

# NASBA

MISSION DRIVEN - MEMBER FOCUSED

NASBA Annual Meeting  
Innovate, Collaborate, Succeed

## Sunday, October 27, 2024

7:30 a.m. – 1:30 p.m.	Golf Outing	
2:00 – 5:00 p.m.	Registration	Bonnet Creek Foyer
3:30 – 5:30 p.m.	CPT Ethics Workshop Ethics: Every Choice has a Consequence Chuck Gallagher, CSP Business Ethics Expert	Bonnet Creek VII-IX
6:00 – 8:00 p.m.	Welcome Reception	Waterside Patio & Green

## Monday, October 28, 2024

7:30 – 8:30 a.m.	Communications Breakfast	Orange
8:00 – 9:00 a.m.	Breakfast (All Welcome)	Bonnet Creek VII-IX
9:00 – 11:00 a.m.	<b>Opening Plenary Session</b>	Bonnet Creek I-VI
9:00 – 9:20 a.m.	Call to Order and Introductions Stephanie M. Saunders, CPA 2023-2024 Chair, NASBA	
9:20 – 9:30 a.m.	Welcome to Orlando Brent Sparkman, CPA Chair, Florida Board of Public Accountancy	
9:30 – 10:30 a.m.	Private Equity Investment in Public Accounting Firms Matthew Boshier, Esq. Hunton Andrews Kurth LLP	
10:30 – 10:45 a.m.	A Year in Review: Report from NASBA Chair Stephanie M. Saunders, CPA 2023-2024 Chair, NASBA	
10:45 – 11:00 a.m.	The Latest Developments from the AICPA: A Report from the AICPA Chair Carla McCall, CPA 2024-2025 Chair, AICPA	

## Monday, October 28, 2024

11:00 – 11:15 a.m.	<b>BREAK</b>	
11:15 a.m. – 12:30 p.m.	<b>The Hero Effect® - Being Your Best When It Matters the Most</b> Kevin Brown, Keynote Address	<b>Bonnet Creek I-VI</b>
12:30 – 1:30 p.m.	<b>Luncheon</b>	<b>Bonnet Creek VII-IX</b>
1:45 – 4:30 p.m.	<b>Afternoon Plenary Session</b>	<b>Bonnet Creek I-VI</b>
1:45 – 2:45 p.m.	<b>UAA &amp; Competency-Based Experience Pathway Update</b> Stephanie Saunders, CPA 2023-2024 Chair, NASBA  Nicola Neilon, CPA Chair, NASBA Uniform Accountancy Act Committee  Kent A. Absec Vice President, State Board Relations, NASBA	
2:45 – 3:00 p.m.	<b>BREAK</b>	
3:00 – 4:00 p.m.	<b>The Future of the Accounting Profession</b> Barry C. Melancon CPA, CGMA President & CEO, AICPA	<b>Bonnet Creek I-VI</b>
4:00 – 4:30 p.m.	<b>Growth in Ethics: A Report from the NASBA Center for the Public Trust</b> Sedrik Newbern President, NASBA Center for the Public Trust Chief Ethics Officer, NASBA	
4:30 – 5:30 p.m.	<b>CPT Fundraiser Event</b>	<b>Signature Island</b>

## Tuesday, October 29, 2024

7:30– 8:00 a.m.	<b>Great Lakes Regional Breakout Breakfast</b> <b>Central Regional Breakout Breakfast</b> <b>Southwest Regional Breakout Breakfast</b> <b>Mountain Regional Breakout Breakfast</b> <b>Pacific Regional Breakout Breakfast</b> <b>Southeast Regional Breakout Breakfast</b> <b>Middle Atlantic Regional Breakout Breakfast</b> <b>Northeast Regional Breakout Breakfast</b>	<b>Baker</b> <b>Bay</b> <b>Taylor</b> <b>Alachua</b> <b>Escambia</b> <b>Dixie</b> <b>Union</b> <b>Broward</b>
8:00 – 9:30 a.m.	<b>Regional Breakout Meetings</b>	<b>Same Rooms as Above</b>
8:00 – 9:30 a.m.	<b>Breakfast for Other Attendees</b>	<b>Bonnet Creek VII-IX</b>

9:40 am – 12:00 p.m.

**Morning Plenary Session**

Bonnet Creek I-VI

9:40 – 11:15 a.m.

**Annual Business Meeting**  
Minutes of the 116<sup>th</sup> Annual Meeting  
Nicola Neilon, CPA  
Secretary

NASBA Awards  
W. Michael Fritz, CPA  
Chair, NASBA Awards Committee

Election of NASBA Board Members  
Richard N. Reisig, CPA  
Chair, NASBA Nominating Committee

Bylaws Committee Report  
Jason D. Peery, CPA  
Bylaws Committee Chair

Administration & Finance Committee Report  
J. Andy Bonner, Jr., CPA, CGMA  
Treasurer

Audit Committee Report  
Laurie A. Warwick, CPA  
Chair, NASBA Audit Committee

11:15 a.m. – 12:00 p.m.

**The State of NASBA**  
Daniel J. Dustin, CPA  
President and CEO, NASBA

12:00 – 12:15 p.m.

**First Meeting of 2024-25 NASBA Board of Directors** Taylor

12:15 – 1:30 p.m.

**Luncheon** Bonnet Creek VII-IX

1:30 – 4:00 p.m.

**Afternoon Plenary Session**

Bonnet Creek I-VI

1:30 – 2:30 p.m.

**Inaugural Presentations**  
Acknowledgements & Gratitude  
Stephanie M. Saunders, CPA  
2023-2024 Chair, NASBA

Inaugural Address  
Maria E. Caldwell, CPA  
2024-2025 Chair, NASBA

## Tuesday, October 29, 2024 continued

2:30 – 3:00 p.m.	<b>Audit Talent and Artificial Intelligence</b> Christina Ho, CPA Member, PCAOB	
3:00 – 3:15 p.m.	<b>BREAK</b>	<b>Bonnet Creek Foyer</b>
3:15 – 3:45 p.m.	<b>The CPA Exam: A Report on Progress</b> Colleen K. Conrad, CPA Executive Vice President and COO, NASBA  Michael A. Decker Vice President – CPA Examination and Pipeline – Public Accounting, AICPA	<b>Bonnet Creek I-VI</b>
3:45 – 4:15 p.m.	<b>Experience Learn and Earn (ELE)</b> Kent A. Absec Vice President, State Board Relations, NASBA  Lindsey Yopp Lead Manager - CPA Pipeline, AICPA	
4:15 p.m.	<b>RECESS</b>	
6:30 p.m.	<b>NASBA Luau Extravaganza</b>	<b>Sea World's Discovery Cove</b>

## Wednesday, October 30, 2024

8:00 – 9:15 a.m.	<b>State Board President &amp; Chair Breakfast Meeting</b> Moderator: Maria E. Caldwell, CPA 2024-2025 Chair, NASBA	<b>Dade</b>
8:00 – 9:15 a.m.	<b>Executive Director &amp; State Board Staff Breakfast Meeting</b> Moderator: Nancy Glynn, CPA Executive Director, Virginia Board of Accountancy 2024-2025 Chair, NASBA Executive Directors Committee	<b>Dixie</b>
8:00 – 9:15 a.m.	<b>Breakfast (All Welcome)</b>	<b>Bonnet Creek VII-IX</b>
9:15 – 11:50 a.m.	<b>Morning Plenary Session</b>	<b>Bonnet Creek I-VI</b>
9:15 – 10:15 a.m.	<b>AI Revolution: Unlocking the Future of Tomorrow</b> Chuck Gallagher, CSP Business Ethics Expert, AI Keynote	

## Wednesday, October 30, 2024 continued

- 10:15 – 10:45 a.m.**                    **A Deeper Look: Texas Candidate Exam Performance by Large & Small Accounting Programs**  
**Charles R. Thomas, Jr., PhD, CMA, CGMA (inactive), CPA**  
Professor, Tarleton State University
- 10:45 – 11:15 a.m.**                    **Legislative Trends Affecting Boards of Accountancy: What You Need to Know**  
**John W. Johnson**  
Vice President, Legislative and Governmental Affairs, NASBA
- 11:15 – 11:30 a.m.**                    **Relying on the CPA Exam: A Report from the CPA Examination Review Board**  
**Faye D. Miller, CPA**  
Chair, CPA Examination Review Board
- 11:30 – 11:45 a.m.**                    **Questions for NASBA Leadership**  
**Maria E. Caldwell, CPA**  
2024-2025 Chair, NASBA  
**Daniel J. Dustin, CPA**  
President and CEO, NASBA
- 11:45 – 11:50 a.m.**                    **Closing Remarks on the 2024 Annual Meeting Invitation to 2025 Annual**  
**Maria E. Caldwell, CPA**  
2024-2025 Chair, NASBA
- 11:50 a.m. – 12:00 p.m.**                **Final Recap**
- 12:00 p.m.**                                **ADJOURN**