



CHICAGO  
CHAPTER

# LEADERSHIP SERIES

## PART 1

EARN 1  
CPE CREDIT

Tuesday | February 10, 2026

5:00 - 8:00 PM CST

400 E Randolph St, Chicago, IL 60601

**Guest Speaker:**

Adam J. San Juan

**Managing Director, Retirement Plan Services | RWS Financial**

Adam is a financial advisor with over 30 years of experience specializing in 401(k) plan advisory and financial planning services. As Managing Director at RWS Financial, he works with plan sponsors on fiduciary compliance, plan design, and organizational benefits strategy. Adam is also a published author and leadership development professional whose work examines the behavioral patterns that shape professional communication and organizational culture. He leads chapters of The Sunrise Networking Group in southeastern Michigan and Chicagoland, mentoring professionals on communication effectiveness and relationship-building. His books and twice-monthly newsletter, "Tips from the Top," explore how leadership reveals itself through response patterns rather than stated values, with particular focus on the dynamics that create—or silence—dialogue in professional settings.

### ABOUT THE PRESENTATION

Silence in professional environments is rarely a choice—it's learned. When questions are consistently met with certain responses, people adapt. They stop asking. They stop offering insight. Eventually, they stop believing their voice matters.

This presentation examines how ordinary responses—often justified, often unexamined—train people to withdraw in audit, client, and firm settings. These patterns don't require hostility. They feel reasonable in the moment. But when repeated, they teach people that speaking carries cost. For CPAs and auditors, recognizing these patterns is critical. Professional skepticism depends on the freedom to ask questions—and the ability to recognize when inquiry is being systematically shut down.

This session offers observation and pattern recognition, not prescription, to help participants protect audit quality and maintain professional judgment in challenging environments.

**Limited copies of the presenter's book, *The Anti-Leadership Playbook*, will be available at the event.**

Questions? Contact Adam San Juan, VP of Leadership, at [Adam@adamsanjuan.com](mailto:Adam@adamsanjuan.com)

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