

AGENDA

THE Rehmann SUMMIT MICHIGAN 2025

8:00 - 8:30	REGISTRATION & BREAKFAST	
8:45 - 9:35	YOUR TECHNOLOGY Gain actionable insights and practical strategies as Jim and Jessica cover real-world cybersecurity cases, essential risk advisory practices, and AI planning techniques to boost resilience, streamline operations, and prepare for the future.	Jim Bruxvoort, MBA, ITIL Foundation Certified Principal, <i>Director of Rehmann Technology Solutions</i> Rehmann Jessica Dore, CISA Principal, <i>Risk Advisory Services</i> Rehmann
9:45 - 10:45	YOUR FUTURE PLAN One fundamental truth at the heart of business transition planning is that every journey is unique. Your organization, along with your goals, challenges, and circumstances, is one of a kind. While starting your exit planning process early is incredibly beneficial, the steps you take won't always follow a straight, linear path.	Tom Wiggins, CFP®, CPFA, CTFA, M.S.M Principal, <i>Director of Private Client Advisory</i> Rehmann Gerald Wernette, CPA, CEBS, AIFA®, C(K)P®, CEPA Principal, <i>Director of Retirement Plan Consulting</i> Rehmann Elizabeth Williams, SHRM-SCP, SPHR Principal, <i>Director of Human Resource Solutions</i> Rehmann Melissa Rood, CPA Senior Manager, <i>Finance and Accounting Solutions</i> Rehmann
11:00 - 11:50	YOUR COMMUNITY Join us for an insightful discussion on the power of community and resilience in navigating economic uncertainty — what could an economic recession mean, who does it impact, and what can you do?	Sejla Kulaglic, CPA Principal, <i>Advisory & Tax Services</i> Rehmann Ellen M. Gilchrist Chief Executive Officer BasBlue Ned Staebler Vice President, <i>Economic Development</i> Wayne State University President and Chief Executive Officer TechTown
	LUNCH	
1:00 - 1:50	ELEVATING YOUR ORGANIZATION Strong leadership and a resilient organizational culture are the backbone of every successful company. This session explores strategies for developing effective leaders, aligning teams, and transforming workplace dynamics to drive performance and growth.	Elizabeth Williams, SHRM-SCP, SPHR Principal, <i>Director of Human Resource Solutions</i> Rehmann Amy Schaden Principal, <i>Human Resource Solutions</i> Rehmann
2:00 - 2:50	YOUR TAX PLANNING OPPORTUNITIES The impact of the “One Big Beautiful Bill”, planning strategies to maximize R&D tax credits, and planning incentives to consider — this session is designed to help you stay informed and build a proactive plan.	Anthony Licavoli Jr., CPA Principal, <i>Director of Tax Consulting, Advisory & Tax Services</i> Rehmann Mandy Chardoul, CPA, MST, CFP® Principal, <i>Advisory & Tax - Private Client Advisory</i> Rehmann Paul Mene, JD Senior Manager, <i>Advisory & Tax Services</i> Rehmann
3:00 - 3:50	YOUR SIMPLE APPROACH TO SECURITY Fraud prevention doesn't have to be overly complicated. Join us for an engaging session on the “Keep It Super Simple” approach to combating fraud. We'll explore how internal controls serve as your frontline defense.	Chuck Story, CPA, CFE Principal, <i>Director of Corporate Investigative Services</i> Rehmann Kristy Clark, CPA, CIA Principal, <i>Risk Advisory Services</i> Rehmann
	CLOSING & HAPPY HOUR KICK OFF	