

Hot Topics – current list

- Continuation of COA standardization discussion – **Fall 2025**
- Asset Onboarding and Investment Structure standardization discussion – **Fall 2025**
- Data Submission and Aggregation: Challenges with multiple sources and data conversions
 - Key pain points and red flags from past projects
- Culture & Silos: Oversight perceived as bureaucracies/friction between IT/Accounting systems and Accounting Teams
 - Impact on collaboration and efficiency
- System Implementations: Who leads accounting system implementations/projects?
 - Governance and accountability structure
 - Lessons Learned and critical insights from previous implementations; risks to anticipate and avoid
- GL/TB workflow case study
- A.I.
 - Dispelling A.I. myths
 - What else to think about for A.I.
 - Use case specific?
 - Quantity of data sets
 - What is needed?
 - How does A.I. actually work?
 - Legal implications
- Data Lake
 - Leveraging for AI use cases
 - What elements go into it
 - What is in there for reporting, what isn't?
- Challenges in growing technology
 - Disruptive Technology
 - A.I. could be a part of broader discussion on this, or it could be a discussion solely on A.I.
 - Trying to Keep up
 - Getting people to adapt to new technology – “I do it in Excel and that works for me”
- Ask the question “Why don’t we have solutions”
 - Discuss reasons why, what can we do, how do we get the data we want and where will it live, etc.
- Use cases for data management tools – RPA
 - What works / what doesn't
 - Issues around simulating user – passing username/password
- What technology is available to help create reporting or dashboards
- How can we use technology to share data
- Asset and Investment Best Practices perspective (Reporting Standards Council)

Completed Topics

- Data Governance and Workflow
 - Developing and Maintaining a Chart of Accounts – **Fall 2024 Conference**
 - Workflow Case Study through the lens of the valuation process – **Fall 2024 Conference**
- AI Teaser
 - Is AI About to Unleash an Incoming Storm of Innovation & Efficiency in Real Estate? – **November 2023 Conference**
- Solutions Expo related
 - Going through a Lift-Out retrospective– **April 2023 Conference**
- Session that “dumbs down” tech – **November 2022 Conference**
 - Ex, what is API, ETL, understanding the basics
- Revisit the “Build It or Buy It” panel that was put on a few years ago – **November 2022 Conference**