

JODY PADAR

Author, Speaker, Entrepreneur & Radical CPA

Embracing the Future Through Radical Transformation

Jody is one of the accounting profession's foremost visionaries and pioneers. Consistently named as one of the Top 100 Most Influential to the Profession by Accounting Today, Jody has led the transition of next-generation public accounting firms through open collaboration and change management. She is the author of *From Success to Significance: The Radical CPA Guide* and *The Radical CPA: New Rules for the Future-Ready Firm* and is CEO and principal of *New Vision CPA Group* in Chicago.



HOT SPEAKING TOPICS

A New Business Model for CPA Firms

Today's future-ready CPAs are operating at the intersection of user experience, technology and business. But what does that mean exactly? In this interactive session, we'll talk about why innovation and agility are related and how moving to the cloud will transform your firm's culture, business model and operations. You'll walk away with tips and strategies on how to roll with constant change and how you can take your firm to the next level.

Practice Every Day Innovation

Everyone tells CPAs they aren't innovative. That's just not true. Accountants use innovation every day when coming up with unique ways to help their clients. You need to learn how to tap this innovative side to make innovation part of your firm's DNA. By moving away from safe, tried and tested processes, you can build a culture that supports ongoing, consistent opportunities for innovation. In this session, you'll learn what you need to do to radically change your business and hear what forms of every day innovation are happening across the industry.

Transformation Starts with Product Management

When you price an engagement, do you start with scope and the hours needed to complete the work? If so, you focus solely on process when you should be focused on one thing—producing desirable results for a client. You have to think about what you sell as products composed of process, people, data and a result. Learn what it means to be a product manager, how-to create a productized service and see how something as simple as a 1099 can be productized. Then use these skills across the firm to transform every aspect of your practice.

The Radical CPA: New Rules for the Future Ready Firm

There are fundamental tenets of a future-ready, customer-centric firm built for today's rapidly changing business environment. You will get an overview of how working in the cloud and streamlining workflows allow you to deliver enhanced client services, and how the shift to social media channels can attract and serve profitable clients. Learn how re-inventing internal firm processes and procedures helps create a new accounting firm business model of flexible, results-driven workplaces, client focus and value-pricing.

PRAISE FOR JODY...



"Jody is very upbeat, entertaining and informative. This is a must attend for anyone who wants the way they practice to represent our true value to our clients."

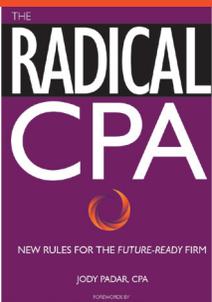
- Anonymous conference attendee

"Jody does an admirable job of challenging many of the legacy beliefs and processes that limit CPA firms' ability to be truly innovative today"

- Joey Havens, CPA, CMG
Executive Partner, Horne LLP



- Bob Jahelka, CPA, CFF, PFS
Partner, DSJCPA



THE RADICAL CPA

On more than one occasion, Jody had been called a radical CPA. This is a concept she embraces so much that it's become the foundation for her two books. Learn what it means to be a Radical CPA.

From
Success to
Significance:
The
Radical CPA
Guide

Jody Padar CPA



AUDIENCES

Jody has presented keynotes and breakout sessions to audiences ranging from 25 to 400, with an average speaker rating above four on a 5-point scale. Audiences included:

- AICPA Practitioners and TECH+
- Sage Summit
- CCH User Conference
- MACPA
- Business Learning Institute
- Association for Accounting Marketing
- CPA Academy
- Long Island Tax Symposium
- The Accounting & Finance Show NY

View her presentation style in this video.

POTENTIAL BREAKOUT SESSIONS

Cloud Marries Practice Management: Navigating Thru this New Relationship. Is it the perfect match or has it been a bumpy first year of marriage? What are the dos and don'ts to make this marriage work? Attendees will be part of the conversation so bring your love and war stories!

You Have Your Dad's Firm, Now What? When you take over an accounting firm, you walk a fine line between tradition and blazing your own path. In this session you see how, through many innovations, successes and failures, a new firm can be created. With a focus on bringing greater value to the customers, the owners can also have more enjoyment!

Navigating Crowd-Sourced Tax Research. A new way of conducting research today can be found in crowdsourcing. Through group idea sharing, you'll get answers to tax questions and hear others' concerns around the topic. When done right, it also provides the strategies for follow-up, even if you don't provide a single authoritative answer to the question.

Workflow: You've Got to Move it, Move it! How do you make born-digital, scanned and paper materials workflow part of "the norm" in your firm? It takes a mix of discussion focused on the need for firm-wide strategies, the viability of workflow across different software platforms and generational/work style issues. Discussion includes the abilities and limitations of specific tools and the broader idea of how to collaborate and build better tools.

Journey Mapping Your Clients Into Your Firm's Ecosystem. Apply design thinking principles to your firm's process for a greater return on marketing, brand and ultimately income. Learn how journey mapping can help you understand your customer's experience, examine and review all inputs, design a new process and create a road map of all the processes you need to rethink for today's customer.

Developing a Gig Economy Practice. How do you address the financial issues that keep freelancers up at night—such as forming an entity, liability, estimated taxes and capturing expenses, just to name a few. This session will cover how the cloud is critical in managing this relationship and the technology a firm can use to work with creative, freelance customers.

Get Ready for the Future

If your CPA firm has a radical vision of the future and needs a roadmap to get there, Jody Padar can show you the way. As a recognized expert in accounting, change management and innovation, she is disrupting the "way we've always done it." Help your audiences become inspired and ready to take their firms to the next level with Jody's guidance.

ABOUT JODY

Jody Padar is CEO and principal of New Vision CPA Group in Chicago. Her background as an author, lecturer, coach, consultant and mentor gives her a breadth of experience in innovation, technology and change management.

Jody has shared her expertise on the "new firm" business model with the AICPA, CPA Trendlines and Accounting Today. She has been quoted by *Bloomberg*, *Forbes* and *The Washington Post* and regularly contributes to QuickBooks' blog.

One of the Top 100 Most Influential People by *Accounting Today* since 2011, Jody is also an *Accounting Today* Managing Partner Elite since 2015, and one of the Top 10 Money & Finance Writers on LinkedIn's Top Voices list.

She earned her BBA from Saint Mary's College and MST from Northern Illinois University. She is also an adjunct professor at Oakton Community College and contributing member of the Intuit Trainer Writer Network. Jody is a member of AICPA and MACPA.

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