

NASBA



CHICAGO, ILLINOIS | OCTOBER 26-29, 2025

118TH ANNUAL MEETING

Sunday, October 26, 2025

3:00 - 5:00 pm	Registration	CHICAGO BALLROOM FOYER (4 th)
3:30 - 5:30 pm	CPT Ethics Workshop Sedrik Newbern President, NASBA Center for the Public Trust Chief Ethics Officer, NASBA	MICHIGAN AB (2-FL)
6:00 - 8:00 pm	Welcome Reception & Dinner	CHICAGO 8-10 (4-FL)

Monday, October 27, 2025

7:50 - 8:50 am	Breakfast (All Welcome)	CHICAGO 8-10 (4-FL)
9:00 – 10:45 AM	OPENING PLENARY SESSION	CHICAGO 6 & 7 (4-FL)
9:00 - 9:20 am	Call to Order and Introductions Maria E. Caldwell, CPA 2024-2025 Chair, NASBA	
9:20 - 9:30 am	Welcome to Chicago	
9:30 - 10:30 am	Linking our Foundations to Our Future: The Power of Passion, Patience, and Partnership Derek Young - Keynote	
10:30 – 10:45 am	A Year in Review: Report from NASBA Chair Maria E. Caldwell, CPA 2024-2025 Chair, NASBA	
10:45 - 11:00 AM	BREAK	CHICAGO BALLROOM FOYER (4th)

11:00 - 11:15 am	<p>The Latest Developments from the AICPA: CHICAGO 6 & 7 (4-FL)</p> <p>A Report from the AICPA Chair</p> <p>Lexy Kessler, CPA, CGMA</p> <p>2025-2026 Chair, AICPA</p>	
11:15 am - 12: 15 pm	<p>The NASBA Diagnostic: Findings and Directions</p> <p>Brendan Tapley</p> <p>Consultant</p>	
12:30 - 1:30 PM	ATTENDEE LUNCHEON	CHICAGO 8-10 (4-FL)
1:40 – 4:45 PM	AFTERNOON PLENARY SESSION	CHICAGO 6 & 7 (4-FL)
1:40 - 2:40 pm	<p>Private Equity Task Force Panel</p> <p>Moderator: Wendy S. Garvin</p> <p>Executive Vice President, NASBA</p> <p>Dan Vuckovich, CPA-Retired</p> <p>Chair, NASBA Private Equity Task Force</p> <p>Dominic Franzella</p> <p>Executive Director, California Board of Accountancy</p> <p>Dale G. Mullen, JD, Esq.</p> <p>Member, Virginia Board of Accountancy</p>	
2:40 - 3:10 pm	<p>Legislative and Regulatory Update</p> <p>Katrina Salazar, CPA</p> <p>Chair, NASBA Legislative Support Committee</p> <p>John W. Johnson</p> <p>Vice President, Legislative and Government Affairs, NASBA</p>	
3:10 – 3:40 PM	BREAK	CHICAGO BALLROOM FOYER (4-FL)
3:40 - 4:10 pm	<p>CPE Statement on Standards</p> <p>Laurie A. Warwick, CPA</p> <p>Chair, NASBA CPE Committee</p>	
4:10 - 4:45 pm	<p>Growth in Ethics: A Report from the NASBA Center for the Public Trust</p> <p>Sedrik Newbern</p> <p>President, NASBA Center for the Public Trust</p> <p>Chief Ethics Officer, NASBA</p>	
4:45 - 5:45 pm	CPT Fundraiser Event	FOUNTAINVIEW (3-FL)

Tuesday, October 28, 2025

7:45 - 8:15 am	Great Lakes Regional Breakout Breakfast	TBD
	Central Regional Breakout Breakfast	TBD
	Southwest Regional Breakout Breakfast	TBD
	Mountain Regional Breakout Breakfast	TBD
	Pacific Regional Breakout Breakfast	TBD
	Southeast Regional Breakout Breakfast	TBD
	Middle Atlantic Regional Breakout Breakfast	TBD
	Northeast Regional Breakout Breakfast	TBD
8:15 - 9:45 am	Regional Breakout Meetings	SAME AS ABOVE
8:15 - 9:45 am	Breakfast for Other Attendees	CHICAGO 8-10 (4-FL)
10:00 AM – 1:15 PM	MORNING PLENARY SESSION	CHICAGO 6 & 7 (4-FL)
10:00 - 11:25 am	Annual Business Meeting Minutes of the 117th Annual Meeting Katrina Salazar, CPA Secretary NASBA Awards Richard N. Reisig, CPA Chair, NASBA Awards Committee Election of NASBA Board Members Stephanie M. Saunders, CPA Chair, NASBA Nominating Committee Bylaws Committee Report Jason D. Peery, CPA Chair, NASBA Bylaws Committee Administration & Finance Committee Report J. Andy Bonner, Jr., CPA, CGMA Treasurer Audit Committee Report Wilhelmus J. Schaffers, CPA Chair, NASBA Audit Committee	
11: 25 am - 12:00 pm	The State of NASBA Daniel J. Dustin, CPA President and CEO, NASBA	

12:00 - 12:30 pm	First Meeting of 2025-2026 NASBA Board of Directors	
12:15 - 1:15 PM	ATTENDEE LUNCHEON	CHICAGO 8-10 (4-FL)
1:30 - 4:45 PM	AFTERNOON PLENARY SESSION	CHICAGO 6 & 7 (4-FL)
1:30 - 2:30 pm	<p>Inaugural Presentations</p> <p>Acknowledgements & Gratitude</p> <p>Maria E. Caldwell, CPA</p> <p>2024-2025 Chair, NASBA</p> <p>Inaugural Address</p> <p>Nicola Neilon, CPA</p> <p>2025-2026 Chair, NASBA</p>	
2:30 - 3:15 pm	<p>Artificial Intelligence</p> <p>“The Proactive Steward: How State Boards Can Guide an AI-Enabled Profession”</p> <p>Markus Bernhardt, PhD</p>	
3:15 - 3:45 pm	<p>The CPA Exam: A Report on Progress</p> <p>William A. Emmer, CPA</p> <p>Chief Operations Officer, NASBA</p> <p>Michael A. Decker</p> <p>Vice President, CPA Examination and Pipeline-Public Accounting, AICPA</p>	
3:45 - 4:15 PM	BREAK	CHICAGO BALLROOM FOYER (4-FL)
4:15 - 4:45 pm	<p>Legal Update</p> <p>Brenner Allen, Esq.</p> <p>Chief Legal Officer, NASBA</p>	
4:45 pm	RECESS	
6:30 pm	Closing Celebration	

Wednesday, October 29, 2025

7:45 - 9:00 am	State Board President & Chair Breakfast Meeting Moderator: Nicola Neilon, CPA 2025-2026 Chair, NASBA	MAYFAIR (2-FL)
7:45 - 9:00 am	Executive Director & State Board Staff Breakfast Meeting Moderator: Martin Pittioni Executive Director, Oregon Board of Accountancy 2025-2026 Chair, NASBA Executive Directors Committee	FOUNTAINVIEW (3-FL)
8:00 - 9:00 am	Breakfast (All Welcome)	
9:15 – 11:45 AM	MORNING PLENARY SESSION	CHICAGO 6 & 7 (4-FL)
9:15 - 9:45 am	International Qualifications Appraisal Board (IQAB) Sharon A. Jensen, CPA Chair, IQAB	
9:45 - 10:45 am	NASBA Accounting Education Research Grant Recipients: A Report of Their Findings Kris Hoang, PhD, CPA, CA Professor, Culverhouse School of Accountancy – University of Alabama JT Thazhathel Assistant Clinical Professor, Accounting, LeBow College of Business – Drexel University	
10:45 – 11:15 am	UAA Update Kent A. Absec Vice President, State Board Relations, NASBA	
11:15 - 11:30 am	Relying on the CPA Exam: A Report from the CPA Examination Review Board Faye D. Miller, CPA Chair, CPA Examination Review Board	
11:30 - 11:40 am	Questions for NASBA Leadership Nicola Neilon, CPA 2025-2026 Chair, NASBA Daniel J. Dustin, CPA President and CEO, NASBA	

11:40 - 11:45 am	2025 Annual Meeting Closing Remarks Invitation to 2026 Annual Nicola Neilon, CPA 2025-2026 Chair, NASBA
11:45 am	Final Recap
12:00 pm	ADJOURN