

Agenda

Tuesday, March 24, 2026

9:00 am – 12:30 pm	New Executive Director and Board Counsel Orientation & Working Lunch Presiding: Dale Atkinson, Esq. Founding Partner & Attorney The Atkinson Firm Moderators: NASBA Legal Team	Salon FG
12:00 – 2:00 pm	Registration for Executive Directors, Board Staff & Legal	Salon J Foyer
	Executive Director & Legal Counsel Workshop Closed Session for Executive Directors, Board Staff & Legal	
2:00 – 2:05 pm	Welcome & Introduction (with Legal Counsel) Presiding: Martin Pittioni Chair, NASBA Executive Directors Committee Executive Director, Oregon Board of Accountancy	Salon JK
2:05 – 2:45 pm	The CPA's Role in IRS Investigations Speaker: Jonathan Schnatz, CPA, CFF Principal Withum Smith + Brown	
2:45 – 3:30 pm	Understanding PEEC Exposure Draft Speakers: Jessica Luttrull, CPA Director, Professional Standards & Research NASBA Steven M. Platau, J.D., CPA Professor University of Tampa	
3:30 – 3:45 pm	Break	Salon J Foyer

Tuesday, March 24, 2026 - continued

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

Wednesday, March 25, 2026

7:15 – 8:30 am	Complimentary Headshots	Salon J Foyer
7:30 – 8:30 am	Breakfast	Salon H

Plenary Session

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

Wednesday, March 25, 2026 - continued

9:45 – 10:15 am	Legislative Update (with Legal Counsel & State Society CEOs) Speaker: John W. Johnson Vice President, Legislative and Governmental Affairs NASBA	Salon JK
10:15 – 11:00 am	Mobility/Principal Place of Business (with Legal Counsel & State Society CEOs) Speakers: Kent Absec Vice President, State Board Relations NASBA Frank Trainor, Esq. Staff Attorney North Carolina Board of CPA Examiners	
11:00 – 11:30 am	Break	Salon J Foyer
11:30 am – 12:00 pm	AICPA Enforcement (with Legal Counsel & State Society CEOs) Speaker: Toni T. Lee-Andrews, CPA, PFS, CGMA Senior Technical Director - Ethics & Peer Review AICPA	Salon JK
12:00 – 12:30 pm	CPA Exam Update (with Legal Counsel & State Society CEOs) Speakers: William Emmer, CPA Chief Operating Officer, NASBA Michael A. Decker Vice President, CPA Examination and Pipeline-Public Accounting, AICPA	
12:30 – 1:30 pm	Lunch (with Legal Counsel & State Society CEOs)	Salon H
1:30 – 2:15 pm	Peer Review with APS Focus (with State Society CEOs) Speaker: Carl Mayes, CPA, CAE Vice President, CPA Candidate Quality & Competency AICPA	Salon JK

Wednesday, March 25, 2026 - continued

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

Thursday, March 26, 2026

7:45 – 9:00 am Complimentary Headshots Salon J Foyer

8:00 – 9:00 am Breakfast Salon H

Plenary Session

9:00 – 9:30 am Puerto Rico Audit Process and Timestamping (with State Society CEOs) Salon JK

Speakers: [Elias Colon](#)

Executive Director

Puerto Rico Board of Accountancy

[Maria T. Laboy, CPA, CGMA](#)

Deputy Executive Director, Member Services & Administrations

Puerto Rico Society of CPAs

9:30 – 10:00 am Education Pathways and Committee Update (with State Society CEOs) Salon JK

Speaker: [Kyle Barrier](#)

Associate Director, Client Services

NASBA

10:00 – 10:15 am CPE Task Force Update (with State Society CEOs)

Speaker: [Amy Tongate](#)

Director, Compliance Services

NASBA

10:15 – 10:45 am ALD Update (with State Society CEOs)

Moderator: [Clint Blasengame](#)

Manager, ALD

NASBA

Speakers: [Viki A. Windfeldt](#)

Executive Director

Nevada State Board of Accountancy

[Dan Sweetwood](#)

Executive Director

Nebraska State Board of Public Accountancy

10:45 – 11:00 am Use of Artificial Intelligence in Board Operations (with State Society CEOs) Salon JK

Speakers: [Lisa Benefield](#)

Executive Director

State Board of CPAs of Louisiana

[Caren Singleton](#)

Deputy Director

State Board of CPAs of Louisiana

Thursday, March 26, 2026 - continued

11:00 – 11:30 am	Break	Salon J Foyer
11:30 am – 12:30 pm	Breakout Sessions (Closed Sessions) Executive Directors Presiding: Martin Pittioni Chair, NASBA Executive Directors Committee Executive Director, Oregon Board of Accountancy	Room 616AB
	Board Staff Presiding: Shelley Ostrem Deputy Director Oregon Board of Accountancy	Room 615AB
12:30 – 1:30 pm	Lunch	Salon H
1:30 – 3:00 pm	Breakout Sessions (Closed Sessions) Executive Directors Presiding: Martin Pittioni Chair, NASBA Executive Directors Committee Executive Director, Oregon Board of Accountancy	Room 616AB
	Board Staff Presiding: Shelley Ostrem Deputy Director Oregon Board of Accountancy	Room 615AB
3:00 – 4:00 pm	Executive Director Q&A Session with NASBA Leadership (Closed Session)	Room 616AB
4:00 pm	Adjourn	
6:30 pm	Closing Celebration Depart from hotel lobby near Starbucks	800 Congress

Friday, March 27, 2026

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