Accounting & Financial Women's Alliance
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Los Angeles Chapter

JOINT MEETING WITH IMA METRO

Navigating Ethics in a Digital World

Rachel Liao

Operations Leader and Founder of Cedarbluff RIA Partners



Learning Objectives

- Define the purpose of select emerging technologies as applied in accounting and finance.
- Identify examples of ethical challenges posed by the implementation of emerging technologies in accounting and finance.
- Describe how risks associated with emerging technologies relate to the *IMA Statement of Ethical Professional Practice.*
- Explain the ethical considerations needed to govern and manage data.
- Recognize how these ethical implications have created a need for upskilling across the accounting and finance profession.
- Overview, no prerequisite, virtual
- Qualifies for 2 hours CPE

Date:	Wednesday, December 2, 2026
Time:	5:00-5:30 PM; Logging on/Networking 5:30-7:30 PM: Program
Location:	Zoom Virtual Session-invitation links upon registering
Cost:	$20: Members or Students; $25 Non-members or Guests *please RSVP by Nov 30th; No Refunds; +$5 after Nov30th Late Sales end Dec 2nd at 3 PM
	To reserve on line with a credit card to: https://AFWA-IMA-Ethics-Digital-World.eventbrite.com
Information:	*Annette Christensen, MSAinLA@yahoo.com, 213-359-9835*

Speaker Information

RACHEL LIAO

Bio: Rachel Liao is an operations leader and the founder of Cedarbluff RIA Partners, where she works with advisory firms on operational structure: defining roles and accountability, designing workflow, implementing technology, and building the cross-functional process architecture that makes it work.

Her career spans fund operations for global asset managers at BNY Mellon, client solutions and hedge fund operations for global institutions at Wilshire, and operations leadership in private wealth. She has worked on process redesign and technology implementation, contributed to decisions on staffing structure and role definition and evaluated and managed outside providers across compliance, technology, HR, and marketing. She advises firms on that work through Cedarbluff RIA Partners.

She serves on the board of the IMA Los Angeles Chapter.

Official National Registry Statement

The Accounting & Financial Women's Alliance (formerly American Society of Women Accountants) 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.