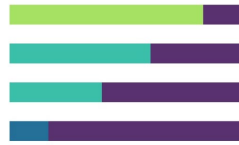




The Institute of
Internal Auditors

Northeast Ohio



THE
OHIO SOCIETY
OF CPAs

ADVANCING THE STATE OF BUSINESS



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northeast ohio chapter
connecting financial executives

NEO IIA, Ohio Society of CPAs & Northeast Ohio Financial Executives International Joint Meeting

March 5, 2024

NEOIIA/OSCPA/NEO FEI Joint Meeting: 1:45 p.m. – 5:30 p.m. (4 CPEs)

IIA Members: \$115/in-person only (Dinner & Cavs ticket included)

OSCPA Members: \$115/in-person only (Dinner & Cavs ticket included)

NEO FEI Members or Strategic Partner: \$115/in-person only (Dinner & Cavs ticket included)

Non-Members: \$135/in-person only (Dinner & Cavs ticket included)

Friends & Family Tickets: \$109 (Dinner & Cavs ticket included)

Register Online at:

[NEOIIA/OSCPA/FEI Joint Meeting](#)

Northeast Ohio IIA is happy to announce that we are hosting, in conjunction with the Ohio Society of CPAs and Northeast Ohio Financial Executives International. Please join us for 4 hours of engaging learning with 4 CPE credits (details on pg. 2), an industry networking dinner and a Cleveland Cavs game.

The NEOIIA/OSCPA/NEOFEI Joint Meeting will be held in-person at Rocket Mortgage Fieldhouse (1 Center Court, Cleveland, OH 44115). Tickets will be distributed virtually via Seat Geek. Please be sure to register with the email linked to your Seat Geek account or an email you can access via your smart phone the day of the event. Attendees may enter through the Cleveland Cliffs Entrance located on the corner of East 6th and Huron Road. The meeting will be followed by dinner/networking and include a ticket to see the Cleveland Cavaliers vs. Boston Celtics. Tip-off for the game is scheduled for 7:00 PM EST.



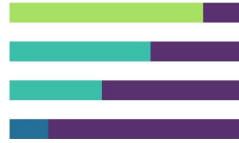
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Thank you to our Sponsor: Duffy & Duffy



Payment by cash will not be accepted at this time. For anyone that needs to pay for an event by check, please send to the following address (please do not use the address that appears on the payment page):

NEO Institute of Internal Auditors
PO Box 311008
Independence, OH 44131

We are pleased to offer this event to our retired, in-transition members, and current higher education faculty and students free of charge. Retired and in-transition members should register under the appropriate categories within the event website. Please contact [Jonathan Sanfilippo](#) if you have any questions.

OSCPA members with questions should contact [Ellen Brown](#) to register.

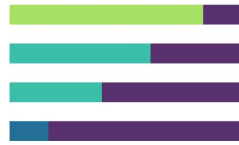
Event Schedule:

1:45 – 1:50	Opening Announcements
1:50 – 2:55	Harold Silverman (Institute of Internal Auditors) Topic: The new Global Internal Audit Standards - Why Financial Executives, CPAs and Internal Auditors Should Care
2:55 – 3:10	Break
3:10 – 4:35	Scott Wiley (Ohio Society of CPAs) Topic: An Overview of the Business Climate in Ohio
4:35 – 5:25	Allison Ikeda and Eric Flanders (BMO) Topic: Rates and Foreign Exchange
5:25 – 5:30	Closing Announcements
5:30 – 7:00	Dinner/Networking



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7:00

Cleveland Cavaliers vs. Boston Celtics

Presenter Bios:



Harold Silverman is the senior director of CAE & Corporate Governance Engagement at The IIA. In this role, he provides thought leadership on emerging trends and leading practices to audit leaders and leads advocacy efforts for the profession with internal audits' stakeholders and the organizations that influence internal audits' stakeholders.

Harold was previously vice president of internal audit at The Wendy's Company. Prior to Wendy's, he was the VP of internal audit at Houghton Mifflin Harcourt Publishing Co. Harold has also held internal audit positions at Raytheon Co. and PwC.



OSCPA President and CEO Scott Wiley leads a team that creates and delivers innovative advocacy, education, and business solutions for Ohio's CPAs and accounting professionals. In his role, Wiley has proven himself to be a powerful agent for positive change. His efforts to meet the changing demands of an evolving workforce and rapidly changing business environment have been featured in publications such as Talent Generation, Pivot Point, and Becoming Essential that chronicle leading-edge thinking for organizations and their executive leadership. Since his appointment in 2013, Wiley has repositioned OSCPAs to deliver greater member value. He has refocused staff resources, products, and services,

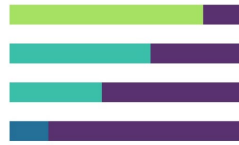
and launched a new mission, vision, and brand that are reflective of OSCPAs' commitment to advance and diversify the accounting profession and support members as Ohio's top strategic financial advisers.

Under Wiley's leadership, OSCPAs has advanced and modernized continuing education for CPAs. OSCPAs was the first state CPA association to launch a successful online learning platform and Ohio was the first state to approve nano learning for CPA continuing education credit. This strategic



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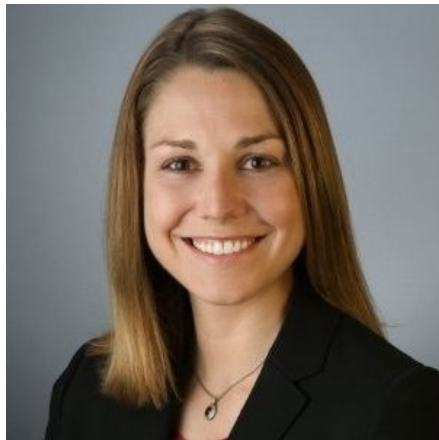


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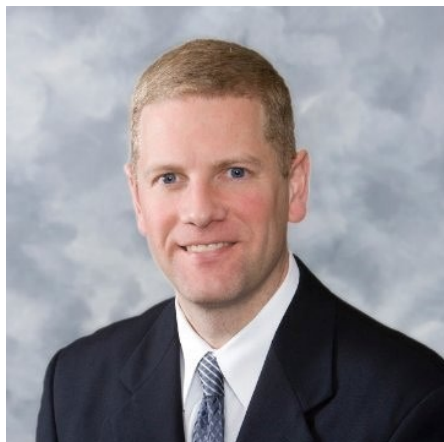
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move emphasizes that learning formats must be flexible and evolve to meet the needs of a new generation of professionals.

Mindful of America's changing demographics, Wiley is making a diverse and inclusive CPA talent pool a top priority in Ohio. As president of The Ohio CPA Foundation, which funds programs to grow and strengthen Ohio's CPA talent pool, Wiley has led the launch and capital funding efforts for the nation's largest accounting workforce development initiative.



Allison Ikeda is a Director in the Corporate Sales and Structuring Group at BMO Capital Markets in New York. Allison joined BMO in July 2008 and is responsible for helping clients understand and mitigate interest rate exposure. Allison holds a BS in Mathematics from Villanova University.



Eric Flanders joined BMO in November 2000 and focuses on foreign exchange risk management for corporate clients. Eric holds a BS in Accounting from the University of Illinois at Urbana-Champaign and an MBA from the Booth School of Business at the University of Chicago. He is a CPA and a CFA charter holder.