



# Crowe MacKay's PD & Business Insight Conference

## Agenda

Time	Session Title	Presenters	Session Description
<b>Tuesday, November 19</b>			
10:00 – 11:00 a.m. PST	Protecting Yourself from Cyber Threats	Cameron Inglis	This session will explore recent events related to third-party risks, AI fraud, and other cyber threats, along with potential preventative measures that could be implemented/taken.
12:00 – 1:00 p.m. PST	Income Tax Update	Garrett Louie & Indeeep Mangat	This session will provide an overview of recent tax developments and planning opportunities.
<b>Wednesday, November 20</b>			
10:00 – 11:00 a.m. PST	Intergenerational Business Transfers	Ray Loucks	This session will include an overview of the new tax rules relating to intergenerational business transfers and their impact on family business continuity.
12:00 – 1:00 p.m. PST	Purchasing and Selling Businesses	Daniel Sturgess	This session will explain what is involved in the purchase and/or sale of business interests in the mid-market. We will review typical steps in an M&A divestiture process, as well as what is involved in buy-side M&A advisory.
<b>Thursday, November 21</b>			
10:00 – 11:00 a.m. PST	Anti-Money Laundering	Emily Chee	This session will cover key terms related to money laundering, what it is, and how to implement anti-money laundering controls/practices in your organization.
12:00 – 1:00 p.m. PST	Avoiding and Managing Common Financial Management Pitfalls for Growth Companies	Matt Thurber	This session will highlight common back-office pain points for high-growth companies (e.g. financial forecasting, international tax compliance, accounting processes), and how to plan for and manage risk in these areas.