



JULY 16-17TH, 2026
25TH ANNIVERSARY

HEADWATERS LEADERSHIP CONFERENCE

LEGACY IN MOTION

Your firm's legacy isn't built by standing still.
It's shaped by leaders willing to move with intention.

As HeadWaters celebrates 25 years, we invite you to look
at where your firm has been and where it's going next.

Join us for HeadWaters 2026 as renowned speakers
share practical insights, real-world experiences,
and proven approaches to leadership,
growth, and succession.

Legacy isn't something you inherit.
It's something you create
in motion.

HEADWATERS SPEAKERS & FACILITATORS

Join us at HeadWaters for sessions on:

- Learning to reflect while advancing
- Balancing the past and future firm
- Building your firm with intention
- Taking on new leadership roles
- Fostering psychological safety
- Forging your own career path
- Finding passion in leadership
- Finding purpose in your firm
- Leading through transition
- Building a growth mindset
- Creating annual rhythms
- Preparing others to lead
- Redefining competition
- Living your values



Heath Alloway
Growth Partner
Sorren



Dr. Rachel Anevski
Managing Partner of
People & Leadership
Winding River Consultancy



Marty Brown
CEO
PYA



Larissa Bunker
COO, Principal
Nichols Accounting
Group, P.C



Jonathan Clark
Tax Partner
RKL LLP



Jeremy Clopton
Managing Director
Upstream Academy



Erica Costanzo
Talent Development
Leader
Aprio Alliance



Courtney De Ronde
CEO
Forge Financial &
Management Consulting



Nicole DeRosa
Director of Tax
SKC & Co. CPAs, LLC



Sarah Krom
Managing Partner
SKC & Co. CPAs, LLC



Mike Maksymiw
Director
Aprio Alliance



Nathen McEown
CEO
Whitley Penn



John Sensiba
Partner
Sensiba LLP



Jeremy Thibodeaux
Partner
Ericksen Krentel



Jake Thompson
Keynote Speaker +
Performance Coach
Compete Every Day

WEDNESDAY, JULY 15TH 2026

6:00 - 7:00pm **Opening Reception**

Join us for complimentary appetizers and beverages, and the chance to connect with colleagues from across the profession. This opening reception will give you a chance to meet your peers before the conference and get a head start on networking.

THURSDAY, JULY 16TH 2026

6:15 - 7:00 am **Sunrise Zumba**

Start your day energized with Zumba led by Nicole DeRosa. This upbeat, all-levels workout is the perfect way to get moving, boost your energy, and have some fun. Join us for a refreshing start that will leave you feeling motivated and ready for the conference ahead.

7:00 - 8:00 am **Breakfast**



8:00 - 8:15 am **Welcome**

8:15 - 9:15 am **The Future is Written by the Leaders Who Show Up** *Jeremy Clopton, Managing Director at Upstream Academy*

Every firm is writing its next chapter, whether by choice or by chance. Join Jeremy as he challenges you and your firm to take control of the legacy you build with intention, not inertia. He'll discuss defining your values, clarifying your vision, and taking purposeful steps toward the future you want. Legacy isn't something you receive – it's something you create.

9:15 - 9:30 am **Break**

9:30 - 10:30 am **No Permission Needed: Building the Career You Believe In**

*Sarah Krom, Managing Partner at SKC & Co. CPAs, LLC
Nicole DeRosa, Director of Tax at SKC & Co. CPAs, LLC*

Success rarely follows a straight path. This session highlights stories of leaders who have built meaningful careers by forging their own paths, embracing risks, and making an impact in business. In this session, Sarah and Nicole will share key themes and lessons learned that emerged from in-depth interviews with leaders in various industries. You will leave inspired and equipped to take bold, actionable steps forward — without waiting for permission.

10:30 - 10:45 am **Break**

10:45 - 12:00 pm **Compete Every Day**

Jake Thompson, Keynote Speaker + Performance Coach at Compete Every Day

Your firm's legacy isn't built in a moment - it's earned through daily standards that outlast motivation. Most firms compete to protect their reputation after success. Elite firms compete to raise their standard. Jake Thompson challenges how accounting leaders define competition and equips them to build the disciplines that sustain client trust, team performance, and lasting legacy when no one's watching.

12:00 - 1:00 pm **Lunch**

1:00 - 1:45 pm **Concurrent Sessions: Block 1**

See Website for Full Descriptions

- **Making Growth Everyone's Job**
Heath Alloway, Growth Partner at Sorren
- **Humanity in Leadership: Cheat Code for the Future**
*Mike Maksymiw, Director at Aprio Alliance
Erica Costanzo, Talent Development Leader at Aprio Alliance*

THURSDAY, CONTINUED....

1:00 - 1:45 pm **Concurrent Sessions - Block 1 - Continued**

Train Your Successor™

Dr. Rachel Anevski, Managing Director of People & Leadership at Winding River Consultancy

Winning Cultures Workshop

Jake Thompson, Keynote Speaker + Performance Coach at Compete Every Day

1:45 - 2:00 pm **Break**

2:00 - 2:45 pm **Concurrent Sessions - Block 2**

See Website for Full Details

- **Leading While the Firm Is Still Evolving: Finding Your Voice During an Active Transition**
Jeremy Thibodeaux, Partner at Ericksen Krentel
- **The Power of Passionate Leaders**
Larissa Bunker, COO & Principal at Nichols Accounting Group, P.C
- **What Five Partner Exits Taught Me About Leadership**
Sarah Krom, Managing Partner at SKC & Co. CPAs, LLC
- **The Leader's Pace: Running with Purpose**
Jonathan Clark, Tax Partner at RKL LLP

2:45 - 3:00 pm **Break**

3:00 - 5:00 pm **Breakout sessions**

Upstream Academy Faculty

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

5:15 - 7:00 pm **Main Reception**

Join us for complimentary appetizers, drinks, music, and the chance to connect with colleagues from across the profession. This optional event is the perfect opportunity to build relationships with other firms and unwind with your peers. We hope to see you there.

FRIDAY JULY 17, 2026

7:00 - 8:00 am **Breakfast**

8:00 - 8:10 am **Welcome**

Jeremy Clopton, Managing Director at Upstream Academy

8:10 - 9:25 am **Planning to Scale: Turning Today's Vision into Tomorrow's Legacy**

Courtney De Ronde, CEO at Forge Financial & Management Consulting

Legacy isn't accidental. It's the result of leaders who intentionally translate vision into clear priorities, aligned budgets, and scalable structures. Courtney will share a system for creating annual rhythms that sustain growth without chaos. Attendees will leave with a repeatable process to help their teams focus, align resources, and carry the firm's vision forward into the next 25 years.

9:25 - 9:40 am **Break**

9:40 - 10:40 am **Leading After Legacy: Lessons from Year One as the New CEO**

Nathen McEown, CEO at Whitley Penn

Stepping into a longtime leader's shoes comes with both weight and opportunity. In this transparent session, Nathen shares the lessons, missteps, and breakthroughs from stepping into the CEO role after a 20-year predecessor. Using humor, humility, and real examples, he'll unpack what worked, what didn't, and how to lead through change while strengthening culture and continuity.

10:40 - 10:55 am **Break**

10:55 - 12:10 pm **Beyond the Numbers: Shaping Purpose-Driven CPAs for the Next 25 Years**

John Sensiba, Partner at Sensiba LLP

The next era of accounting requires more than just technical skill – it demands purpose. This session encourages firms and individuals to go beyond compliance and focus on making an impact. You'll learn ways to help your teams think beyond compliance, engage meaningfully, and create lasting value for clients, communities, and the future of the profession.

12:10 - 12:30 pm **Closing comments**

Jeremy Clopton, Managing Director at Upstream Academy

ATTENDEE TESTIMONIALS



Adrienne Breakwell, Partner at Kingston Ross Pasnak LLP

"Every time I leave this conference, I'm excited to implement a change to better my career and those around me. Also, sometimes I find when I am in a room with so many brilliant minds, the 'imposter syndrome' creeps in; I don't find that happening here."



BJ Lippert, Managing Partner at Donovan CPAs & Advisors

"Headwaters is a shot of adrenaline to my professional experience each year. The hardest part of attending is determining which of the incredible ideas from the conference deserve priority in our firm's strategic plan."



David Neumann, Managing Director at Piltz, Williams, LaRosa & Company

"I would highly recommend Headwaters to any CPA. The speakers definitely gave out all the tools needed to implement new ideas and how to avoid the pitfalls to effect positive change for our firm."



Andrea Diaz, Partner at SKC & Co. CPAs, LLC

"Every time I attend Headwaters I come away with many actionable ideas. Always great content and great connections. A+ team!"



Jonathan Clark, Tax Partner at RKL LLP

"Thanks to the UA team for hosting such a wonderful conference. Well planned, well executed and extremely worthwhile - kudos to an awesome team!"

OUR COMMITMENT TO YOU

At Upstream Academy, we believe great conferences should inform, inspire, and deliver meaningful value. From renowned speakers and engaging sessions to discussion sessions designed to solve real-world problems, HeadWaters is intentionally designed to help you grow as a leader and move your firm forward.

We stand behind the quality of our events and your experience. If you have questions or issues at any point, please contact us; we're here to support you and ensure HeadWaters is a valuable and rewarding experience.

Email: info@upstreamacademy.com

Phone: 406-495-1850



Hotel Information

This year's conference will be held at the InterContinental Chicago Magnificent Mile located at 505 N Michigan Ave, Chicago, IL 60611. Reservations can be made online or by calling 1 (800) 424-6835. Over the phone, you'll need to specify the code KZE to receive the special conference rate of \$279.00. We recommend making your reservation by June 15, 2026. If you have any problems with hotel reservations, please don't hesitate to contact us for assistance.

Transportation

The hotel is located approximately 30 minutes to 1hr from Chicago O'Hare Airport, depending on traffic.

Cost and Registration

Registration is \$1,500 per person (\$1,275 for UAN members). To register, go to <https://upstreamacademy.com/headwaters> or call (406) 495-1850.

Cancellation Policy

Registrants will be refunded registration fees less a \$100 cancellation charge, if they notify Upstream before June 15, 2026. After this date, only \$200 will be refunded.



Upstream Academy will recommend CPE credit based on the level of CPE participation in this course. Prerequisite: None Advanced Preparation: None Skill level: Overview 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 addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Website: www.nasba.org

A photograph of the Chicago skyline at sunset, with the Willis Tower prominently featured in the center. The sky is a mix of orange, yellow, and blue, and the city lights are beginning to glow.

CHICAGO

SET AGAINST THE ICONIC SKYLINE OF LAKE MICHIGAN, CHICAGO OFFERS THE PERFECT BACKDROP FOR LEARNING, CONNECTION, AND INSPIRATION. KNOWN FOR ITS WORLD-CLASS ARCHITECTURE, VIBRANT NEIGHBORHOODS, AND RICH CULTURAL SCENE, THE CITY BLENDS BIG-CITY ENERGY WITH MIDWEST WARMTH. FROM AWARD-WINNING DINING AND RENOWNED MUSEUMS TO SCENIC RIVERWALKS AND HISTORIC LANDMARKS, CHICAGO INVITES YOU TO EXPLORE, RECHARGE, AND CONNECT, MAKING IT AN UNFORGETTABLE SETTING FOR CELEBRATING 25 YEARS OF HEADWATERS AND THE NEXT CHAPTER AHEAD.