



30th Annual Conference for Board of Accountancy Legal Counsel



INNOVATE | COLLABORATE | SUCCEED Clearwater Beach, FL | March 25 - 27, 2025

AGENDA

Tuesday, March 25, 2025

10:00 am – 12: 45 pm	New Board Counsel Orientation & Working Lunch	TBD
11:00 am – 1:00 pm	Registration for all other attendees	Dunes Foyer
Opening Plenary Session		
1:00pm	Welcome & Introduction (with Executive Directors) Presiding: Nancy Glynn, CPA Chair, NASBA Executive Directors Committee Executive Director, Virginia Board of Accountancy	Dunes I-III
1:05 – 1:30 pm	Securities & Exchange Commission (virtual) Speaker: Ryan Wolfe Acting Chief Accountant, Office of the Chief Accountant U.S. Securities & Exchange Commission	
1:30 – 2:00 pm	Department of Labor Speakers: Michael Auerbach, CPA Chief Accountant, Division of Accounting Services Employee Benefits Security Administration U. S. Department of Labor Speaker: Marcus Aron, CPA, CGMA Chief, Division of Accounting Services Employee Benefits Security Administration U. S. Department of Labor	
2:00 – 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	

Tuesday, March 25, 2025 continued

3:00– 3:30 pm	Internal Revenue Service (virtual) Speaker: Keith Ott Director IRS Office of Professional Responsibility	
3:30– 4:00 pm	Department of Education and Health & Human Services Speakers: Amy Bales, CPA, CFE Assistant Director, Non-Federal Audit Team Office of Inspector General, U. S. Department of Education Mark Priebe Director, Non-Federal Audit Team Office of Inspector General, U. S. Department of Education Tammie Brown, CPA Director, Office of Inspector General, U.S. Department of Health and Human Services, Office of Audit Services, Single Audit Division	
4:00 – 5:00 pm	Alternative Practice Structure Firm Ownership Discussion Speakers: Wendy Garvin Executive Vice President, NASBA Brie Allen Chief Legal Officer, NASBA Kent Absec Vice President, State Board Relations	
5:00 pm	Adjourn	
6:30 pm	Welcome Reception (with Executive Directors & State Society CEOs)	East Pool Deck

Wednesday, March 26, 2025

7:15 – 8:30 am	Complimentary Headshots	Dunes Foyer
7:30 – 8:30 am	Breakfast	Pelican/Heron
Plenary Session		
8:30 – 8:45 am	Welcome and NASBA Update (with Executive Directors and State Society CEOs) Presiding: Nancy Glynn, CPA Chair, NASBA Executive Directors Committee Executive Director, Virginia Board of Accountancy	Dunes I-III

Wednesday, March 26, 2025 continued

8:45 – 9:30 am	NASBA Report from Leadership (with Executive Directors and State Society CEOs) Speakers: Maria Caldwell, CPA 2024-2025 Chair, NASBA Daniel J. Dustin, CPA President & CEO, NASBA	
9:30 – 10:15 am	Legal Update (with Executive Directors & State Society CEOs) Speaker: Elizabeth Wolfe, Esq. Deputy Chief Legal Officer, NASBA Alyssa Rayne, Esq. Counsel, NASBA	Dunes I-III
10:15 – 10:45 am	Enforcement Tools for Boards (with Executive Directors & State Society CEOs) Speakers: Amy Tongate Director, Compliance Services, NASBA Elizabeth Wolfe, Esq. Deputy Chief Legal Officer, NASBA	Dunes I-III
10:45 – 11:15 am	Break (Legal Counsel moves into separate session)	Dunes Foyer

Legal General Session

11:15 am – 11:20 pm	Legal Welcome & Introductions Speakers: Elizabeth Wolfe, Esq. Deputy Chief Legal Officer, NASBA Brie Allen, Esq. Chief Legal Officer, NASBA Alyssa Rayne, Esq. Counsel, NASBA	
11:20 am – 12:30 pm	Beyond the Checklist Health and Human Services and Department of Education In-Depth Discussion featuring Peer Review v. Quality Control Review Speakers: Amy Bales, CPA, CFE Assistant Director, Non-Federal Audit Team Office of Inspector General, U. S. Department of Education Mark Priebe Director Non-Federal Audit Team Office of Inspector General U. S. Department of Education Tammie Brown, CPA Director, Office of Inspector General, U.S. Department of Health and Human Services, Office of Audit Services, Single Audit Division	

Wednesday, March 26, 2025 continued

12:30 – 1:30 pm	Lunch (with Executive Directors & State Society CEOs)	Ocean Hai
1:30 – 2:30 pm	Government Attorney Ethics: Who is the Client? Speaker: Mark R. Brengelman, JD, MA Attorney at Law, PLLC	
2:30 – 3:30 pm	Investigations In-Depth Speaker: Peter DelVecchia, CPA Investigator, Peter DelVecchia, CPA, PLLC	
3:30 – 3:45 pm	Break	
3:45 – 4:30 pm	Roll Call (Legal Counsel and Investigators/Enforcement Staff Only)	
4:30 pm	Adjourn (Dinner On Own)	

Thursday, March 27, 2025

7:45 – 9:00 am	Complimentary Headshots	Dunes Foyer
8:00 – 9:00 am	Breakfast	Pelican/Heron

Legal General Session

9:00 – 10:00 am	Roll Call (Legal Counsel & Investigators/Enforcement Staff Only)	Dunes IV-V
10:00 – 10:45 am	Defending a Licensee before the Board: A view from the Defense Bar Speaker: Mark R. Brengelman, JD, MA Attorney at Law, PLLC	
10:45 – 11:00 am	Break	
11:00 am – 12:00 pm	Legal Case Update in Depth: The End of Chevron and Cases Impacting Regulatory Boards Speaker: Mai Lin Petrine, Esq. Director of Legal and Regulatory Affairs Federation of State Massage Therapy Boards (FSMTB)	

Thursday, March 27, 2025 continued

12:00 – 12:30 pm	Insight from NASBA Leadership Speaker: Wendy Garvin Executive Vice President, NASBA William Emmer, CPA Chief Operating Officer, NASBA Kent Absec Vice President, State Board Relations, NASBA	
12:30 – 1:30 pm	Lunch	Ocean Hai
1:30 – 2:00 pm	Ask the Experts: Health and Human Services and Department of Education Q&A In-Depth Discussion featuring Peer Review v. Quality Control Review Speakers: Amy Bales, CPA, CFE Assistant Director, Non-Federal Audit Team Office of Inspector General, U. S. Department of Education Mark Priebe Director, Non-Federal Audit Team Office of Inspector General U. S. Department of Education Tammie Brown, CPA Director, Office of Inspector General, U.S. Department of Health and Human Services, Office of Audit Services, Single Audit Division	
2:00 – 2:45 pm	Administrative Law Judge Session Speaker: The Honorable Yolonda Y. Green Administrative Law Judge Florida Division of Administrative Hearings	
2:45 – 3:30 pm	Roll Call (Legal Counsel & Investigators/Enforcement Staff Only)	
6:30 pm	Closing Celebration	Offsite