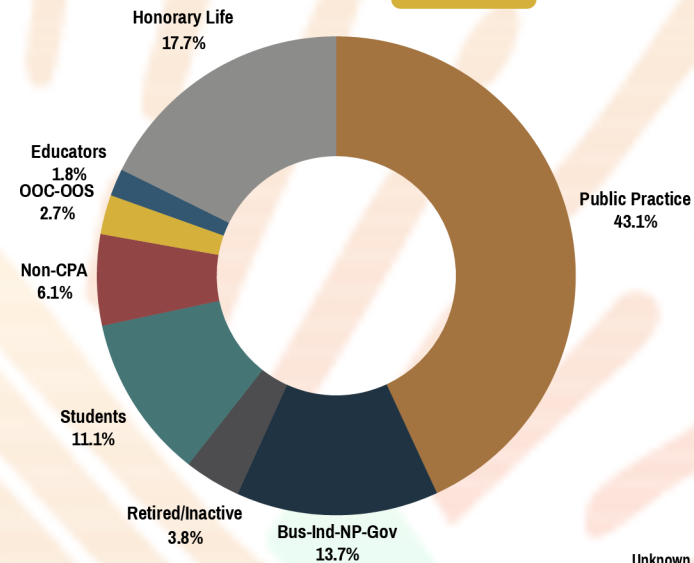
# MONTANA SOCIETY of CPAs

## BY THE NUMBERS

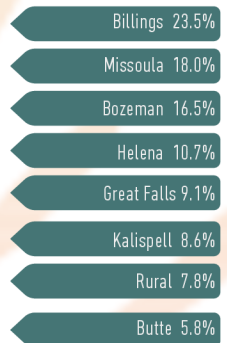
MTCPA has more than 1,500 members worldwide.

(figures as of 4-2025)

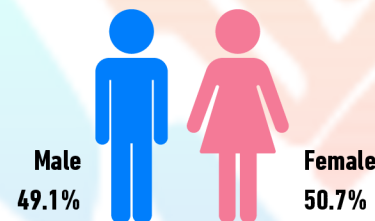
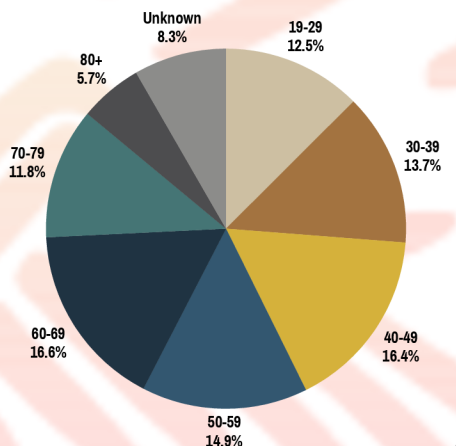
### MEMBER TYPE



### IN MONTANA



### MEMBER AGE



# AGENDA

## WEDNESDAY JUNE 4

7:30 - 9:30PM

Welcome Reception @ Craft Local

## THURSDAY JUNE 5

7:30 - 8:30am

Registration / Breakfast / Coffee

8:30 - 8:45am

Welcome from Board President

8:45 - 10:25am

Lessons from the Summits: What is your Everest? - Dr Jon Kedrowski

10:25 - 10:35am

Break

10:35 - 11:25am

Roadmap to Success - MTCPA BAR Group

11:25am - 12:55pm

MTCPA Awards Luncheon [Inspire-Empower-Impact; Honorary Life; Medallion awards]

1:00 - 2:40pm

Unlocking Better Thinking for CPAs - Dr Toby Groves

2:40 - 2:50pm

Break

2:50 - 3:50pm

Business Meeting / Society Update - w/ MTCPA Board

4:00 - 5:00pm

*STUDENTS & First Year Associates: Business Etiquette 101 - MTCPA BAR Group*

### ON YOUR OWN - FREE TIME

6:00 - 6:30pm

Reception (drinks & appetizers)

6:30 - 8:00pm

Celebration Dinner & Distinguished Service Award [DSA] Ceremony

8:00 - 10:00pm

Dessert Dash & Music Bingo

## FRIDAY JUNE 6

7:30 - 8:20am

Working Breakfast: Creative Design for Workplace Ret. Plans & SECURE 2.0 Essentials

8:20 - 8:30am

Welcome back from new Board President

8:35 - 10:15am

Ethics in The Real World - Dr Toby Groves

10:15 - 10:25am

Break

10:25 - 11:15am

Concurrent Breakout Sessions:

- Goal Setting: Implementing a Plan - Dr Jon Kedrowski
- Aligning Behaviors with Values - Chantel Schieffer
- Accounting for Risk: A Practical Guide to Cybersecurity for CPAs - Geoff Crutcher
- *STUDENTS: Soft Skills, Strong Careers - MTCPA BAR Group*

11:15 - 11:25am

Break

11:25am - 12:15pm

Concurrent Breakout Sessions:

- Goal Setting: Implementing a Plan - Dr Jon Kedrowski
- Cultivating Resilience to Beat Burnout - Chantel Schieffer
- From Buzzwords to Balance Sheets: AI and the Future of Accounting - Geoff Crutcher
- *STUDENTS: Q&A w/ MTCPA & BAR Group*

12:15 - 12:45pm

Break & Grab Lunch

12:50 - 2:30pm

AICPA Update / Fireside Chat - Okorie Ramsey

2:30 - 3:00pm

Closing & Prize Drawings

**WIFI NETWORK:** Northernhotelguest  
**NO PASSWORD REQUIRED**

# HOTEL LAYOUT

(2<sup>nd</sup> floor)



All **GENERAL SESSION** events will happen in the **South Ballroom**

All **MEAL** events will happen in the **North Ballroom**

The **DSA Reception** on Thursday evening will happen in the **Prefunction North** area

**BREAKOUTS** on Friday will either be in the **Hart Albin** or **Babcock** (E & W) rooms

Be sure to visit our **EXHIBITORS** in the **Prefunction West** area

**WAYS TO EARN TICKETS** for grand prize drawings at the end of the conference:

Moderators will be walking around and in sessions giving out the tickets

**RULES:** must be a member; must be present to win; **KEEP** the coupon given to you

- **Interact** or ask questions of the presenter(s)
- **Visit ALL** exhibitor booths and get initials (pages 12-13)\*
- **Win** a round of Music Bingo on Thursday evening
- **Tag** a photo enjoying the conference on social media using **#AdaptEvolveThrive\***
- **Sign up** for a committee (sign-up sheets at registration table)\*

*\*show proof at registration table to receive these tickets*

# SESSIONS

## THURSDAY 6/5

**8:45-10:25am Lessons from the Summits: What is your Everest? South Ballroom**  
Jon will share his approach to conquering your own Everest by staying focused through the storms of life and business, using past successes and lessons in overcoming the mountains of the mind and looking toward the future for new opportunities of growth among the chaos and constant change.

**10:35-11:25am Roadmap to Success South Ballroom**  
The MTCPA BAR Group shares practical strategies to improve the first-year experience for new CPAs—focusing on mentorship, communication, goal setting, and developing key competencies for long-term success in the profession.

**11:25am-12:55pm MTCPA Awards Luncheon North Ballroom**  
Includes Inspire-Empower-Impact Award, Medallion Awards, and Honorary Life presentations.

**1:00-2:40pm Unlocking Better Thinking for CPAs South Ballroom**  
Explore the psychological science behind effective accounting with Dr. Toby Groves in this engaging session. This course introduces innovative thinking, strategies to overcome mental blocks, and tools to enhance judgment, resilience, and stress management for accountants. Delve into emerging topics like AI, fraud detection, and cybersecurity, equipping yourself to excel in today's evolving landscape.

**2:50-3:50pm MTCPA Business Meeting / Society Update South Ballroom**  
Our Board of Directors discusses Society status, updates, and news relevant to all members and non.

**4:00-5:00pm STUDENTS & First Year Associates: Business Etiquette 101 South Ballroom**  
This session, led by MTCPA's BAR Group, introduces accounting students to the essentials of professional etiquette—from dress codes and networking to social media presence and formal dining. Students will gain practical tips to help them make confident, polished impressions in academic and career settings.

### ON YOUR OWN - FREE TIME

**6:00-6:30pm Reception Prefunction North**  
**6:30-7:30pm Celebration Dinner North Ballroom**  
**7:30-8:00pm DSA Award Ceremony North Ballroom**  
Enjoy drinks & appetizer reception, business-casual dinner, and the Distinguished Service Award (DSA) ceremony. *This event is included in attendees' registration price.*

**8:00-8:30pm Dessert Dash North Ballroom**  
Join us for a fun and fast-paced dessert auction benefiting the MTCPA Legacy Foundation. Your sweet tooth helps fund scholarships, student outreach, and programs that support the next generation of CPAs in Montana!

**8:30-10:00pm Music Bingo North Ballroom**  
A fun twist on traditional bingo where, instead of numbers, songs are played and players mark them off on their bingo cards if they recognize the tune. It's part music trivia, part bingo, and all fun!

## FRIDAY 6/6

**7:30-8:20am WORKING BREAKFAST - Sponsored by Allied Investment Advisors North Ballroom**  
**Retirement Reimagined: Creative Design for Workplace Retirement Plans & SECURE 2.0 Essentials**  
Learn how smart retirement plan design can unlock major tax savings and boost benefits for business owners. This interactive session for CPAs will cover strategies like cash balance and cross-tested plans, plus key SECURE 2.0 updates. Walk away with practical insights to enhance your client conversations and planning strategies.

**8:35-10:15am Ethics in The Real World South Ballroom**  
Are common ethics programs truly effective? This session examines why codes of ethics, training, and "tone at the top" often fail and how they can unintentionally undermine ethical reasoning. By exploring psychological and social influences on decision-making, you'll uncover why individuals sometimes act against their own values and learn strategies to promote genuine integrity. Using research, real-world examples, and actionable insights, this session provides a fresh perspective on fostering ethical behavior in complex organizational settings.

### 10:25-11:15am BREAKOUT SESSIONS

**Goal Setting: Implementing a Plan [same session offered at both breakout times] Babcock East**  
Working off of his presentation from yesterday, Dr Jon deep dives into goal setting with a hands-on approach.  
**Aligning Behaviors with Values Babcock West**  
Great leaders live their values. In this breakout, Chantel Schieffer helps you identify what drives you and ensure your actions reflect your beliefs—even in tough times.

**Accounting for Risk: A Practical Guide to Cybersecurity for CPAs Hart Albin**  
Cybersecurity is a growing business risk—and CPAs are on the front lines. This session covers key threats like phishing, ransomware, and vendor risks, with practical strategies to protect your firm, clients, and commonly used tools like email and cloud platforms. Whether you're solo or part of a large team, you'll gain actionable steps to strengthen your defenses.

**STUDENTS: Soft Skills, Strong Careers Enterprise Boardroom**  
Learn how to prioritize, manage time, and think strategically through real-world scenarios and interactive exercises. A hands-on session designed to sharpen the soft skills that drive professional success.

### 11:25am-12:15pm BREAKOUT SESSIONS

**Goal Setting: Implementing a Plan [same session offered at both breakout times] Babcock East**  
Working off of his presentation from yesterday, Dr Jon deep dives into goal setting with a hands-on approach.  
**Cultivating Resilience to Beat Burnout Babcock West**  
Learn what burnout is, why its dangerous, your personal stress triggers and warning signs, and ways to protect yourself against extreme stress and overwhelm.

**From Buzzwords to Balance Sheets: AI and the Future of Accounting Hart Albin**  
Get a practical, jargon-free introduction to large language models (LLMs) and AI—built specifically for accountants. We'll cover what LLMs are, how they work, and how they're already being used in finance, compliance, and client communication. Whether you're new to AI or looking to apply it in your daily work, this session will make the technology approachable and relevant.

**STUDENTS: Q&A w/ MTCPA Enterprise Boardroom**  
Have questions about the CPA exam, career paths, or what to expect as you enter the profession? This informal Q&A session is your chance to ask! Join MTCPA's Executive Director, special guests, and the BAR Group for open conversation and real-world insights.

### 12:15-12:45pm Break & Grab Boxed Lunch

Take a short break, then pick up your boxed lunch in the South Ballroom—where the next session will begin shortly. We'll be diving into a great session, so come ready to engage!

South Ballroom

### 12:50-2:30pm AICPA Update / Fireside Chat

Join past AICPA Chair Okorie Ramsey for an insightful discussion on the latest developments impacting the accounting profession. This interactive session will cover key AICPA initiatives, industry trends, and challenges shaping the future of CPAs. MTCPA Executive Director Allen Lloyd will join Okorie for some local discussion as well.

South Ballroom

### 2:30-3:00pm Closing & Prize Drawings

Be sure to stick around as we say our final goodbyes and draw ticket numbers for great prizes!

South Ballroom

## BREAKOUTS

### Retirement Reimagined: Creative Design for Workplace Retirement Plans & SECURE 2.0 Essentials



**SARAH SIDERIUS** AIF®, CFP®

Director of Retirement Plan Services,  
Allied Investment Advisors



**STEVEN A. BLOM** CPC, QPA, QKA, ERPA

Director of Retirement Plan Services,  
Owner, Big Sky Retirement

Allied is an independent investment advisory firm serving Montana & Wyoming, founded in 2009 in the middle of the financial crisis. We help businesses, pre-retirees, retirees, endowments, and foundations with their investment needs, financial planning, and 401k plan advisory services. Our business has been built one relationship at a time, helping our clients stay the course. We pride ourselves on the same western values that define the region we call home, and believe our clients need two things from us: someone they can trust and the opportunity to meet us face to face. As an investment fiduciary passionate about serving, you have our word that all decisions are made locally with your best interest in mind.

### Aligning Behaviors with Values

### Cultivating Resilience to Beat Burnout



**CHANTEL SCHIEFFER**

Owner  
True North Leadership

### A Practical Guide to Cybersecurity for CPAs

### AI and the Future of Accounting

**GEOFF CRUTCHER**

Client Success Manager,  
Entre Technology Services



### Roadmap to Success

Brigitte Baake, CPA  
Jessica Curney, CPA  
Katherine Durbin, CPA  
Miranda Koski, CPA  
Koltan LaMiaux, CPA

Tymber MacKenzie, CPA  
Caitlin Mayer, CPA  
Hailee Regan, CPA  
Raeanna Richards, CPA  
Olivia Smith

**BAR  
GROUP**

## KEYNOTES



**DR JON KEDROWSKI**

Dr. Jon Kedrowski is an accomplished mountaineer, geographer, and author with a Ph.D. in Environmental Geography. Based in Vail, Colorado, he has summited 6 of the 7 continental peaks, including 7 Everest expeditions, and made historic climbs such as a winter ascent of K2 in 2021. Jon's books, such as "Sleeping on the Summits," combine his love of adventure with storytelling. As a guide, speaker, and coach, he inspires others by using mountains as metaphors for personal and professional growth.



**DR TOBY GROVES**

Dr. Toby Groves explores innovative strategies to enhance thinking and decision-making by leveraging the brain's adaptability. Inspired by neurological recovery therapies, extreme resilience through adversity, and breakthroughs in autism, stroke, and brain injury recovery, his work adapts these techniques for industries, government, and daily life. Over the past decade, Dr. Groves has collaborated with thousands of decision-makers across critical fields, refining methods that improve mental agility, elevate decision-making, and uncover hidden potential in real-world applications.



**OKORIE RAMSEY**

CPA, CGMA, PMP, NACD.DC

### Chair, AICPA and the Association 2023-2024

Okorie L. Ramsey, CPA, CGMA, PMP, is Vice President of Sarbanes/Oxley Compliance at Kaiser Permanente and Chair of the AICPA and the Association of International Certified Professional Accountants. With extensive leadership experience in governance and finance, Ramsey oversees regulatory compliance, internal controls, and risk management. He is a lifetime NABA member, past CalCPA leader, and former adjunct professor at San Francisco State University. Holding a BS in Business Administration and Harvard Executive Leadership credentials, Ramsey is dedicated to mentoring, family, and advancing the accounting profession.

# GEORGE D. ANDERSON DISTINGUISHED SERVICE AWARD

*The Distinguished Service Award (DSA) is MTCPA's highest honor, recognizing a CPA who has demonstrated outstanding dedication to the profession and public service over the course of their career. Recipients have made a lasting impact—whether through leadership, advocacy, mentorship, or contributions at the local, national, or international level—elevating both the profession and the communities they serve.*



**Ronald Yates, Jr** CPA

**Tax Partner & Regional Leader**  
**Eide Bailly, Billings**

Ron Yates is a Tax Partner and Regional Leader at Eide Bailly LLP in Billings, Montana. With nearly 30 years of experience in public accounting, he specializes in tax planning and consulting for businesses, high-net-worth individuals, and complex sectors including oil & gas and estate planning.

A past President of the Montana Society of CPAs, Ron has held leadership roles with the AICPA, including serving on its national board of directors. He is deeply involved in the Billings community and has served on numerous local and national boards, including the Billings Chamber of Commerce and Alberta Bair Theater.

Ron is a proud University of Montana graduate and enjoys running, ranching, and cheering on the Griz with his wife and daughter.



*To see previous DSA Awardees: scan with your phone to visit our website*

# INSPIRE-EMPOWER- IMPACT AWARD

*This award is a celebration of the impact CPAs make through their actions to which empower other CPAs, educational innovation and contributions to the accounting profession that motivates and inspires students, and/or their volunteer efforts both within the Society and the community.*

**Madeline Miller** CPA

**Founder & CEO**

**FNCH Financial & Consulting, Bozeman**



Maddie Miller is an experienced professional in operations, public accounting, and financial strategy. She has served as an outsourced CFO, controller, and tax advisor, offering trusted guidance on tax and compliance to a wide range of clients.

A dedicated community advocate, Maddie volunteers with the Prospera Women's Business Center and serves as the current Advisor to MTCPA's BAR Group for young professionals. She is a past recipient of Bozeman's 20 Under 40 and an alumna of the AICPA Leadership Academy, reflecting her strong commitment to leadership and the future of the profession.

## HONORARY LIFE RECIPIENTS

*This award and status is granted by the Board of Directors for committed members in good standing for 20 years or more, and who reaches age 70.*

Albert W. Anderson Jr, CPA ■ Richard M. Baskett, CPA, JD ■ Linda R. Beddow, CPA  
William G. Burgdorfer, CPA ■ Gordon C. Campbell, CPA ■ James H. Cordle, CPA  
Corwin Coughlin, CPA ■ Julie Curd, CPA ■ Donald N. Davies, CPA ■ Londell L. Faight, CGMA  
Sherill L. Frickle, CGMA ■ Herb A. Fullerton ■ Dennis L. Klusdahl, CPA ■ M Sheila Knutson  
T Wayne Koepke, CPA ■ Margaret A. Lehman\* ■ William H. Lewis, CPA ■ Terry J. Sheppard, CPA  
Gary V. Staudinger, CPA, CGMA\* ■ Jerry M. Waller, CPA ■ Mary L. Walsh ■ David R. Whittle  
Karen V. Woods, CPA

## MEDALLION AWARDS

*The Medallion is awarded to an outstanding upper-level accounting student who represents excellence in scholastic achievement in the accounting curriculum.*

Savannah Rydalch\* (Carroll College) ■ Lily Alexander (MSU) ■ Renzie Pond\* (MSU-B)  
Dani Bartsch\* (U of M) ■ Max Anderson (Tech)

*\*in attendance*

# BOARD OF DIRECTORS



## PRESIDENT



**SARA SMITH**  
ALPS Corporation  
Missoula

## PRESIDENT-ELECT



**TIM KOBER**  
Montana Tech  
Butte

## TREASURER



**RUSS DAVIS**  
Boyle Deveny & Meyer  
Missoula

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**RUSSELL RICE**  
Eide Bailly  
Billings



**BRIGITTE BAAHE**  
Jordaht & Sliter  
Kalispell



**MELANIE BENGTSON**  
Boyle Deveny & Meyer  
Missoula



**MEGAN CONNORS**  
Pinion  
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**CARRIE FAULHABER**  
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**CONNOR LARSON**  
Colleen Black & Co.  
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**TYMBER MACKENZIE**  
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**HILARY RENS**  
Deason CPA PC  
Miles City



**BECKY TURNER**  
RDT Accounting  
Livingston

## DEPARTING BOARD MEMBERS

### PAST PRESIDENT



**TRACEE GALLO**  
Multistate Tax Resources  
Helena



**CHET MCLEAN**  
Chet McLean CPA PC  
Helena



**ERIC ROBERTS**  
Eide Bailly  
Billings



**ANN DEEGAN**  
Summers McLea  
Billings

The Board of Directors leads the Society, driven by our Strategic Plan. They engage in discussions on industry challenges and ensure the Society moves forward with impact. Board members serve three-year terms, attending quarterly meetings to advise and direct staff.

**Interested in joining the Board? Want nominate someone?**

Talk to a staff member today or go to [www.montana.cpa/board](http://www.montana.cpa/board)

# EXHIBITORS

*Visit all and get initials by each to win extra tickets*



initials \_\_\_\_

We provide tax savings services for CPAs and their clients, enhancing cash flow and ensuring compliance. Since 2003, we've completed over 40,000 cost segregation reports nationwide. Our accurate calculations come with free audit defense and have never lost to the IRS. Services include cost segregation, energy tax credits, R&D tax credits, repair regulation compliance, building systems valuations, and Green Zip tape for new construction.



initials \_\_\_\_

Workstream is the leading HR, Payroll, and Hiring platform for the hourly workforce. Its smart technology streamlines HR tasks so accountants and their customers can move fast, reduce labor costs, and simplify operations—all in one place. Over 5,000 hourly businesses rely on Workstream to hire, retain, and pay their teams.



initials \_\_\_\_

Since 1988, the Montana Community Foundation has worked tirelessly to create permanent philanthropy and build stronger communities. Our work with donors, charitable organizations, cities and towns plays a critical role in both philanthropic and community development. Our mission is to cultivate a culture of giving so Montana communities can flourish.



initials \_\_\_\_

The Montana Department of Revenue administers over 40 state taxes and fees, including income, natural resource, and corporation taxes. It determines values for all taxable property, manages liquor store franchise agreements, oversees wholesale liquor operations, and enforces alcohol-related laws. Additionally, the department returns unclaimed property to rightful owners. Our mission is to be the nation's most citizen-oriented, efficiently administered, state tax agency.



initials \_\_\_\_\_

The University of Montana College of Business offers a supportive, engaging environment where students gain real-world experience through internships, study abroad, and hands-on learning. Faculty and staff provide the tools, mentoring, and industry connections students need to achieve their goals.

UM's accounting program builds strong analytical and problem-solving skills, preparing students for careers in business, nonprofit, or government sectors, as well as advanced study and professional certifications, including the Master's of Accountancy (MAcct) program. It holds separate AACSB accreditation in accounting—an elite distinction held by only 173 institutions worldwide and unmatched in the state.

## SPONSORS

### PLATINUM



### GOLD



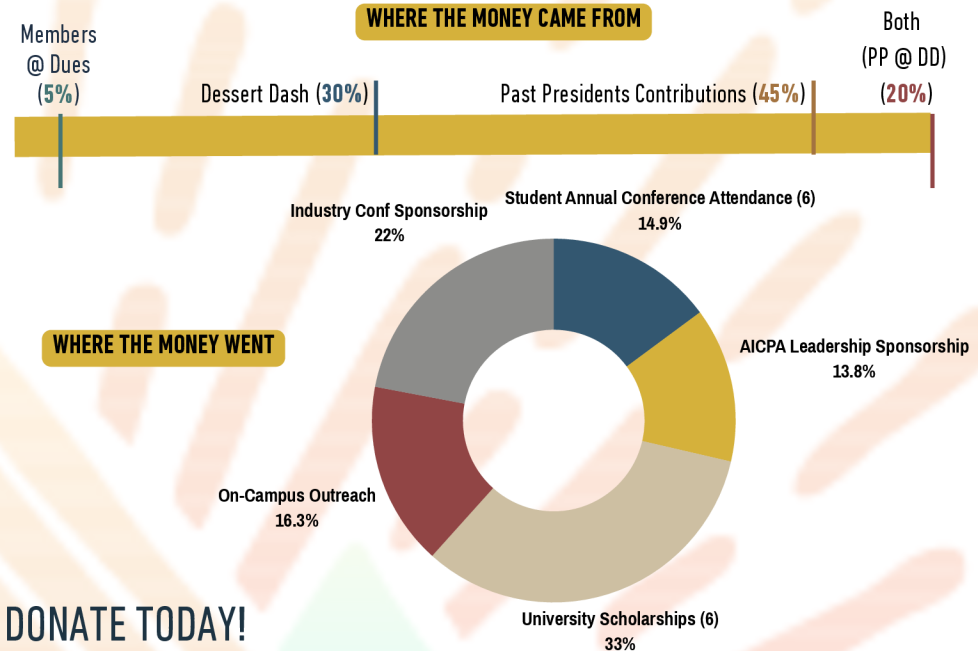
### MEALS, RECEPTION & BREAKS



## LEGACY FOUNDATION

2024-2025

The Legacy Foundation is committed to securing the future success of the accounting profession. Your support helps us invest in aspiring CPAs, connect students with Montana firms and companies, and provide scholarships to nurture and support future leaders in the field.



## DONATE TODAY!

### Ways to Donate:

- General Contribution:** Your donation will support the general foundation fund, helping us continue our mission.
- Montana Endowment Credit:** By making an endowment gift by December 31st, you can benefit from a 40% Montana Tax Credit on your individual tax return, along with a net federal tax itemized deduction.
- Attend the Dessert Dash** Thursday evening: Place your bid and have the opportunity to get the best dessert for your table - all while supporting a good cause!

Find out more on our website!  
Scan the QR code on your phone, or talk to a staff member or Legacy Foundation representative

