

ALASKA SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS

71st ANNUAL MEETING



MAY 28TH – MAY 30TH * SEWARD * WINDSONG LODGE

May 28th Optional CPE Session

Crucial Conversations / 4 Hours

May 28th CPE Session

Ethical Considerations for CPAs / 4 Hours

May 29th CPE Sessions

Harness the Power of Coaching / 4 Hours

Grassroots Advocacy & Importance of the PAC / 1 Hour

Professional Issues Update / 1 Hour

Divorce Happens / 1 Hour

May 30th Annual Meeting



Diehl CPA

AKCPA
ALASKA SOCIETY OF CPAs

CAMICO[®]



Dear Members of the Alaska Society of CPAs:

The AKCPA 2025 Annual Meeting will be held May 28th – May 30th in Seward, Alaska at Windsong Lodge.

Jonathan King, M.S., PCC, ACTC from Halcyon Consulting, Inc. will present an optional 4-Hour class in the morning on Wednesday, May 28th, Crucial Conversations. Registration fees for this class are separate from the Annual Meeting registration fee.

Annual Meeting festivities begin at 12:00 p.m. on May 28th with lunch and fun followed by Ethical Considerations for CPAs presented by Amy Cooper, DBA, CPA, CGMA and myself (4 CPE credits). You will not want to miss the Opening Reception festivities at Stoney Creek Brewhouse generously sponsored by CAMICO!

Thursday begins with breakfast followed by the sessions: Harness the Power of Coaching (4 CPE credits) led by Jonathan King. We will break for lunch and wrap up Thursday afternoon with Grassroots Advocacy & Importance of the PAC (1 CPE Credit) led by James Cox / AICPA Director, State Legislative & Regulatory Affairs and Kelly Ward, CPA, CTC, CGMA, MBA, Professional Issues Update (1 CPE credit) led by Carl Peterson, CPA, CGMA / AICPA Vice President of Small Firm Interests, followed by Divorce Happens (1 CPE credit) with Sarah Peterson, J.D., CPA / Boulay Group (1 CPE credit). We will end Thursday with dinner and fun at Tidewater Taphouse generously sponsored by Diehl CPA LLC!

The meeting will conclude on Friday morning with breakfast and the Annual Business Meeting. All members, including Associate and Student members, are welcome and encouraged to attend. There is no fee for attending the Business Meeting portion of the Annual Meeting.

There will be plenty of time to meet and mingle throughout the event. As always, we have some fun surprises planned and look forward to seeing you at all of these events.

I hope you will join us this otterly engaging annual meeting!

Sincerely,

Margaret Hernandez

Margaret A. Hernandez, CPA, MBA
President

2600 Cordova Street, Suite 211
Anchorage, Alaska 99503
P 907 562-4334 • F 907 562-4025
akcpa@ak.net • www.akcpa.org

Schedule of Events

Wednesday, May 28th, 2025

8:30 am to 12:00 pm

Crucial Conversations (4-Hours CPE)

Jonathan King, M.S., PCC, ACTC / Halcyon Consulting, Inc.

Optional 4-Hours CPE (Separate Registration Fee)

12:00 pm

Buffet Lunch Served

Sponsor Introductions & Networking Fun

1:00 pm to 4:30 pm

Ethical Considerations for CPAs (4-Hours CPE)

Amy K. Cooper, DBA, CPA, CGMA / Margaret A. Hernandez, CPA, MBA

5:30 pm to 7:00 pm

Opening Reception / Stoney Creek Brewhouse

Featuring Stoney Creek Libations, Tour & Fun! Dress For Outside!

Generously Sponsored by CAMICO

Dinner on Your Own

Thursday, May 29th, 2025

7:30 am to 8:30 am

Buffet Breakfast Served

8:30 am to 12:00 pm

Harness the Power of Coaching (4-Hours CPE)

Jonathan King, M.S., PCC, ACTC / Halcyon Consulting, Inc.

12:00 pm

Lunch

1:00 pm to 2:00 pm

Grassroots Advocacy & Importance of the PAC (1-Hour CPE)

James Cox, AICPA Director, State Legislative & Regulatory Affairs / Kelly Ward, CPA, CTC, CGMA, MBA

2:00 pm to 3:00 pm

Professional Issues Update (1-Hour CPE)

Carl Peterson, CPA, CGMA, AICPA Vice President of Small Firm Interests

3:00 pm to 4:00 pm

Divorce Happens (1-Hour CPE)

Sarah Peterson, J.D., CPA, Boulay Group

6:00 pm

Dinner at Tidewater Taphouse

Generously Sponsored by Diehl CPA LLC

Friday, May 30th, 2025

7:30 am – 8:30 am – Breakfast Buffet Served

8:30 am – Annual Business Meeting

11:00 am – Adjourn

AKCPA 2025 Annual Meeting Registration

Windsong Lodge / Seward, Alaska
May 28th – May 30th, 2025



SAVE THE DATES & MAKE YOUR HOTEL RESERVATIONS NOW!

Windsong Lodge - Seward

AKCPA Annual Meeting Room Rates

Standard \$271 plus tax/fees / Standard Deck \$287 plus tax/fees

Room Discount Available Nights of May 27th – May 30th

BOOK YOUR RESERVATIONS NOW:

**Contact the Seward Windsong Lodge Group Reservations Department
and reference the following information**

- **Property: Seward Windsong Lodge**
- **Name of Event & Group Booking Code: Alaska Society of CPAs Annual Meeting & 3245154**
Group Reservations: 1-877-777-4081 or AWC@pursuitcollection.com

Registration Fees

Season Pass / Season Tickets Not Valid for This Event

<input type="checkbox"/>	AKCPA Members Only *Includes 11-Hours CPE, Meals & All Annual Meeting Events*	*****	\$595
<input type="checkbox"/>	May 28th Optional 4-Hours CPE Crucial Conversations	*****	\$180 / Member \$250 / Non-Member
<input type="checkbox"/>	Guest *Includes Meals, Opening Reception & Dinner*	*****	\$250
<input type="checkbox"/>	Non-Member Full Registration *Includes 11-Hours CPE, Meals & All Annual Meeting Events*	*****	\$775
<input type="checkbox"/>	Thursday Dinner Only (Space Is Limited – Priority Given to Full Annual Meeting Attendees)	*****	\$125

[CLICK HERE TO REGISTER ONLINE](#)

Annual Meeting / 11-Hours CPE (AM-CPE)

Season Tickets / Season Passes Not Valid For Annual Meeting

Ethical Considerations for CPAs (4-hours CPE)

Harness the Power of Coaching (4-hours CPE)

Grassroots Advocacy & Importance of the PAC (1-hour CPE)

Professional Issues Update (1-hour CPE)

Divorce Happens (1-hour CPE)

Windsong Lodge

31772 Herman Leirer Road

Seward, AK 99664

Registration Fee / Includes 11-Hours CPE, Meals & All Annual Meeting Events:

\$595 / Member

Non-Member Fee / Includes 11-Hours CPE, Meals & All Annual Meeting Events:

\$775

Ethical Considerations for CPAs (4-Hours CPE)

May 28th, 2025 / Afternoon Session

CPAs today face greater challenges than ever to maintain the high ethical standards of their profession. This course provides a framework within which to consider the ethical challenges facing CPAs and focuses on ethical requirements that CPAs must adhere to in their everyday practice, including practical examples of potential ethical dilemmas that practitioners may encounter.

Major Topics

- The CPA's role in today's economy
- The similarities and differences between individual and business ethics
- The link between ethics, integrity and scruples
- The basic attributes of ethics and professional conduct
- The history of the CPA profession and the CPA's requirement to adhere to ethics policies and codes of conduct
- The AICPA's Code of Professional Conduct and a CPA's responsibility to the public, clients, and colleagues
- The common rules and statutes faced daily in the CPA profession. Case studies may also be utilized to present potential ethical dilemmas CPAs may face during their careers

Learning Objectives

- Understand the attributes of ethics and professional conduct
- Identify ethical issues that occur every day in the work environment
- Understand those deliberative, emotional, and social skills that enable a CPA to put their knowledge of the rules into practice in ways that are applicable to any situation

CPE Credits: 4, Ethics

Discussion Leaders: Amy K. Cooper, DBA, CPA, CGMA & Margaret A. Hernandez, CPA, MBA

Harness the Power of Coaching (4-Hours CPE)

May 29th, 2025 / Morning Session

Highly engaged teams have lower turnover and higher productivity than disengaged teams. At the same time, no leadership skill is more powerful in creating engaged followers and teammates than coaching and no leadership skill is used less by today's leaders. Harness and refine your ability to create engaged followers by learning the essentials of coaching. You do not have to be great; you just have to try! Engagement attendees will:

- Discover how coaching creates engaged followers and engaged followers drive success;
- Learn the essentials of basic coaching including how to separate coaching from mentoring and how to use coaching in one-on-one conversations;

- Practice effective coaching skills with other attendees so that the first time you use coaching skills won't be when you really need them to work.

CPE Credits: 4, Professional Development

Discussion Leader: Jonathan King, M.S., PCC, ACTC / Halcyon Consulting, Inc.

Grassroots Advocacy & Importance of the PAC (1-Hour CPE)

May 29th, 2025 / 1st Afternoon Session

Advocacy informs the public policy debate and effects legislative and regulatory changes. Through advocacy engagement, CPAs can educate policymakers about issues unique to the profession. These issues include CPA licensing issues and the taxation of services provided by CPAs and CPA firms. Attendees will gain an understanding of key issues impacting the profession and the importance of the PAC.

CPE Credits: 1, Professional Development

Discussion Leader: James Cox, AICPA Director, State Legislative & Regulatory Affairs & Kelly Ward, CPA, CTC, CGMA, MBA

Professional Issues Update (1-Hour CPE)

May 29th, 2025 / 2nd Afternoon Session

This session will cover a wide range of topical areas. With a focus on firm insights and data gathering done by AICPA data analysts, hear what firms across the country are doing to address their talent and staffing challenges. Get a clearer understanding of the top issues impacting the profession today.

CPE Credits: 1, Professional Development

Discussion Leader: Carl Peterson, CPA, CGMA / AICPA Vice President of Small Firm Interests

Divorce Happens (1-Hour CPE)

May 29th, 2025 / 3rd Afternoon Session

This presentation provides a broad understanding of divorce financial services and the critical role CPAs play in supporting attorneys and clients during marital dissolution. Financial settlements are complex, and CPAs are often expected to provide clear financial analysis, identify irregularities, and offer guidance on asset division and projected cash flow. This session will highlight key financial considerations in divorce, including marital asset valuation, support calculations, and forensic accounting. Participants of this session will:

- Enhance their understanding of the financial complexities involved in divorce cases
- Understand CPAs' role in asset valuation, income analysis, and forensic accounting
- Learn about common financial misrepresentations and strategies to uncover inaccuracies
- Learn steps CPAs should take to provide better financial guidance in divorce cases

CPE Credits: 1, Specialized Knowledge

Discussion Leader: Sarah Peterson, J.D., CPA / Boulay Group