

NASBA

NEW BEGINNINGS



116TH ANNUAL MEETING

“NEW BEGINNINGS”

AGENDA

(Updated 10/23/2023)

Sunday, October 29, 2023

3:00 - 5:00 p.m.	Registration	Broadway Foyer – 6 th Floor
4:00 - 5:30 p.m.	CPT Ethics Workshop	Astor Ballroom – 7 th Floor
6:00 - 8:00 p.m.	Welcome Reception	Westside Ballroom – 5 th Floor

Monday, October 30, 2023

7:45 - 8:45 a.m.	Breakfast	Westside Ballroom – 5 th Floor
9:00 - 10:30 a.m.	Opening Plenary Session	Broadway Ballroom – 6 th Floor
9:00 - 9:20 a.m.	Call to Order and Introductions Richard N. Reisig, CPA 2022-2023 Chair, NASBA	
9:20 - 9:30 a.m.	Welcome to New York Ann B. Cohen, CPA Chair, New York State Board for Public Accountancy	
9:30 - 10:15 a.m.	The Future of the Profession Barry C. Melancon, CPA, CGMA President & CEO, AICPA	
10:15 - 10:30 a.m.	A Year in Review: Report from NASBA Chair Richard N. Reisig, CPA 2022-2023 Chair, NASBA	
10:30 - 10:45 a.m.	BREAK	Broadway Pre-function – 6 th Floor

Monday, October 30, 2023, continued

10:45 - 11:00 a.m.	The Latest Developments from the AICPA: A Report from the AICPA Chair Okorie L Ramsey, CPA, CGMA, PMP, NACD.DC 2023-2024 Chair, AICPA	Broadway Ballroom – 6th Floor
11:00 a.m. - 12:00 p.m.	CPA Evolution & the CPA Exam: Implementation on the Horizon Colleen K. Conrad, CPA Executive Vice President and COO, NASBA Michael A. Decker Vice President – CPA Examination and Pipeline – Public Accounting, AICPA	
12:00 - 1:30 p.m.	Business Luncheon Keynote Presentation Paul Zikopoulos Future Trends Expert VP of Technology Group Skills Vitality & Enablement, IBM	Westside Ballroom – 5th Floor
1:45 – 4:15 p.m.	Afternoon Plenary Session	Broadway Ballroom – 6th Floor
1:45 – 2:45 p.m.	A Case Study in the Ethical Use of AI Today Danielle Supkis Cheek, CPA, CFE, CVA Vice President of Strategy and Industry Relations, MindBridge	
2:45 – 3:15 p.m.	The UAA – Peer Review Submissions to Boards of Accountancy Nicola Neilon, CPA Chair, NASBA Uniform Accountancy Act Committee Viki A. Windfeldt Executive Director, Nevada State Board of Accountancy	
3:15 – 3:30 p.m.	BREAK	Broadway Foyer – 6th Floor
3:30 – 4:00 p.m.	Furthering Pathways Discussions Daniel J. Dustin, CPA Vice President, State Board Relations, NASBA	Broadway Ballroom – 6th Floor
4:00 – 4:15 p.m.	Relying on the CPA Exam: A Report from the Examination Review Board Ruben Davila, CPA, CFF, ESQ. Chair, CPA Examination Review Board	
4:15 – 4:30 p.m.	Growth in Ethics and Diversity: A Report from the NASBA Center for the Public Trust Alfonzo Alexander, CPC President, NASBA CPT	
4:30 - 5:30 p.m.	CPT “Cuffed for a Cause” Fundraiser Event	Terrace – 9th Floor

Tuesday, October 31, 2023

8:00 - 9:50 a.m.	Regional Breakfast Meetings Middle Atlantic Regional Breakout Breakfast Mountain Regional Breakout Breakfast Central Regional Breakout Breakfast Great Lakes Regional Breakout Breakfast Northeast Regional Breakout Breakfast Pacific Regional Breakout Breakfast Southeast Regional Breakout Breakfast Southwest Regional Breakout Breakfast	Ziegfeld – 4 th Floor O’Neill – 4 th Floor Belasco – 5 th Floor Odets – 4 th Floor Broadhurst – 5 th Floor Julliard – 5 th Floor Edison – 5 th Floor Barrymore – 9 th Floor
8:00 - 9:50 a.m.	Breakfast for Other Attendees	Carnegie – 5 th Floor
10:00 am - 12:00 p.m.	Morning Plenary Session	Broadway Ballroom – 6 th Floor
10:00 - 11:15 a.m.	Annual Business Meeting Minutes of the 115 th Annual Meeting Nicola Neilon, CPA 2022-2023 Secretary, NASBA NASBA Awards A. Carlos Barrera, CPA Chair, NASBA Awards Committee Lorraine P. Sachs NASBA Executive Vice President Emerita Election of NASBA Board Members W. Michael Fritz, CPA Chair, NASBA Nominating Committee Administration & Finance Committee Report Maria E. Caldwell, CPA 2023-2024 Treasurer, NASBA Audit Committee Report Michael Schmitz, CPA, CGMA, MBA Chair, NASBA Audit Committee	
11:15 a.m. - 12:00 p.m.	The State of NASBA Ken L. Bishop President and CEO, NASBA	
12:00 - 12:15 p.m.	First Meeting of 2023-24 NASBA Board of Directors	Julliard Complex – 5 th Floor
12:00 - 1:00 p.m.	Attendee Luncheon	Westside Ballroom – 5 th Floor
1:00 - 4:00 p.m.	Afternoon Plenary Session	Broadway Ballroom – 6 th Floor

Tuesday, October 31, 2023, continued

1:15 - 2:15 p.m.	Inaugural Presentations Acknowledgements & Gratitude Richard N. Reisig, CPA 2022-2023 Chair, NASBA Inaugural Address Stephanie M. Saunders, CPA 2023-2024 Chair, NASBA	
2:15 - 2:45 p.m.	Diversifying the Accounting Talent Pipeline Liz Barentzen, ESQ. VP, Operations and Talent Initiatives, Center for Audit Quality	
2:45 - 3:00 p.m.	BREAK	Broadway Foyer - 6th Floor
3:00 - 3:30 p.m.	Addressing the CPA Talent Shortage Susan S. Coffey, CPA, CGMA CEO of Public Accounting, AICPA	Broadway Ballroom - 6th Floor
3:30 - 4:00 p.m.	Board Structure and Public Protection: What You Need to Know John W. Johnson Director, Legislative and Governmental Affairs, NASBA	
4:00 p.m.	RECESS	
6:30 p.m.	CELEBRATION	Broadway Ballroom - 6th Floor

Wednesday, November 1, 2023

8:00 - 9:15 a.m.	State Board President & Chair Breakfast Meeting Moderator: Stephanie M. Saunders, CPA 2023-2024 Chair, NASBA	Ziegfeld - 4th Floor
8:00 - 9:15 a.m.	Executive Director & State Board Staff Breakfast Meeting Moderator: D. Boyd Busby, CPA 2023-2024 Chair, NASBA Executive Directors Committee	Odets - 4th Floor
8:00 - 9:15 a.m.	Breakfast	Majestic Complex - 6th Floor
9:30 - 11:35 a.m.	Morning Plenary Session	Broadway Ballroom - 6th Floor
9:30 - 10:00 a.m.	The Latest Developments from the SEC Ryan Wolfe, CPA, CFA Chief Accountant - Division of Enforcement, U.S. Securities & Exchange Commission	

Wednesday, November 1, 2023, continued

- 10:00 - 10:45 a.m.** **NASBA Education Research Grant Recipients:
A Report on Their Findings**
Ryan Cahalan, JD, LL.M.
Assistant Professor of Accounting, Central Washington University
- Tristan B. Johnson, PH.D.**
Assistant Professor of Accounting, University of South Alabama
- 10:45 - 11:15 a.m.** **The Latest on NASBA Diversity Initiatives** **Broadway Ballroom – 6th Floor**
Alfonzo Alexander, CPC
Chief Ethics & Diversity Officer, NASBA
- Marie Zara**
Director of Advancement, The PhD Project
- 11:15 - 11:25 a.m.** **Questions for NASBA Leadership**
Stephanie M. Saunders, CPA
2023-2024 Chair, NASBA
- Ken L. Bishop**
President and CEO, NASBA
- 11:25 - 11:35 a.m.** **Closing Remarks on the 2023 Annual Meeting**
Stephanie M. Saunders, CPA
2023-2024 Chair, NASBA
- 11:35 - 11:45 a.m.** **Final Recap**
- 11:45 a.m.** **ADJOURN**