

How AI Creates More Opportunity, Not Less: Imagine It in Your Practice

Attendees Earn 1 CPE Credit Hour per Course
Admission: \$10 for Guests, Free for Members

Register Here: <https://bterrell.com/ai-event-registration>



Tuesday
August 25, 2026
3:30 – 5:30 pm



North Dallas Bank & Trust Building
12900 Preston Road, Suite 210,
Dallas, TX 75230



Course Description

AI expands the profession rather than shrinks it. But, where to begin? This session answers that question by uncovering AI possibilities in the ordinary, time-consuming work every practice faces.

You'll watch AI take on the repetitive work nobody enjoys — organizing email correspondence that piles up, making sense of disorganized records, assembling and comparing what takes hours by hand. We'll use tools available today — each takes minutes to learn. You'll leave with both a sense of confidence that this is within reach and the resolve to sit down and try.

Major Topics

- Where to start: spotting tasks in your own practice worth handing to AI
- Seeing AI tame everyday chaos — the documents and email that pile up faster than you can file them
- Turning disorganized records into clean, review-ready output
- Assembling and comparing documents that today consume hours of manual work
- Choosing AI tools that are easy to use and affordable
- Using AI safely — keeping client data confidential and reviewing every output before it counts

Learning Objectives

- Identify the messy, labor-intensive tasks in your practice where AI delivers the most immediate value
- Evaluate how current AI tools simplify the everyday management of email, documents, and basic workflows
- Apply a practical approach to using AI tools in everyday tasks
- Recognize how privacy and review guardrails keep AI use appropriate for client work

Metroplex Practice Management Group is the CPE sponsor of record.

Texas State Board of Public Accountancy CPE credit information will be provided during the session.

Prerequisite: None | **CPE Credit Hours:** 1 Credit Hour | **Level of Knowledge:** Intermediate

Meet Speakers



Sara Berry
Software Engineer
at BTERrell Group

Sara Berry is a technology professional with over 20 years of experience in software development, quality assurance, and project leadership. She has delivered software solutions across telecommunications, pharmaceuticals, medical devices, and the electrical power industry. Sara also brings accounting and tax expertise, providing a well-rounded business perspective. She holds a Bachelor of Science in Computer Science from The University of Texas at Austin.