

NASBA REBOUND

115th Annual Meeting

MISSION DRIVEN - MEMBER FOCUSED

Agenda

SUNDAY, OCTOBER 30, 2022

3:00 - 5:00 p.m.	Registration	Coronado Foyer – 4th Floor Harbor Tower
4:00 - 5:30 p.m.	CPT Workshop Ethical Leadership: Influencing with Integrity Alfonzo Alexander President, NASBA CPT	Harbor GH – 2nd Floor Harbor Tower
6:00 - 8:00 p.m.	Welcome Reception	4th Floor Pool Deck

MONDAY, OCTOBER 31, 2022

7:45 - 8:45 a.m.	Breakfast (All Welcome)	Harbor Ballroom ABC – 2nd Floor Harbor Tower
9:00 - 9:20 a.m.	Call to Order and Introductions W. Michael Fritz, CPA 2021-2022 Chair, NASBA	Coronado Ballroom – 4th Floor Harbor Tower
9:20 - 9:30 a.m.	Welcome to California Michael Savoy, CPA President, California Board of Accountancy	
9:30 - 10:15 a.m.	CAQ's Bold Ambition and Talent Pipeline Initiatives Liz Barentzen, ESQ VP, Operations and Talent Initiatives, Center for Audit Quality	
10:15 - 10:30 a.m.	Report from NASBA Chair W. Michael Fritz, CPA 2021-2022 Chair, NASBA	
10:30 - 10:45 a.m.	BREAK	Coronado Foyer – 4th Floor Harbor Tower
10:45 - 11:00 a.m.	Report from AICPA Chair Anoop Mehta, CPA, CGMA 2022-2023 Chair, AICPA	Coronado Ballroom – 4th Floor Harbor Tower

MONDAY, OCTOBER 31, 2022 CONTINUED

11:00 a.m. - 12:00 p.m.	CPA Evolution and the CPA Exam - the Latest Progress for 2024 Colleen K. Conrad, CPA Executive Vice President and COO, NASBA Lori A. Kelly, CPA Lead Manager – Exam Content, AICPA	
12:00 - 1:45 p.m.	Luncheon with David Wasserman Harbor Ballroom ABC – 2nd Floor Harbor Tower Senior Election Analyst, <i>The Cook Political Report</i> with Amy Walter and NBC Contributor	
2:00 - 2:30 p.m.	UAA Update Conditional Credit and Topics on the Horizon Stephanie M. Saunders, CPA Secretary, NASBA	Coronado Ballroom – 4th Floor Harbor Tower
2:30 - 3:00 p.m.	A Look Back: How Accountancy Became a Leader in Professional Licensure and Regulation Daniel J. Dustin, CPA Vice President, State Board Relations, NASBA	
3:00 - 3:30 p.m.	Ethical Dilemmas Near and Far: Board Member Conflicts of Interest and Private Equity Ownership Update Frank Trainor, ESQ Staff Attorney, North Carolina State Board of CPA Examiners Stephen M. Langowski, CPA Regional Director, NASBA	
3:30 - 3:45 p.m.	Report from the NASBA Center for the Public Trust Alfonzo Alexander President, NASBA CPT	
3:45 - 5:00 p.m.	CPT Event	Coronado Foyer – 4th Floor Harbor Tower

TUESDAY, NOVEMBER 1, 2022

8:00 - 9:50 a.m.	Regional Breakfast Meetings Southeast Regional Breakfast Middle Atlantic Regional Breakfast Pacific Regional Breakfast Mountain Regional Breakfast Great Lakes Regional Breakfast Southwest Regional Breakfast Central Regional Breakfast Northeast Regional Breakfast	Torrey Hills AB - 3rd Floor Seaport Tower Bankers Hill - 3rd Floor Seaport Tower Ocean Beach - 3rd Floor Seaport Tower Promenade A - 3rd Floor Harbor Tower Promenade B - 3rd Floor Harbor Tower Iron Mountain - 33rd Floor Seaport Tower Kingston Peak - 33rd Floor Seaport Tower Kingston Peak - 33rd Floor Seaport Tower
2. 8:00 - 9:50 a.m.	Breakfast for Other Attendees	Marina Courtyard – 1st Floor Outside

TUESDAY, NOVEMBER 1, 2022 continued

10:00 - 11:15 a.m.	Annual Business Meeting Minutes of 114th Annual Business Meeting Stephanie M. Saunders, CPA, Secretary NASBA Awards Laurie J. Tish, CPA, Awards Committee Chair Lorraine P. Sachs, NASBA Executive Vice President Emerita Elections of NASBA Board Members A. Carlos Barrera, CPA, Nominating Committee Chair Bylaws Committee Report Jimmy E. Burkes, CPA, Bylaws Committee Chair Administration & Finance Committee Report Tyrone Dickerson, CPA, Treasurer Audit Committee Report Michael Schmitz, CPA, Audit Committee Chair Executive Directors Committee Report Kent A. Absec, Executive Directors Committee Chair	Coronado Ballroom – 4th Floor Harbor Tower
11:15 a.m. - 12:00 p.m.	The State of NASBA Report Ken L. Bishop President and CEO, NASBA	
12:00 - 12:15 p.m.	First Meeting of 2022-2023 NASBA Board of Directors	
12:15 - 1:15 p.m.	Luncheon	Harbor Ballroom ABC – 2nd Floor Harbor Tower
1:30 - 2:30 p.m.	Inaugural Presentations Thanks W. Michael Fritz, CPA 2021-2022 Chair, NASBA Inaugural Address Richard N. Reisig, CPA 2022-2023 Chair, NASBA	
2:30 - 3:15 p.m.	An Update on Diversity Initiatives Alfonzo Alexander Chief Ethics & Diversity Officer, NASBA	
3:15 - 4:00 p.m.	Pipeline Initiatives in Action Colleen K. Conrad, CPA Executive Vice President and COO, NASBA Marta Zaniewski Vice President, State Regulatory & Legislative Affairs, AICPA	
4:00 p.m.	RECESS	
6:00 p.m.	CELEBRATION	The Lane – Offsite Trolleys will depart from the lobby beginning at 5:45 p.m.

WEDNESDAY, NOVEMBER 2, 2022

8:00 - 9:00 a.m.	State Board Presidents' and Chairs' Breakfast Meeting Moderator: W. Michael Fritz, CPA 2021-2022 Chair, NASBA	Vista ABC – 32nd Floor Seaport Tower
8:00 - 9:00 a.m.	Executive Directors' and State Board Staff Breakfast Meeting Moderator: John E. Patterson, ESQ 2022-2023 Executive Directors Committee Chair, NASBA	City View AB – 32nd Floor Seaport Tower
8:00 - 9:00 a.m.	Breakfast (All Welcome)	Marina Courtyard – 1st Floor Outside
9:15 - 9:45 a.m.	The Latest Legal Cases Elizabeth Wolfe, ESQ Senior Regulatory Counsel, NASBA	Coronado Ballroom – 4th Floor Harbor Tower
9:45 - 10:15 a.m.	Advances in Audit Risk Mitigation Carl R. Mayes, Jr., CPA Associate Director – CPA Quality & Evolution, AICPA	
10:15 - 10:45 a.m.	Legislative Trends Affecting Boards of Accountancy John W. Johnson Director, Legislative and Governmental Affairs, NASBA	
10:45 - 11:00 a.m.	Report from the Examination Review Board Ruben Davila, CPA, CFF, ESQ Chair, CPA Examination Review Board	
11:00 - 11:10 a.m.	Questions for NASBA Leadership Richard N. Reisig, CPA, and Ken L. Bishop	
11:10 - 11:20 a.m.	Closing Remarks on 2022 Annual Meeting - Invitation to 2023 Annual Richard N. Reisig, CPA 2022-2023 Chair, NASBA	
11:20 - 11:35 a.m.	Daily Recap	
11:35 a.m.	ADJOURN	