

# NASBA

## 44th Annual Conference for Executive Directors & Board Staff

Austin, TX | March 24 - 26, 2026

### Draft Agenda

#### Tuesday, March 24, 2026

9:00 am – 12:30 pm	<b>New Executive Director and Board Counsel Orientation &amp; Working Lunch</b>	Salon JK
12:00 – 2:00 pm	<b>Registration for Executive Directors, Board Staff &amp; Legal</b>	Salon JK Foyer
<b>Executive Director &amp; Legal Counsel Workshop</b> Closed Session for Executive Directors, Board Staff & Legal		
2:00 – 2:05 pm	<b>Welcome &amp; Introduction</b> (with Legal Counsel) Presiding: <b>Martin Pittioni</b> Chair, NASBA Executive Directors Committee Executive Director, Oregon Board of Accountancy	Salon JK
2:05 – 2:45 pm	<b>Forensic Accounting/Former IRS Staff Session</b> Speaker: <b>Jonathan Schnatz, CPA, CFF</b> Principal Withum	
2:45 – 3:30 pm	<b>Understanding PEEC Exposure Draft</b> Speakers: <b>Jessica Luttrull</b> Director, Professional Standards & Research NASBA <b>Steven M. Platau, J.D., CPA</b> Professor University of Tampa	
3:30 – 3:45 pm	<b>Break</b>	Salon JK Foyer

## Tuesday, March 24, 2026 - continued

3:45– 4:30 pm	<b>ADA Testing Accommodations</b> <b>Speakers:</b> <b>Adam Herjeczki</b> Senior Manager, Test Accommodations/ADA Compliance NASBA <b>Elizabeth Wolfe, Esq.</b> Deputy Chief Legal Officer NASBA	Salon JK
4:30 – 5:15 pm	<b>Unauthorized Practice</b> <b>Speakers:</b> <b>Marissa Brooks</b> Director of Licensing/CPE/Peer Review Texas State Board of Public Accountancy <b>Jerry Hill, Esq.</b> General Counsel Texas State Board of Public Accountancy	Salon JK
5:15 pm	<b>Recess</b>	
6:00 pm	<b>Welcome Reception</b> (with Legal Counsel & State Society CEOs)	Salon H

## Wednesday, March 25, 2026

7:15 – 8:30 am	<b>Complimentary Headshots</b>	Salon JK Foyer
7:30 – 8:30 am	<b>Breakfast</b>	Cannon + Belle
<b>Plenary Session</b>		
8:30 – 8:45 am	<b>Welcome</b> (with Legal Counsel & State Society CEOs) <b>Presiding:</b> <b>Martin Pittioni</b> <b>Chair, NASBA Executive Directors Committee</b> <b>Executive Director, Oregon Board of Accountancy</b>	Salon JK
8:45 – 9:15 am	<b>NASBA Report from Leadership</b> (with Legal Counsel & State Society CEOs) <b>Speakers:</b> <b>Nicola Neilon, CPA</b> 2025-2026 NASBA Chair <b>Daniel J. Dustin, CPA</b> President & CEO NASBA	
9:15 – 9:45 am	<b>Legal Update</b> (with Legal Counsel & State Society CEOs) <b>Speaker:</b> <b>Brenner Allen, Esq.</b> Chief Legal Officer NASBA	

# Wednesday, March 25, 2026 - continued

9:45 – 10:15 am	<p>Legislative Update (with Legal Counsel &amp; State Society CEOs) <b>Speaker:</b> <a href="#">John Johnson</a> Vice President, Legislative and Governmental Affairs NASBA</p>	Salon JK
10:15 – 11:00 am	<p><b>Mobility/Principal Place of Business</b> (with Legal Counsel &amp; State Society CEOs) <b>Speakers:</b> <a href="#">Kent Absec</a> Vice President, State Board Relations NASBA <a href="#">Frank Trainor, Esq.</a> Staff Attorney North Carolina Board of CPA Examiners</p>	
11:00 – 11:30 am	<p><b>Break</b></p>	Salon JK Foyer
11:30 am – 12:00 pm	<p><b>AICPA Enforcement</b> (with Legal Counsel &amp; State Society CEOs) <b>Speaker:</b> <a href="#">Toni T. Lee – Andrews</a> Director – Professional Ethics Division AICPA</p>	Salon JK
12:00 – 12:30 pm	<p><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</p>	
12:30 – 1:30 pm	<p><b>Lunch</b> (with Legal Counsel &amp; State Society CEOs)</p>	Cannon + Belle
1:30 – 2:15 pm	<p><b>Peer Review with APS Focus</b> (with State Society CEOs) <b>Speaker:</b> <a href="#">Carl Mayes, CPA, CAE</a> Vice President, AICPA</p>	Salon JK

## Wednesday, March 25, 2026 - continued

<b>2:15 – 3:15 pm</b>	<b>Firm Registration and Oversight</b> (with State Society CEOs) <b>Moderator:</b> <b>Shelley Ostrem</b> Deputy Director, Oregon Board of Accountancy <b>Speakers:</b> <b>Frances McClintock</b> Associate Director, Peer Review AICPA <b>Bryan O’Neill. Esq.</b> The Derbes Law Firm, LLC <b>Sunshine S. Chow</b> Senior Advisor, Internal Revenue Service	
<b>3:15 – 3:30 pm</b>	<b>Profession Ready Initiative</b> (with State Society CEOs) <b>Speaker:</b> <b>Carl Mayes, CPA, CAE</b> Vice President, AICPA	<b>Salon JK</b>
<b>3:30 – 3:45 pm</b>	<b>Break</b>	<b>Salon JK Foyer</b>
<b>3:45 – 4:30 pm</b>	<b>Private Equity Task Force Updates</b> (with State Society CEOs) <b>Moderator:</b> <b>Roger Scarborough</b> Executive Director Florida Board of Accountancy as the Moderator <b>Speakers:</b> <b>Dominic Franzella</b> Executive Officer California Board of Accountancy <b>D. Boyd Busby</b> Executive Director Alabama State Board of Public Accountancy <b>David Nance</b> Executive Director North Carolina State Board of CPA Examiners	<b>Salon JK</b>
<b>4:30 – 4:45 pm</b>	<b>UAA Update</b> (with State Society CEOs) <b>Speaker:</b> <b>Ashley Plyushko</b> Executive Director Oklahoma Accountancy Board	
<b>4:45 pm</b>	<b>Recess (Dinner on Own)</b>	

## Thursday, March 26, 2026

7:45 – 9:00 am	Complimentary Headshots	Salon JK Foyer
8:00 – 9:00 am	Breakfast	Cannon + Belle
<b>Plenary Session</b>		
9:00 – 9:30 am	<b>Puerto Rico Audit Process and Timestamping</b> (with State Society CEOs) <b>Speakers:</b> <b>Elias Colon</b> Executive Director Puerto Rico Board of Accountancy  <b>Maria T. Laboy, CPA, CGMA</b> Deputy Executive Director Puerto Rico CPA Society	Salon JK
9:30 – 10:00 am	<b>Education Pathways and Committee Update</b> (with State Society CEOs) <b>Speaker:</b> <b>Kyle Barrier</b> Associate Director, Client Services NASBA	Salon JK
10:00 – 10:15 am	<b>CPE Task Force Update</b> (with State Society CEOs) <b>Speaker:</b> <b>Amy Tongate</b> Director, NASBA Compliance Services	
10:15 – 10:45 am	<b>ALD Update</b> (with State Society CEOs) <b>Moderator:</b> <b>Clint Blasengame</b> Manager, NASBA ALD  <b>Speakers:</b> <b>Viki Windfeldt</b> Executive Director Nevada State Board of Accountancy  <b>Dan Sweetwood</b> Executive Director Nebraska State Board of Public Accountancy	
10:45 – 11:00 am	<b>Use of Artificial Intelligence in Board Operations</b> (with State Society CEOs) <b>Speaker:</b> <b>TBD</b>	Salon JK
11:00 – 11:30 am	Break	Salon JK Foyer

## Thursday, March 26, 2026 - continued

11:30 am – 12:30 pm	<b>Breakout Sessions (Closed Sessions)</b> <b>Executive Directors</b> Presiding: <b>Martin Pittioni</b> Chair, NASBA Executive Directors Committee Executive Director, Oregon Board of Accountancy  <b>Board Staff</b> Presiding: <b>Shelley Ostrem</b> Deputy Director, Oregon Board of Accountancy	<b>Salon JK</b>     <b>Room 614</b>
12:30 – 1:30 pm	<b>Lunch</b>	<b>Cannon + Belle</b>
1:30 – 3:00 pm	<b>Breakout Sessions (Closed Sessions)</b> <b>Executive Directors</b> Presiding: <b>Martin Pittioni</b> Chair, NASBA Executive Directors Committee Executive Director, Oregon Board of Accountancy  <b>Board Staff</b> Presiding: <b>Shelley Ostrem</b> Deputy Director Oregon Board of Accountancy	<b>Salon JK</b>     <b>Room 614</b>
3:00 – 4:00 pm	<b>Executive Director Q&amp;A Session with NASBA Leadership (Closed Session)</b>	<b>Salon JK</b>
4:00 pm	<b>Adjourn</b>	
6:00 pm	<b>Closing Celebration</b>	<b>Offsite</b>

## Friday, March 27, 2026

9:00 am – 1:00 pm	<b>Executive Directors Committee Meeting (Committee Members Only)</b>	<b>Room 615A</b>
	<b>State Society Relations Committee Meeting (Committee Members Only)</b>	<b>Room 616B</b>