

2025 Financial Management & Operations Conference



**Hermitage Hotel
Nashville, TN
November 4 & 5**

Join your colleagues
for a conference which
encourages interactive
discussions on topics that
members deal with on a
day-to-day basis.



CONFERENCE SCHEDULE

TUESDAY, NOVEMBER 4

8:00 - 9:00am	Registration Breakfast
9:00 - 10:15am	Real Estate Outlook Tim Coy, Research Leader-Commercial Real Estate, Deloitte Renea Burns, Audit & Assurance Partner, Deloitte
10:15 - 10:30am	Break
10:30 - 11:45am	Reimagining Work: Agentic AI and Process Automation Paul Ricci, Partner, CohnReznick
11:45 - 1:00pm	Lunch with Table Talk: Fast-Paced Networking over Food
1:00 - 2:15pm	The Big, Beautiful Tax Update Devin Tenney, Director-Washington National Tax Office, Forvis Mazars Chandler McCall, Tax Senior Manager, Forvis Mazars
2:15 - 3:30pm	Smart Coverage - Insurance in the Workplace Maxx Hoffman, Partner, Connor Strong & Buckelew
3:30 - 3:45pm	Break
3:45 - 5:00pm	Hot Topics in Real Estate Moderators: Margaret Fitzgerald & Jeff Olson
5:00 - 6:30pm	Happy Hour on the Hotel Veranda Sponsored by



WEDNESDAY, NOVEMBER 5

7:30 - 8:00am	Breakfast
8:00 - 9:15am	Optimizing your Back-Office Accounting and Financial Functions Nicole Chavez, Senior Manager, Baker Tilly
9:15 - 9:30am	Break
9:30 - 10:30am	Legal System Abuse Reform Update William Lynch, VP & Cjoef State & Local Affairs Officer, Liberty Mutual Insurance Elise Klosterman, Director of Strategic Policy Enablement, Liberty Mutual Insurance
10:30 - 11:45am	Year-End Accounting & Reporting Update Stacie Burke, Sr. Manager, Assurance, Ernst & Young Matt Pomranke, Sr. Manager, Assurance-Real Estate, Ernst & Young

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PROGRAM OBJECTIVES

Learning Objective: At this conference, you will enhance your knowledge of the real estate industry while learning practical applications and updates on emerging accounting, tax and technology issues including current GAAP and tax changes and updates on issues dealing with real estate. Additionally, there will be in depth discussion on lease accounting changes, valuations, acquisitions and audit risks.

Program Level: Update

Prerequisite: A knowledge of the financial workings of the real estate industry. No advanced preparation required.

Delivery Method: Group Live

CPE total for Conference 12

Refund/Cancellation Policy: Conference registration fees are not refundable after October 20th. Refund requests should be sent by email. There is a \$25 processing fee for all cancellations.

Please contact the NAREC office at info@narec.org regarding any concerns or questions.



NAREC 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.

HOTEL INFORMATION

The Hermitage Hotel

231 Sixth Ave North

Nashville, TN

Book your room by October 4th for the group rate of \$379/night.

Call 888-888-9414 or [go online](#).



REGISTRATION

Conference Fees for 12.0 CPE Hours

NAREC Member \$475 _____

Non-Member \$600 _____

To register, send this form with your check payable to NAREC to:

NAREC | 5709 Topsail Greens Dr. | Chattanooga, TN 37416

Or register online using a MasterCard or Visa at: www.NAREC.org (click on the Conferences tab)

Registration deadline is October 20, 2025.

First Name

Last Name

Title

Company Name

Company Address

City

State

Zip

Phone

E-mail address

TOTAL ENCLOSED \$ _____