

NASBA

31st Annual Conference for Board of Accountancy Legal Counsel

Austin, TX | March 24 - 26, 2026

Draft Agenda

Tuesday, March 24, 2026

9:00 am – 12:30 pm **New Board Counsel & Executive Director Orientation & Working Lunch** **Salon JK**

Presiding: Dale Atkinson, Esq.

Founding Partner & Attorney
The Atkinson Firm

Moderators: NASBA Legal Team

11:00 am – 2:00 pm **Registration for all other attendees** **Salon JK Foyer**

Executive Director & Legal Counsel Workshop

2:00 – 2:05pm **Welcome & Introduction** **(with Executive Directors)** **Salon JK**

Presiding: Martin Pittioni

Chair, NASBA Executive Directors Committee
Executive Director, Oregon Board of Accountancy

2:05 – 2:45 pm **Forensic Accounting/Former IRS Staff session**

Speaker: Jonathan Schnatz, CPA, CFF

Principal
Withum

2:45 – 3:30 pm **AICPA Enforcement**

Speaker: Jennifer Clayton, CPA, CGMA

Associate Director, Ethics Enforcement
AICPA

3:30 – 3:45 pm **Break** **Salon JK Foyer**

Tuesday, March 24, 2026 continued

3:45 – 4:30 pm	ADA Testing Accommodations Speakers: Adam Herjeczki Sr. Manager, Testing Accommodations/ADA Compliance NASBA Elizabeth Wolfe, Esq. Deputy Chief Legal Officer NASBA	Salon JK
4:30 – 5:15 pm	Unauthorized Practice Speakers: Marissa Brooks Director of Licensing/CPE/Peer Review Texas State Board of Public Accountancy Jerry Hill, Esq. General Counsel Texas State Board of Public Accountancy	
5:15 pm	Recess	
6:00 pm	Welcome Reception (with Executive Directors & State Society CEOs)	Salon H

Wednesday, March 25, 2026

7:15 – 8:30 am	Complimentary Headshots	Salon JK Foyer
7:30 – 8:30 am	Breakfast	Cannon + Belle
Plenary Session – Joint Room		
8:30 – 8:45 am	Welcome and NASBA Update (with Executive Directors & State Society CEOs) Presiding: Martin Pittioni Chair, NASBA Executive Directors Committee Executive Director, Oregon Board of Accountancy	Salon JK
8:45 – 9:15 am	NASBA Report from Leadership (with Executive Directors & State Society CEOs) Speakers: Nicola Neilon, CPA 2025-2026 NASBA Chair Daniel J. Dustin, CPA President & CEO NASBA	Salon JK

Wednesday, March 25, 2026 continued

9:15 – 9:45 am	Legal Update (with Executive Directors & State Society CEOs) Speaker: Brenner Allen, Esq. Chief Legal Officer NASBA	
9:45 – 10:15 am	Legislative Update (with Executive Directors & State Society CEOs) Speaker: John Johnson Vice President, Legislative and Governmental Affairs NASBA	
10:15 – 11:15 am	Mobility/Principal Place of Business (with Executive Directors & State Society CEOs) Speakers: Kent Absec Vice President, State Board Relations NASBA Frank Trainor, Esq. Staff Attorney North Carolina Board of CPA Examiners	
11:15 – 11:30 am	Break (Legal Counsel moves into separate session)	Salon JK Foyer
Legal General Session		
11:30 – 11:45 am	Legal Welcome & Introductions Speakers: Brie Allen, Esq. Chief Legal Officer NASBA Elizabeth Wolfe, Esq. Deputy Chief Legal Officer NASBA Alyssa Rayne, Esq. Counsel, Contracts and Regulatory Research NASBA	Salon H
11:45 am – 12:30 pm	TBD	
12:30 – 1:30 pm	Lunch (with Executive Directors & State Society CEOs)	Cannon + Belle
1:30 – 2:30 pm	Ethics: Why Good Lawyers Do Bad Things Speaker: Robert Prentice, Esq. Professor, McCombs School of Business Texas University at Austin	Salon H

Wednesday, March 25, 2026 continued

2:30 – 3:30 pm	Roll Call (Legal Counsel and Investigators/Enforcement Staff Only) Moderators: NASBA Legal Team	
3:30 – 3:45 pm	Break	Salon JK Foyer
3:45 – 4:45 pm	Mentorship/Roll Call continued Speaker: TBD	Salon H
4:45 pm	Recess (Dinner on Own)	

Thursday, March 26, 2025

7:45 – 9:00 am	Complimentary Headshots	Salon JK Foyer
8:00 – 9:00 am	Breakfast	Cannon + Belle

Legal General Session – Start in Legal Room

9:00 – 10:00 am	Understanding Accounting and Financial Statements for Attorneys Speaker: Mark Bradshaw, Esq. Professor, McCombs School of Business Texas University at Austin	Salon H
10:00 – 11:00 am	Legal Cases/Lessons Learned Speaker: TBD	
11:00 – 11:30 am	Break	Salon JK Foyer
11:30 am – 12:30 pm	Mentorship/Enforcement Tools or Roll Call continued Speaker: TBD	Salon H
12:30 – 1:30 pm	Lunch	Cannon + Belle
1:30 – 2:00 pm	Order Drafting Speaker: TBD	Salon H
2:00 – 3:00 pm	Investigations Speaker: TBD	
3:00 pm	Adjourn	
6:00 pm	Closing Celebration	Offsite