COPAS Education Event
Fall 2025 Meeting
Tuesday, October 21, 2025
Kansas City, MO

TIME	AGENDA ITEM	DISCUSSION LEADER

1:00 p.m. **Welcome and Introductions** — **Carolyn Sczepanski & Jeff Wright**

Antitrust Statement
Introductions

1:05 p.m. **Making Sense of Overhead** — **Jeff Wright, 4A Energy Advisors LLC**

We will review the different overhead options available in COPAS Accounting Procedures and discuss how to correctly apply them.

Learning Objectives - By the end of this session, you will be able to:

- Identify the different overhead options in COPAS Account Procedures
- Recall how to correctly apply overhead options
- Identify special overhead circumstances

Program Level: Basic
Pre-requisite: None
Advance Preparation: None
Delivery Method: Group Live
Field of Study: Accounting
CPE Credits: 1.0

2:00 p.m. **Mind the Dormancy: Oil & Gas Unclaimed Property – Strategy Basics & Updates** — **Nikki Naylor, VP of Product for PakAccounting, PakEnergy**

As rules evolve and state requirements shift, unclaimed property compliance has become a high-stakes priority for oil & gas holders. In this focused session, escheat expert Nikki Naylor translates rules into practical steps to stay compliant, minimize penalties, and keep processes audit ready.

Learning Objectives - By the end of this session, you will be able to:

- Recall Unclaimed Property Core Concepts: Priority Rules, Dormancy, Due Diligence, and Reporting
- Describe Process Improvements: Strategies to reduce risk with better workflows
- Discuss Critical Legislation Updates**:** Unclaimed Property rules are constantly changing

Program Level: Basic

Pre-requisite: None
Advance Preparation: None
Delivery Method: Group Live
Field of Study: Specialized Knowledge
CPE Credits: 1.0

3:00 p.m. **Break**

3:15 p.m. **AI in Revenue Accounting** **Chris Copeland, VP of Physical Solutions, AEGIS Hedging**

We will discuss relevant tech acronyms and recent updates, primarily related to AI. The presentation will provide practical examples of how tech and AI can be applied by oil & gas accountants for process improvement and analytics.

Learning Objectives - By the end of this session, you will be able to:

- Recall relevant tech and AI tools available as well as recent updates
- Demonstrate how AI can be applied to solve issues faced by oil and gas accountants
- Encourage adoption of AI and analytics tools in the workforce to improve processes and enhance decision making

Program Level: Basic
Pre-requisite: None
Advance Preparation: None
Delivery Method: Group Live
Field of Study: Information Technology
CPE Credits: 1.0

4:05 p.m. **Leading at the Speed of Energy** **Shaler Tate, Aethon Energy**

This will be a discussion around the evolution of leadership within the oil and gas industry. Growing demand for experienced accountants has necessitated the adoption of more progressive leadership principles.

Learning Objectives - By the end of this session, you will be able to:

- Recall how to lead without a formal title
- Discuss a variety of progressive leadership tactics
- Know your worth when you are in demand

Program Level: Basic
Pre-requisite: None
Advance Preparation: None
Delivery Method: Group Live

Field of Study: Personal Development
CPE Credits: 1.0

5:00 p.m. **Adjourn**

Council of Petroleum Accountants Societies (COPAS), Inc. 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.