

HEADWATERS LEADERSHIP CONFERENCE

YOUR FIRM
WON'T CONTINUE
TO THRIVE BY
EMBRACING STATUS QUO.

JULY 17-18,
2025

Let's take a fresh look at your firm's role
and how to move in new directions
to improve offerings, options and future success.

Join us for HeadWaters 2025 as experts provide
practical examples, best practices and the upsides
(and downsides) of the new trends in accounting.

It's time to reimagine what accounting – and
your firm – could become.

ACCOUNTING
REIMAGINED



The Conference

Change is inevitable. But will your firm merely react to industry shifts, or will it proactively redefine its future? As traditional accounting models are challenged, firms must choose whether to cling to outdated ideas or embrace new ways to expand, improve and evolve.

HeadWaters Leadership Conference 2025 will equip your firm with the information and strategies to move beyond compliance and build a future-ready practice.

Here's a sampling of topics:

- Creating extraordinary client relations
- Exploring firm structures and funding
- Learning from our profession's past
- Strategically quitting losing games
- Leveraging technology for revenue
- Strategically managing workload
- Creating spin-off companies
- Effectively utilizing interns
- Addressing mental health
- Eliminating timesheets
- Going beyond CPAs
- Engaging alumni

CONFERENCE FACILITATORS/SPEAKERS



Heath Alloway
Faculty Member at
Upstream Academy



Jason Blumer
Chief Innovation Officer at
Blumer & Associates, CPAs, PC



Marly Brown
President and CEO of
PYA



Jana Cinnamon
Partner & Chief Operating
Officer at Abdo, LLP



Jonathan Clark
Tax Partner at
RKL LLP



Jeremy Clopton
Managing Director at
Upstream Academy



Courtney DeRonde
CEO at Forge Financial
& Management
Consulting



Sarah Krom
Managing Partner at
SKC & Co. CPAs, LLC



Roo Righter Mulligan
Senior Manager,
Talent Advisor at
Clark Nuber PS



Angela Oakley
Director, Talent
Advisor at
Clark Nuber PS



John Sensiba
Managing Partner at
Sensiba LLP



Kyle Turriff
Director of
Technology Consulting
at RLB LLP



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CONFERENCE AGENDA

THURSDAY, JULY 17TH, 2025

7:00 - 8:00am Breakfast

8:00 - 8:15am Welcome

8:15 - 9:15am **Reimagining Your Future Requires Learning from the Past**

John Sensiba, Managing Partner at Sensiba LLP

Before reimagining a future, you first need to understand history. How did our profession's current policies, beliefs, and status quo develop? And how many of the things we claim our profession can't live without are things we've thrived without? Join John for a thought-provoking look at our profession's future through the lens of our profession's beginnings.

9:15 - 9:30am Break

9:30 - 10:30am **Creating a Culture of Care to Enhance Mental Health and Employee Engagement**

*Angela Oakley, Director, Talent Advisor at Clark Nuber PS
Roo Righter Mulligan, Senior Manager, Talent Advisor at Clark Nuber PS*

Firm leaders face unique challenges in managing team mental health and engagement. By building a culture of care, you can enhance productivity and ensure that your teams feel valued, supported, and inspired to achieve their best. Roo and Angela will share actionable insights and strategies to foster mental well-being, engagement, and motivation. Create engaged teams and motivated employees by implementing effective mental health initiatives and building a culture of care.

10:30 - 10:45am Break

10:45 - 12:00pm **Stop Hiring So Many CPAs – A Panel Discussion**

CPAs serve a vital role in accounting firms. But over-reliance on CPAs can limit creativity, scalability, capacity, and problem-solving. Our panel discussion will explore innovative alternatives, including outsourcing, offshoring, leveraging consultants, and more strategic use of administrative professionals. Learn from our expert panel how diversifying talent in your firm could expand capacity, boost profitability, reduce costs, and position your firm for future growth.

12:00 - 1:00pm Lunch

1:00 - 1:45pm Concurrent Sessions #1 (Choose One of Three)

Why Team Capacity Shouldn't be Managed by the Team

Jason Blumer, CEO of Blumer CPAs and CEO of the Thriveal Network

Allowing teams to self-manage capacity often results in inefficiencies, missed deadlines, unbalanced workloads, and burnout. Join Jason for a frank discussion about the need for strategic workload management, and the psychology and perception of a professional's capacity. He'll explore tools and strategies for optimizing resource allocation, setting realistic workloads, and empowering leadership to make informed capacity decisions that boost productivity and morale – optimizing team performance while maintaining employee well-being.

Spin It to Win It: Spinning Off Services into Standalone Companies

Sarah Krom, Managing Partner at SKC & Co. CPAs, LLC

Firms often attempt to shoehorn new non-accounting service lines into the firm structure – with limited success. What if there was a better way? Sarah's firm created a new technology company rather than adding an analytics service line. Learn the benefits of thinking outside the box (and the firm) to allow professionals the freedom to thrive rather than being wedged into a model which is not designed for their service.

Turning Technology from an Expense to Revenue

Kyle Turriff, Senior Technology Consultant at RLB LLP

Firms generally see technology as a cost center, not a revenue driver. Join us as Kyle explores practical ways to monetize tech investments – automation, data analytics, digital services, and tech-driven service offerings – improving the client experience through digital solutions and turning IT investments into competitive advantages. Learn from a real-world firm how innovative tools and automation can generate revenue.

1:45 - 2:00pm Break



CONFERENCE AGENDA

THURSDAY, JULY 17TH, 2025 (CONTINUED)

2:00 - 2:45pm Concurrent Sessions #2 (Choose One of Three)

Investing in the Future: The Value of Interns in Your Firm

Marty Brown, President and CEO of PYA

Firms often underutilize interns, missing opportunities for fresh ideas, mutual growth, and a strong relationship that builds lasting firm loyalty. Let's discuss how to create impactful intern programs that cultivate talent and drive firm growth. Marty will discuss onboarding strategies, mentorship, meaningful project assignments, and pathways for turning interns into future leaders – ensuring long-term value for your firm.

Boomerangs and Goodbyes – Leveraging Your Alumni Network

Heath Alloway, Faculty Member at Upstream Academy

When a firm member leaves for a new opportunity, the grass is often less green than anticipated. Lost connections with former employees can mean missed opportunities for employee returns – and the loss of a potential firm advocate and referral source. Let's explore strategies to stay connected with past talent, create rehire opportunities, and foster firm advocates to extend your firm's reach and influence.

Breaking Free from Time Sheets: Rethinking Productivity

Courtney DeRonde, CEO at Forge Financial & Management Consulting

Courtney's firm eliminated timesheets and never looked back. Could your firm make the jump? She'll offer alternatives to traditional billing methods, focusing on value-based pricing and project management tools, and explore the advantages and drawbacks of a firm without timesheets. Decide for yourself whether eliminating timesheets will result in lost productivity or could improve morale and foster a more flexible, efficient, and liberated work environment.

2:45 - 3:00pm Break

3:00 - 5:00pm **Discussion Forums: Shared Challenges, Shared Solutions**

Always one of the most popular features of Upstream conferences, our afternoon discussion forums provide an unmatched opportunity to share your firm's greatest challenges and learn how other firm leaders have successfully dealt with the same difficulties.

5:15 - 6:15pm Reception

FRIDAY, JULY 18TH, 2025

7:00 - 8:00am Breakfast

8:00 - 8:10am Welcome

8:10 - 9:25am **Alternatives to Fiercely Independent – A Panel Discussion**

Many firm leaders express a desire to become a legacy firm – right up until they suddenly take another path. What happens to change their minds? And is remaining independent a viable option for your firm? Our panel will explore strategic alternatives (private equity, M&A, alliance models, etc.) and these options' risks and rewards, helping you determine the best path to stay competitive in our rapidly changing industry.

9:25 - 9:40am Break

9:40 - 10:40am **Can Accountants Be Hospitable?**

Jana Cinnamon, Partner & Chief Operating Officer at Abdo, LLP

Accountants are known for solving problems, getting things done on time, and reporting accurately. Could they also be renowned for being hospitable and creating extraordinary experiences? Join Jana for tips and best practices on creating meaningful experiences, connections, and wow moments with your clients that go beyond client service. This session will challenge you to level up your efforts for your best clients.

10:40 - 10:55am Break

10:55 - 12:15pm **Stop Persisting and Start Quitting**

Jeremy Clopton, Managing Director at Upstream Academy

When do persistence, resolve, and a never-say-never attitude become a liability? Clinging to outdated processes and failing strategies drains resources, stifles innovation, and saps morale. So, how can you identify when it's time to pivot, abandon ineffective initiatives, or embrace new directions? Jeremy will discuss how strategic quitting can free up resources, unlock innovation, and send your firm in new, more strategic directions.

12:15 - 12:30pm Closing

Cost and Registration

Registration is \$1,350 per person (\$1,150 for UAN members).

Go to www.upstreamacademy.com/headwaters/ to register or call 406-495-1850.

Cancellation Policy

Registrants will be refunded registration fees less a \$100 cancellation charge, if they notify Upstream before June 13, 2025. After this date, only \$200 will be refunded.

Transportation

The hotel is located approx. 35 minutes by car from the Denver International Airport.

Meal Requests

If you have special meal requests, please contact us at info@upstreamacademy.com.



DENVER

Nestled at the base of the Rocky Mountains, Denver blends natural beauty with urban sophistication. Known as the Mile High City, Denver boasts 300 days of sunshine, a vibrant arts scene, and a thriving culinary landscape. From historic Larimer Square to the bustling shops and restaurants of Union Station, the city seamlessly combines Old West charm with modern innovation.

Outdoor enthusiasts can explore scenic parks, hike nearby trails, or take a short trip to Red Rocks Amphitheatre for breathtaking views. Sports fans can catch a game at Coors Field or Ball Arena, while culture lovers can visit the renowned Denver Art Museum. Denver offers the perfect backdrop for inspiration, connection, and adventure.

Hotel Information

This year's conference will be held at the Hyatt Regency Denver at Colorado Convention Center located at 650 15th Street, Denver, CO 80202. Reservations can be made online or by calling 800-223-1234. You will need to specify Upstream Academy to receive the special conference rate of \$279.00. We recommend making your reservation by June 18, 2025. If you have any problems with hotel reservations, please don't hesitate to contact us for assistance.

Conference Meal Information

The conference will run from 8am to 5pm on Thursday, and from 8am to 12:30pm on Friday. Upstream will provide a continental breakfast starting at 7am each day, breaks on each day, and lunch on Thursday. You and your adult guest are welcome to join us for a networking reception at 5:15pm on Thursday. Participants are on their own for dinner.

Continuing Professional Education

Upstream Academy will recommend 13 hours of CPE credit for participation in this course. Prerequisite: None Skill Level: Overview Learning Objectives: After attending the HeadWaters Conference you will be able to identify and implement improvements to your leadership skills, as well as your firm's processes.

Upstream Academy is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

