



# 42nd Annual Conference for Executive Directors & State Board Staff



NASHVILLE, TN | MARCH 25 – 27, 2024

MISSION DRIVEN - MEMBER FOCUSED

## AGENDA

### Monday, March 25, 2024

|                   |   |                       |
|-------------------|---|-----------------------|
| 9:00 am – 1:00 pm | <b>Executive Directors Committee Meeting<br/>(Committee Members Only)</b>     | <b>12 South 2</b>     |
|                   | <b>State Society Relations Committee Meeting<br/>(Committee Members Only)</b> | <b>12 South 1</b>     |
| 12:00 – 2:00 pm   | <b>Registration</b>   | <b>Broadway Foyer</b> |

### Opening Plenary Session

|                |  |                   |
|----------------|--|-------------------|
| 2:00 – 2:15 pm | <b>Welcome (with Legal Counsel &amp; State Society CEOs)</b><br>Presiding: <b>D. Boyd Busby, CPA</b><br>Chair, NASBA Executive Directors Committee<br>Executive Director, Alabama State Board of Public Accountancy  | <b>Broadway 1</b> |
| 2:15 – 3:00 pm | <b>NASBA Report from Leadership<br/>(with Legal Counsel &amp; State Society CEOs)</b><br>Speakers: <b>Stephanie M. Saunders, CPA</b><br>2023-2024 Chair, NASBA<br><b>Ken L. Bishop</b><br>President & CEO, NASBA   |                   |
| 3:00 – 4:00 pm | <b>Public Company Accounting Oversight Board (PCAOB)<br/>(with Legal Counsel &amp; State Society CEOs)</b><br>Speakers: <b>John Abell, CPA</b><br>Chief Accountant, Division of Enforcement and Investigations, PCAOB<br><b>William Ryan, Esq.</b><br>Chief Counsel, Division of Enforcement and Investigations, PCAOB |                   |
| 4:00 – 4:30 pm | <b>Legal Case Update (with Legal Counsel &amp; State Society CEOs)</b><br>Speaker: <b>Elizabeth Wolfe, Esq.</b><br>Senior Regulatory Counsel, NASBA  | <b>Broadway 1</b> |

## Monday, March 25, 2024 continued

**4:30 – 5:15 pm**      **Legislative Update (with Legal Counsel & State Society CEOs)**  
**Speaker:**      **John W. Johnson**  
Director, Legislative & Governmental Affairs, NASBA

**5:15 pm**              **Recess**

**6:30 pm**              **Welcome Reception**                              **Broadway 3**  
**(with Legal Counsel & State Society CEOs)**

## Tuesday, March 26, 2024

**7:15 – 8:30 am**      **Complimentary Headshots**                              **Broadway Foyer**

**7:30 – 8:30 am**      **Breakfast**    **Broadway 3**

### Plenary Session

**8:30 – 9:00 am**      **Use of Title & Principal Place of Business**                              **Broadway 1**  
**(with State Society CEOs)**

**Speakers:**      **Nancy Glynn, CPA**  
Executive Director, Virginia Board of Accountancy  
**J. Randel Hill, Esq.**  
General Counsel, Texas Board of Accountancy  
**Stephanie M. Saunders, CPA**  
2023-2024 Chair, NASBA

**9:00 – 9:45 am**      **Department of Labor (DOL)**  
**(with State Society CEOs)**  
**Speakers:**      **Marcus Aron, CPA**  
Chief, Division of Accounting Services  
Employee Benefits Security Administration  
**Michael Auerbach, CPA**  
Chief Accountant, Employee Benefits Security Administration

**9:45 – 10:45 am**      **Update from Professional Licensure Task Force**  
**(with State Society CEOs)**  
**Speakers:**      **Stephanie M. Saunders, CPA**  
2023-2024 Chair, NASBA  
**Daniel J. Dustin, CPA**  
Vice President, State Board Relations, NASBA  
**William Treacy**  
Executive Director, Texas State Board of Public Accountancy

**10:45 – 11:15 am**      **Break**

## Tuesday, March 26, 2024 continued

|                            |  |                      |
|----------------------------|--|----------------------|
| <b>11:15 – 11:45 am</b>    | <b>Peer Review Enforcement Related Issues (with State Society CEOs)</b><br><b>Speakers:</b> <b>Jennifer Winters, CPA</b><br>Executive Officer, New York State Board for Public Accountancy<br><br><b>Viki Windfeldt</b><br>Executive Director, Nevada State Board of Accountancy | <b>Broadway 1</b>    |
| <b>11:45 am – 12:30 pm</b> | <b>CPA Examination Update (with State Society CEOs)</b><br><b>Speakers:</b> <b>Colleen K. Conrad, CPA</b><br>Executive Vice President & COO, NASBA<br><br><b>Michael Decker</b><br>Vice President, CPA Examination and Pipeline – Public Accounting, AICPA                       |                      |
| <b>12:30 – 1:30 pm</b>     | <b>Lunch (with Legal Counsel &amp; State Society CEOs)</b>   | <b>Broadway 3</b>    |
| <b>1:45 – 4:30 pm</b>      | <b>NASBA Operations Tour (with State Society CEOs)</b>   | <b>NASBA Offices</b> |
| <b>4:30 pm</b>             | <b>Adjourn</b>   |                      |

## Wednesday, March 27, 2024

|                       |                                |                       |
|-----------------------|--------------------------------|-----------------------|
| <b>7:45 – 9:00 am</b> | <b>Complimentary Headshots</b> | <b>Broadway Foyer</b> |
| <b>8:00 – 9:00 am</b> | <b>Breakfast</b>               | <b>Broadway 3</b>     |

### Plenary Session

|                         |   |                   |
|-------------------------|---|-------------------|
| <b>9:00 – 9:30 am</b>   | <b>CPE Audit Services (with State Society CEOs)</b><br><b>Speakers:</b> <b>Amy Tongate, MBA</b><br>Associate Director, CPE Services and ALD, NASBA<br><br><b>Erin Scruggs, MBA</b><br>Senior Manager, CPE Audit Service and ALL, NASBA  | <b>Broadway 1</b> |
| <b>9:30 – 10:15 am</b>  | <b>Emerging Issues (with State Society CEOs)</b><br><b>Speakers:</b> <b>D. Boyd Busby, CPA</b><br>Chair, NASBA Executive Directors Committee<br>Executive Director, Alabama State Board of Public Accountancy<br><br><b>Ron Gitz, CPA, CGMA</b><br>Executive Director, CEO, Society of Louisiana CPAs |                   |
| <b>10:15 – 10:30 am</b> | <b>Break</b>  |                   |

## Wednesday, March 27, 2024 continued

|                     |   |  |
|---------------------|---|--|
| 10:30 – 11:00 am    | <b>IQEX and Mutual Recognition Agreements (with State Society CEOs)</b><br><b>Speakers:</b> <b>Kyle Barrier</b><br>Associate Director, International Evaluation Services, NASBA<br><b>William Treacy</b><br>Executive Director, Texas State Board of Public Accountancy   | <b>Broadway 1</b>  |
| 11:00 am – 12:30 pm | <b>Breakout Sessions (Closed Sessions)</b><br><b>Executive Directors (only)</b><br><b>Presiding:</b> <b>D. Boyd Busby, CPA</b><br>Chair, NASBA Executive Directors Committee<br>Executive Director, Alabama State Board of Public Accountancy<br><b>State Society CEOs (only)</b><br><b>Presiding:</b> <b>Ron Gitz, CPA, CGMA</b><br>Executive Director, CEO, Society of Louisiana CPAs<br><b>Board Staff (only)</b><br><b>Presiding:</b> <b>Tracey Fithen</b><br>Assistant Executive Director, Accountancy Board of Ohio | <b>Belle Meade</b><br><b>5 Points</b><br><b>12 South</b> |
| 12:30 – 1:30 pm     | <b>Lunch</b>  | <b>Broadway 3</b>  |
| 1:30 – 3:00 pm      | <b>Breakout Sessions (Closed Sessions)</b><br><b>Executive Directors (only)</b><br><b>Presiding:</b> <b>D. Boyd Busby, CPA</b><br>Chair, NASBA Executive Directors Committee<br>Executive Director, Alabama State Board of Public Accountancy<br><b>Board Staff (only)</b><br><b>Presiding:</b> <b>Tracey Fithen</b><br>Assistant Executive Director, Accountancy Board of Ohio   | <b>Belle Meade</b><br><b>12 South</b>                    |
| 3:00 – 4:00 pm      | <b>Executive Director Q&amp;A Session with NASBA Leadership (Closed Session)</b>  | <b>Belle Meade</b>                                       |
| 4:00 pm             | <b>Adjourn</b>  |  |
| 6:30 pm             | <b>Nashville Songwriter Night &amp; Honky-Tonk Closing Celebration</b>  | <b>Broadway 1</b>  |

## Thursday, March 28, 2024

|                    |  |                 |
|--------------------|--|-----------------|
| 9:00 am – 12:00 pm | <b>Executive Directors Committee Meeting</b> | <b>5 Points</b> |
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