

## 43rd Annual Conference for Executive Directors & Board Staff

### AGENDA

#### Tuesday, March 25, 2025

**11:00 am – 1:00 pm**      **Registration**      **Dunes Foyer**

#### Executive Director & Legal Counsel Workshop

**1:00 – 1:05 pm**      **Welcome & Introduction**      **Dunes I-III**  
(with Legal Counsel)  
**Presiding:** Nancy Glynn, CPA  
Chair, NASBA Executive Directors Committee  
Executive Director, Virginia Board of Accountancy

**1:05 – 1:45 pm**      **Securities and Exchange Commission (virtual)**  
**Speaker:** Ryan Wolfe  
Acting Chief Accountant, Office of the Chief Accountant  
U.S. Securities & Exchange Commission

**1:45 – 2:30 pm**      **Public Company Accounting Oversight Board**  
**Speakers:** Elliott Mogul, Esq.  
Attorney and Assistant Director,  
Division of Enforcement and Investigations, PCAOB  
Zack Springfield, CPA  
Assistant Director, Division of Enforcement  
and Investigations, PCAOB

**2:30 – 3:00 pm**      **Break**      **Dunes Foyer**

**3:00 – 3:30 pm**      **Internal Revenue Service (virtual)**  
**Speaker:** Keith Ott  
Director  
IRS Office of Professional Responsibility

## Tuesday, March 25, 2025 continued

3:30 – 4:00 pm	<b>Department of Education and Health &amp; Human Services</b> <b>Speakers:</b> <b>Amy Bales, CPA, CFE</b> Assistant Director, Non-Federal Audit Team Office of Inspector General, U. S. Department of Education <b>Mark Priebe</b> Director, Non-Federal Audit Team Office of Inspector General, U. S. Department of Education <b>Tammie Brown, CPA (virtual)</b> Director, Office of Inspector General, U.S. Department of Health and Human Services, Office of Audit Services, Single Audit Division	Dunes I-III
4:00 – 5:00 pm	<b>Alternative Practice Structure Firm Ownership Discussion</b> <b>Speakers:</b> <b>Wendy Garvin</b> Executive Vice President, NASBA <b>Brie Allen</b> Chief Legal Officer, NASBA <b>Kent Absec</b> Vice President, State Board Relations	
5:00 pm	<b>Adjourn</b>	
6:00 pm	<b>Welcome Reception</b> (with Legal Counsel and State Society CEOs)	East Pool Deck

## Wednesday, March 26, 2025

7:15 – 8:30 am	<b>Complimentary Headshots</b>	Dunes Foyer
7:30 – 8:30 am	<b>Breakfast</b>	Pelican/Heron & Sandpiper (3 <sup>rd</sup> Floor)
<b>Plenary Session</b>		
8:30 – 8:45 am	<b>Welcome</b> (with Legal Counsel and State Society CEOs) <b>Presiding:</b> <b>Nancy Glynn, CPA</b> Chair, NASBA Executive Directors Committee Executive Director, Virginia Board of Accountancy	Dunes I-III
8:45 – 9:30 am	<b>NASBA Report from Leadership</b> (with Legal Counsel and State Society CEOs) <b>Speakers:</b> <b>Maria Caldwell, CPA</b> 2024-2025 Chair, NASBA <b>Daniel J. Dustin, CPA</b> President & CEO, NASBA	

## Wednesday, March 26, 2025 continued

9:30 – 10:15 am	<b>Legal Update</b> (with Legal Counsel & State Society CEOs) <b>Speaker:</b> <a href="#">Elizabeth Wolfe, Esq.</a> Deputy Chief Legal Officer, NASBA  <a href="#">Alyssa Rayne, Esq.</a> Counsel, NASBA	Dunes I-III
10:15 – 10:45 am	<b>Enforcement Tools for Boards</b> (with Legal Counsel & State Society CEOs) <b>Speaker:</b> <a href="#">Amy Tongate</a> Director, Compliance Services, NASBA  <a href="#">Elizabeth Wolfe, Esq.</a> Deputy Chief Legal Officer, NASBA	
10:45 – 11:05 am	<b>Break</b> (Legal Counsel moves into separate session)	Dunes Foyer
11:05 – 11:50 am	<b>Navigating Relationships with Societies &amp; Legislators</b> <b>Speakers:</b> <a href="#">Roger Scarborough</a> Executive Director, Florida Board of Accountancy  <a href="#">Shelly Weir</a> President & CEO, Florida Institute of CPAs  <a href="#">Carla Ratchford</a> Executive Director, Illinois Board of Examiners  <a href="#">Geoffrey Brown, CAE</a> President & CEO, Illinois Society of CPAs  <a href="#">Martin Pittioni</a> Executive Director, Oregon Board of Accountancy  <a href="#">Sherri McPherson, IOM, CAE</a> President & CEO, Oregon Society of CPAs	Dunes I-III
11:50 am – 12:30 pm	<b>CPA Exam Update</b> (with State Society CEOs) <b>Speakers:</b> <a href="#">William Emmer, CPA</a> Chief Operating Officer, NASBA  <a href="#">Michael A. Decker</a> Vice President, CPA Examination and Pipeline-Public Accounting, AICPA	
12:30 – 1:30 pm	<b>Lunch</b> (with Legal Counsel & State Society CEOs)	Ocean Hai (Hotel Lobby)

## Wednesday, March 26, 2025 continued

1:30 – 2:15 pm	<b>NASBA Roles &amp; Responsibilities</b> <b>Speakers:</b> <b>Wendy Garvin</b> Executive Vice President, NASBA <b>William Emmer, CPA</b> Chief Operating Officer, NASBA <b>Kent Absec</b> Vice President, State Board Relations, NASBA <b>Sedrik Newbern</b> Chief Ethics Officer, NASBA President, NASBA Center for the Public Trust	Dunes I-III
2:15 – 2:45 pm	<b>UAA Update</b> (with State Society CEOs) <b>Speaker:</b> <b>Kent Absec</b> Vice President, State Board Relations, NASBA	
2:45 – 3:30 pm	<b>Legislative Update</b> (with State Society CEOs) <b>Speaker:</b> <b>John W. Johnson</b> Vice President, Legislative & Governmental Affairs, NASBA	
3:30 – 3:45 pm	<b>Break</b>	Dunes Foyer
3:45 – 4:30 pm	<b>PROC &amp; Peer Review</b> (with State Society CEOs) <b>Speakers:</b> <b>Viki Windfeldt</b> Executive Director Nevada State Board of Accountancy <b>Beth Thoresen</b> Director-Operations, Peer Review Program, AICPA	Dunes I-III
4:30 pm	<b>Adjourn (Dinner on Own)</b>	

## Thursday, March 27, 2025

7:45 – 9:00 am	<b>Complimentary Headshots</b>	Dunes Foyer
8:00 – 9:00 am	<b>Breakfast</b>	Pelican/Heron & Sandpiper (3 <sup>rd</sup> Floor)
<b>Plenary Session</b>		
9:15 – 10:15 am	<b>Delegating &amp; Work-life Balance</b> (with State Society CEOs) <b>Speaker:</b> <b>Becky Hammond, CPA, CISA, CITP, CGAP</b> Audit & Consulting Partner Carr, Riggs & Ingram	Dunes I-III

## Thursday, March 27, 2025 continued

10:15 – 10:45 am	<b>Mobility Enforcement</b> <b>Speaker:</b> Dominic Franzella Executive Director California Board of Accountancy	Dunes I-III
10:45 – 11:00 am	<b>Break</b>	Dunes Foyer
11:00 am – 12:30 pm	<b>Breakout Sessions (Closed Sessions)</b> <b>Executive Directors</b> <b>Presiding:</b> Nancy Glynn, CPA Chair, NASBA Executive Directors Committee Executive Director, Virginia Board of Accountancy  <b>State Society CEOs Q&amp;A Session with NASBA Leadership</b> <b>Presiding:</b> Ronald A. Gitz, CPA, CGMA Chair, NASBA State Society Relations Committee Executive Director, CEO, Society of Louisiana CPAs  <b>Board Staff</b> <b>Presiding:</b> Renai Reinholtz Deputy Director, Virginia Board of Accountancy	Dunes I-III          Heron (3 <sup>rd</sup> Floor)          Sandpiper (3 <sup>rd</sup> Floor)
12:30 – 1:30 pm	<b>Lunch</b>	Ocean Hai (Hotel Lobby)
1:30 – 3:00 pm	<b>Breakout Sessions (Closed Sessions)</b> <b>Executive Directors</b> <b>Presiding:</b> Nancy Glynn, CPA Chair, NASBA Executive Directors Committee Executive Director, Virginia Board of Accountancy  <b>Board Staff</b> <b>Presiding:</b> Renai Reinholtz Deputy Director, Virginia Board of Accountancy  <b>State Society CEOs</b> <b>Presiding:</b> Ronald A. Gitz, CPA, CGMA Chair, NASBA State Society Relations Committee Executive Director, CEO, Society of Louisiana CPAs	Dunes I-III          Sandpiper (3 <sup>rd</sup> Floor)          Heron (3 <sup>rd</sup> Floor)
3:00 – 4:00 pm	<b>Executive Director Q&amp;A Session with NASBA Leadership (Closed Session)</b>	Dunes I-III
4:00 pm	<b>Adjourn</b>	
6:00 pm	<b>Closing Celebration - Depart from the Hotel Lobby</b>	

Friday, March 28, 2025

9:00 am – 1:00 pm	Executive Directors Committee Meeting (Committee Members Only)	Ibis (3 <sup>rd</sup> Floor)
	State Society Relations Committee Meeting (Committee Members Only)	Osprey Boardroom (3 <sup>rd</sup> Floor)