

# NASBA

## 2026 NATIONAL REGISTRY SUMMIT

Sept. 22 – 23, 2026 | Nashville, TN

# REVISING THE STANDARDS



A Remastered  
Sound for CPE





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NASBA operates the National Registry of CPE Sponsors and in that capacity evaluates CPE providers compliance with the Statement on Standards for Continuing Professional Education (CPE) Programs that are published jointly by NASBA and the AICPA when they apply to be on the National Registry and on an ongoing basis once approved. As such, NASBA cannot issue certificates of attendance to award specific CPE credits.

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# Navigating the Electronic Binder

## Jump to bookmarked pages

Bookmarks provide a table of contents and usually represent the chapters and sections in a document. Bookmarks appear in the navigation pane.

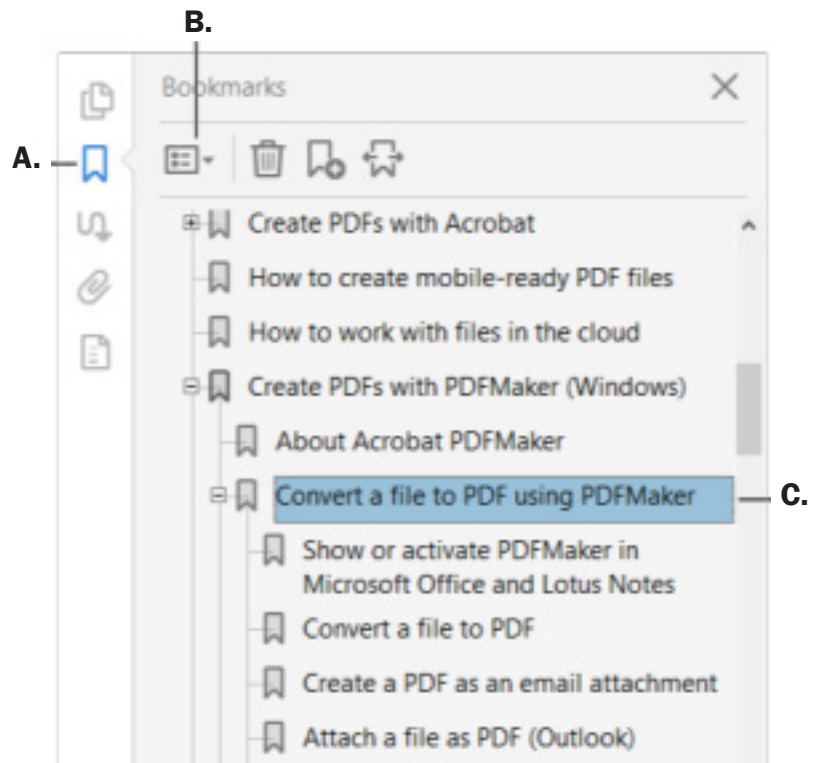
**Click the Bookmarks button, or choose View > Show/Hide > Navigation Panes > Bookmarks.**

**To jump to a topic, click the bookmark. Expand or collapse bookmark contents, as needed.**

Note:

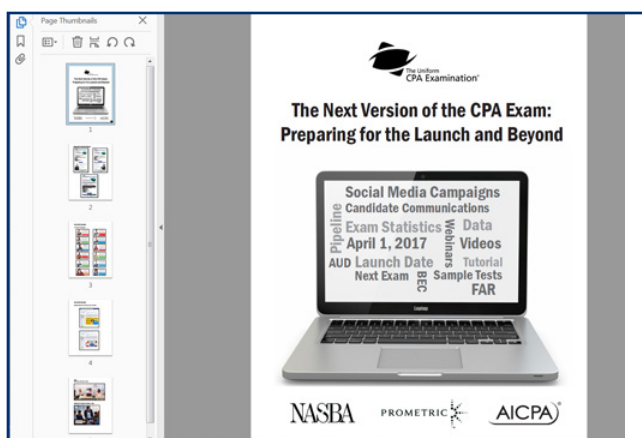
Depending on how the bookmark was defined, clicking it may not take you to that location but perform some other action instead.

If the list of bookmarks disappears when you click a bookmark, click the Bookmarks button to display the list again. If you want to hide the Bookmarks button after you click a bookmark, select Hide After Use from the options menu.



*Bookmarks panel*

**A.** Bookmarks button **B.** Click to display bookmark options menu **C.** Expanded bookmark



## Use page thumbnails to jump to specific pages

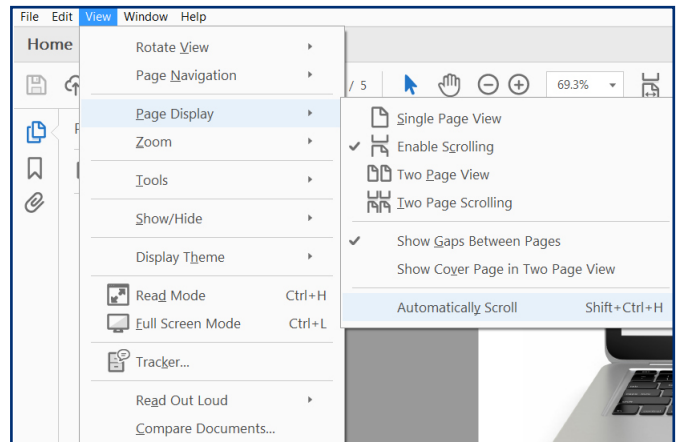
Page thumbnails provide miniature previews of document pages. You can use thumbnails in the Page Thumbnails panel to change the display of pages and to go to other pages. The red page-view box in the page thumbnail indicates which area of the page appears. You can resize this box to change the zoom percentage.

- 1. Click the Page Thumbnails button or choose View > Show/Hide > Navigation Panes > Page Thumbnails to display the Page Thumbnails panel.**
- 2. To jump to another page, click its thumbnail.**

# Navigating the Electronic Binder

## Automatically scroll through a document

Automatic scrolling advances your view of the PDF at a steady rate, moving vertically down the document. If you interrupt the process by using the scroll bars to move back or forward to another page or position, automatic scrolling continues from that point forward. At the end of the PDF, automatic scrolling stops and does not begin again until you choose automatic scrolling again.



1. **Choose View > Page Display > Automatically Scroll.**
2. **Press Esc to stop scrolling.**

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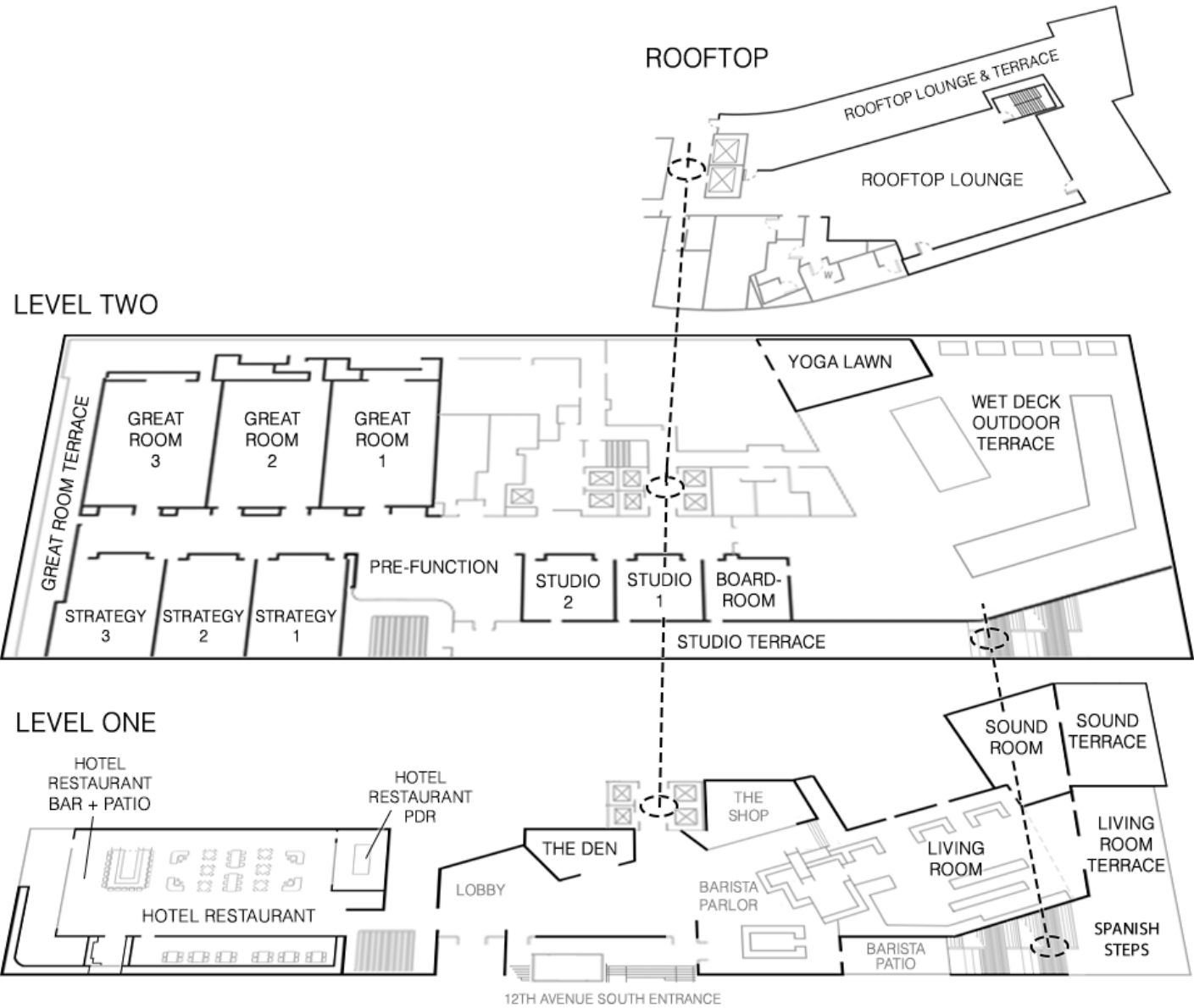
## Retrace your viewing path

You can find PDF pages that you viewed earlier by retracing your viewing path. It's helpful to understand the difference between previous and next pages and previous and next views. In the case of pages, previous and next refer to the two adjacent pages, before and after the currently active page. In the case of views, previous and next refer to your viewing history. For example, if you jump forward and backward in a document, your viewing history retraces those steps, showing you the pages you viewed in the reverse order that you viewed them.

1. **Choose View > Page Navigation > Previous View.**
2. **To continue seeing another part of your path, do either of the following:**
  - **Repeat step 1.**
  - **Choose View > Page Navigation > Next View.**

Note:

You can make the Previous View button and Next View button available in the toolbar area by right-clicking the Page Navigation toolbar and choosing them on the context menu, or choosing Show All Tools.



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**2026 National Registry Summit**  
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## 2026 National Registry Summit

Nashville, TN - September 22 - 23, 2026

### AGENDA

#### Monday, September 21, 2026

|                   |              |                  |
|-------------------|--------------|------------------|
| 3:00 pm - 4:00 pm | Registration | Great Room Foyer |
|-------------------|--------------|------------------|

#### Tuesday, September 22, 2026

|                   |           |             |
|-------------------|-----------|-------------|
| 7:00 am - 8:30 am | Breakfast | Living Room |
|-------------------|-----------|-------------|

|                   |                               |                  |
|-------------------|-------------------------------|------------------|
| 7:00 am - 8:30 am | Registration & Exhibitor Time | Great Room Foyer |
|-------------------|-------------------------------|------------------|

|                   |                                                                                                                         |            |
|-------------------|-------------------------------------------------------------------------------------------------------------------------|------------|
| 8:30 am - 9:00 am | Kick-Off and Welcome<br>Sedrik Newbern, President - NASBA Center for the Public Trust &<br>Chief Ethics Officer - NASBA | Great Room |
|-------------------|-------------------------------------------------------------------------------------------------------------------------|------------|

|                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |            |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| 9:00 am - 10:00 am | Reconnect<br>Carlos Whittaker, Author, Speaker and Storyteller<br>Better Humans, Better Teams, Better Results: A Blueprint for Thriving Teams and Resilient Leaders. What if the secret to high-performing teams and resilient leaders wasn't working harder—but working humaner? In a world overwhelmed by burnout, distractions, and disconnection, Carlos delivers a game-changing message: More connected, kinder people aren't just better humans—they're better employees, teammates, and leaders. Through riveting stories and actionable strategies drawn from his seven-week screen-free journey with Benedictine monks and an Amish community, Carlos equips organizations with the tools to transform their culture from the inside out. He teaches how self-leadership—leading yourself with clarity and intention—creates a foundation for leading others with empathy, trust, and purpose. In this keynote, Carlos shows your team how to: <ul style="list-style-type: none"><li>• Foster true collaboration by prioritizing relationships over reactions.</li><li>• Cultivate self-leadership to make better decisions, model resilience, and inspire others.</li><li>• Leverage kindness and humanity as the ultimate performance drivers, building a culture where everyone can thrive.</li><li>• Move from busyness to intentional progress, reclaiming focus and purpose in every interaction.</li></ul> Carlos's philosophy—BE human, SEE humans, FREE humans—is a practical roadmap for bridging divides, fostering connection, and unlocking the full potential of your team. Attendees will leave energized and equipped to lead with empathy, collaborate with curiosity, and build a workplace culture that delivers both results and fulfillment. | Great Room |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|



## 2026 National Registry Summit Nashville, TN - September 22 - 23, 2026

### AGENDA

Because when people are seen, heard, and empowered, they don't just show up—they actually soar.

|                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                  |
|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| 10:00 am - 10:30 am | NASBA Updates<br>Bill Emmer, Chief Operating Officer - NASBA<br>Amy Tongate, Director, Compliance Services - NASBA                                                                                                                                                                                                                                                                                                                                                                                                                       | Great Room       |
| 10:30 am - 10:50 am | BREAK & EXHIBITOR TIME                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Great Room Foyer |
| 10:50 am - 12:00 pm | Compliance Karaoke: Completing the Lyrics of the Standards<br>Thaddeaus Douglas, National Registry Account Manager - NASBA<br>Madison Word, National Registry Account Manager - NASBA<br>Participant engagement and completion verification are key components of the 2026 Standards for Group Live and Group Internet-Based programs. This session will examine compliance requirements, practical implementation approaches, common considerations for sponsors, and the role of artificial intelligence within the updated Standards. | Great Room       |
| 12:00 pm - 1:00 pm  | LUNCH                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Living Room      |
| 1:00 pm - 1:45 pm   | CPE Rules from a Legal Perspective<br>Elizabeth Wolfe, Deputy Chief Legal Counsel - NASBA                                                                                                                                                                                                                                                                                                                                                                                                                                                | Great Room       |
| 1:45 pm - 2:45 PM   | Skills in Motion: How AI and Emerging Tech Are Redefining Professional Development and CPE<br>Erika Bialek                                                                                                                                                                                                                                                                                                                                                                                                                               | Great Room       |
| 2:45 pm - 3:00 pm   | Instructions for Breakout Sessions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Great Room       |
| 3:00 pm - 3:20 pm   | BREAK & EXHIBITOR TIME                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Great Room Foyer |

#### Breakouts

##### Breakout 1

|                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |            |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| 3:20 pm - 4:30 pm | QAS™ Self Study, Nano Learning & Blended Learning: The Classics & New Releases of the 2026 Standards<br>Thaddeaus Douglas, National Registry Account Manager - NASBA<br>Erin Scruggs, Associate Director, National Registry - NASBA<br>Explore the 2026 Standards updates affecting Self Study and Blended Learning programs. This session will review learning objectives, key program requirements, and significant changes from the 2024 Standards, helping sponsors understand how to prepare for implementation and maintain compliance. | Strategy 3 |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|



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### AGENDA

#### Breakout 2

3:20 pm - 4:30 pm

In Tune with the Standards: An Audit Deep Dive  
Megan Mason, Compliance Auditor, National Registry - NASBA  
Karen Mourcy, Compliance Auditor, National Registry - NASBA  
Learn what to expect during a NASBA Registry audit and how to successfully navigate the process. Attendees will explore auditor focus areas, best practices for demonstrating compliance with CPE Standards, and common issues identified during audits.

Strategy 1

#### Breakout 3

3:20 pm - 4:30 pm

The Standards Soundtrack: What Sponsors Need to Know  
Rich Easter, Registry Senior Manager - NASBA  
Madison Word, National Registry Account Manager - NASBA  
Provides sponsors with practical guidance on administrative processes, renewals, transitions to the 2026 Standards, and key compliance requirements. It highlights major changes introduced in the 2026 Standards, including participant engagement, completion verification, technology-assisted instruction, adaptive learning flexibility, and revised credit awarding practices. The presentation also focuses on the real-world impact of these changes for NASBA sponsors, helping them understand what actions are needed to achieve and maintain compliance under the new framework.

Great Room

4:30 pm - 5:00 pm

Exhibitor Time

Great Room Foyer

5:00 pm - 7:00 pm

Connections and Cocktails  
Join the NASBA, National Registry Staff and fellow Sponsors for a networking opportunity.

Butterfly

#### Wednesday, September 23, 2026

7:30 am - 9:00 am

Breakfast & Exhibitor Time

Living Room

9:00 am - 9:15 am

Kick-Off and Welcome  
Sedrik Newbern, President - NASBA Center for the Public Trust & Chief Ethic Officer - NASBA

Great Room

9:15 am - 10:45 am

Evolve: Redefining Work in the Age of Agentic AI  
Jay Kiew, Innovation Strategist  
ChatGPT 5.4. Claude CoWork. OpenClaw. By the time our conference comes around, these tools will have evolved beyond what we see today. Agentic AI capability has accelerated in the last 6 months like never before, yet the world continues to struggle with integrating AI meaningfully in our workflows. According to one study by MIT (Aug '25), 95% of organizations are failing to see any return on investment, while the remaining 5% are exploding

Great Room



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in productivity, shareholder returns, and employee satisfaction. Which group do we fall into? Do we have a personal strategy to evolve how we work? In this 60-minute keynote, bestselling author and innovation strategist Jay Kiew will share how trailblazing individuals and organizations are driving innovation and growth - and unpack the Agentic AI playbook that will help you stop experimenting with AI and start working with it.

The transformation that participants experience:

- Identify exactly where AI is creating and destroying value in your world.
- Pinpoint blind spots and strategize to turn them into a 10x productivity advantage
- Come away with a Change Fluency™ roadmap to build your own personal Agentic AI strategy at work come Monday.

|                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                  |
|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| 10:45 am - 11:05 am | BREAK & EXHIBITOR TIME                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Great Room Foyer |
| 11:05 am - 11:45 am | <p>The Steady Beat of Sponsor Best Practices<br/>Moderator: Erin Scruggs (National Registry of CPE Sponsors, NASBA)<br/>Panelists: Aarin Maevry (Association of Certified Fraud Examiners), Linda Newsom-McCurdy (Virginia Society of CPAs), Chris Rivera (My-CPE LLC), Rita Seghal (EY)</p> <p>Hear directly from National Registry sponsors as they share practical strategies, lessons learned, and approaches that support strong, high-quality CPE programs. This moderated discussion will explore participant engagement, attendance and completion verification, operational challenges, audit readiness, and how sponsors are preparing for the transition to the 2026 Standards.</p> | Great Room       |
| 11:45 am - 12:00 pm | <p>Q&amp;A Session with Registry Leadership<br/>Rich Easter, Registry Senior Manager - NASBA<br/>Erin Scruggs, Associate Director, Compliance Services - NASBA<br/>Amy Tongate, Director, Compliance Services - NASBA</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Great Room       |
| 12:00 pm            | Closing Remarks                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Great Room       |

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## Registration by Attendee Last Name

| Last Name    | First Name | Organization                                                           |
|--------------|------------|------------------------------------------------------------------------|
| Abrams       | Jessee     | LumiQ                                                                  |
| Adventure    | Elizabeth  | Western CPE                                                            |
| Arena        | Jenny      | Deloitte                                                               |
| Arra         | Amy        | PowerPlan, Inc.                                                        |
| Asinger      | Emily      | Educe (Calculo)                                                        |
| Atchley      | Lauren     | Abdo, LLP                                                              |
| Baker        | Ashlee     | HFMA                                                                   |
| Bartenfelder | Erin       | Weaver and Tidwell, L.L.P.                                             |
| Beeler       | Susan      | Office of the Missouri State Auditor                                   |
| Benham       | Katie      | Frazier & Deeter                                                       |
| Benjamin     | Janet      | Surgent                                                                |
| Bialek       | Erika      | EisnerAmper                                                            |
| Bilodeau     | Sean       | 20-20 Services                                                         |
| Blattenbauer | Carla      | Allinial Global                                                        |
| Blevins      | Cheri      | Brown Edwards                                                          |
| Boddie       | Stephanie  | DOJ - Bureau of ATF                                                    |
| Boone        | Kasey      | BDO USA                                                                |
| Boudreau     | Meghan     | Dean Dorton                                                            |
| Briggs       | Kaitlin    | CPA.com                                                                |
| Bruck        | Linda      | Vertex Inc.                                                            |
| Burns        | Heather    | Carr, Riggs & Ingram                                                   |
| Carey        | Bryan      | RSM US LLP                                                             |
| Chakinala    | Sangeetha  | Oppenheimer & Co. Inc                                                  |
| Chang        | Winnie     | HCVT                                                                   |
| Chelius      | Samantha   | RKL LLP                                                                |
| Chojnacki    | Laura      | IMA                                                                    |
| Clayton      | Cristina   | Amplifire                                                              |
| Collins      | Barry      | Management Concepts                                                    |
| Counts       | Ashley     | CeriFi (CPEdge, Fast Forward Academy, Gear Up, and Spidell Publishing) |
| Crabb        | Olivia     | LCvista                                                                |
| Curcuru      | Kristin    | Becker                                                                 |
| Cykala       | Lori       | Rice University                                                        |
| Daniel       | Emily      | LeadingAge                                                             |
| Davenport    | Katie      | Forvis Mazars                                                          |
| Davies       | Sarah      | Caseware International                                                 |
| DiGuiseppe   | Annette    | PKF O'Connor Davies                                                    |
| Doyle        | Danielle   | TaxSpeaker                                                             |
| Dryden       | Bonnie     | Becker Professional Education                                          |



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## Registration by Attendee Last Name

|             |            |                                                         |
|-------------|------------|---------------------------------------------------------|
| Dulhanty    | Sarah      | Wipfli Advisory LLC                                     |
| Edmundson   | Sharon     | NC League of Municipalities                             |
| Estes       | Eileen     | Deloitte                                                |
| Farnsworth  | Minh       | Board of Gov of the Federal Reserve System              |
| Fiore       | Danielle   | Frank, Rimerman + Co. LLP                               |
| Fogelsonger | Kathleen   | ISACA                                                   |
| Fontanella  | Kate       | Kahn, Litwin, Renza                                     |
| Ford        | Brooke     | Capital One                                             |
| Fox         | Emily      | Avantax, a Cetera Company                               |
| Freeman     | Jacqueline | Blue & Co., LLC                                         |
| Galasso     | Frank      | Galasso Learning Solutions                              |
| Garrett     | Tami       | Government Finance Officers Association                 |
| Geary       | Ellen      | Becker                                                  |
| Gettelman   | Mel        | Baker Tilly                                             |
| Gimpel      | Mary       | Sensiba LLP                                             |
| Goldsmith   | Molly      | BerryDunn                                               |
| Gordon      | Moir       | Becker Professional Education                           |
| Gottschall  | Melissa    | Becker Professional Education                           |
| Goyette     | Lisa       | Kaplan Financial                                        |
| Grant       | Michael    | HFMA                                                    |
| Gray        | Morgan     | U.S. Bancorp Asset Management, Inc.                     |
| Greene      | Kaelynn    | NAIC                                                    |
| Haggerty    | Molly      | LCvista                                                 |
| Hambly      | Dee        | IRIS Global                                             |
| Haynes      | Candice    | Internal Revenue Service                                |
| Hebert      | Waneta     | Hospitality Financial & Technology Professionals (HFTP) |
| Hendershot  | Jeniffer   | EY                                                      |
| Hern        | Thomas     | Dealer CPA Network                                      |
| Heron       | Skoshi     | The Baker Group                                         |
| Hessling    | Cindy      | LCvista                                                 |
| Hodges      | Amelia     | North Carolina Association of CPAs                      |
| Holl        | Suzanne    | CAMICO                                                  |
| Hopkins     | Beth       | PwC                                                     |
| Iwata       | Lisa       | Clark Nuber                                             |
| Jackson     | Eric       | Becker                                                  |
| James       | Connie     | Office of the Missouri State Auditor                    |
| Jaspen      | Amy        | Capital One                                             |
| Johns       | Meredith   | NASACT                                                  |
| Johnson     | Jennifer   | FICPA                                                   |
| Johnson     | Glenda     | NASACT                                                  |



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|---------------------|-----------|-------------------------------------------------|
| Kavistan            | Natalie   | GCAS                                            |
| Keim                | Julie     | Chazin and Company                              |
| Kenady              | Jill      | University of Illinois Tax School               |
| Keyserling          | Benjamin  | Thomson Reuters                                 |
| Kezmarsky           | Tammy     | Protiviti Inc.                                  |
| Kiew                | Jay       | The Change Fluency Co.                          |
| Kind                | Julie     | Mortgage Bankers Association                    |
| Klementowski        | Kristin   | H & R Block                                     |
| Klepik              | Kelli     | NGMA                                            |
| Klosterhoff         | Lauren    | Center for Professional Education, Inc.         |
| Kundu               | Debashish | Asterid Group Inc                               |
| Laney               | Cara      | Bonadio & Co., LLP                              |
| Lauffer             | Shannon   | Johnson Global Advisory                         |
| Layman              | Brooke    | PwC                                             |
| Leas                | Kelsey    | Plante Moran                                    |
| Leibson             | Diane     | CBIZ Inc.                                       |
| Libertiny           | Robyn     | PwC                                             |
| Ling                | Bridget   | Cohen & Co Advisory, LLC                        |
| Littlejohn          | Michelle  | Department of the Treasury                      |
| Lo Casto            | Anna      | Choreo Advisors, LLC                            |
| Lowery              | Marianne  | UHY Advisors, Inc.                              |
| Lynch               | Joe       | Johnson Global Advisory                         |
| Macia               | Ryan      | Suralink                                        |
| Mack                | Brett     | NBI Inc                                         |
| Maevry              | Aarin     | Association of Certified Fraud Examiners (ACFE) |
| Marion              | Danielle  | LumiQ                                           |
| Marsh               | Gina      | University of Illinois Tax School               |
| McElroy             | Mackenzie | BDO USA, P.C.                                   |
| McGuire             | Paige     | Moore Colson                                    |
| Mcintyre            | Joseph    | NASA                                            |
| Mehta               | Juhi      | Deloitte LLP                                    |
| Meyers              | Ciara     | PFM Financial Advisors                          |
| Meyers              | Katie     | StoneX                                          |
| Miller              | Vickie    | NC League of Municipalities                     |
| Miller              | Tie       | BDO                                             |
| Minsavage           | Pelagia   | Wiss & Company                                  |
| Mohler              | Allison   | PwC                                             |
| Muranaka            | Michelle  | Armanino                                        |
| Murphy              | Amy       | EY                                              |
| Newsom-McCurdy, CAE | Linda     | VA Society of CPAs                              |



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|                 |           |                                       |
|-----------------|-----------|---------------------------------------|
| Ochoa           | Kassandra | GHJ                                   |
| Ortez           | Cumbuka   | Internal Revenue Service - SL - NPL   |
| Ostrem          | Shelley   | Oregon BOA                            |
| Ottiger         | Andrew    | Practising Law Institute              |
| Paillet         | Lori      | UHY LLP                               |
| Panik           | Thaddius  | MGO                                   |
| Parrish         | Tracy     | Forvis Mazars, LLP                    |
| Patterson       | Lindsay   | LCvista                               |
| Payton          | Morgan    | EY                                    |
| Pearson         | Sasha-Kay | PwC                                   |
| Pena            | Edith     | ICBA                                  |
| PETERS          | DANIEL    | SEC                                   |
| Peterson        | Marijo    | Eide Bailly LLP                       |
| Potts           | Sean      | U.S. Department of Justice - ATF      |
| Poulter         | Deborah   | Praxity Global Alliance Ltd           |
| Presley         | Nick      | Plante Moran                          |
| Prillaman       | Kelly     | USDA OIG                              |
| Raju            | Menal     | Mortgage Bankers Association          |
| Regier          | Michelle  | Your Part-Time Controller, LLC        |
| Reilly          | Beckie    | 20-20 Services LLC                    |
| Rice-Napolitano | Jaime     | Practising Law Institute              |
| Richie          | Jessica   | Brianne Academy                       |
| Rinn            | Michele   | Choreo LLC                            |
| Rivera          | Chris     | MY-CPE LLC                            |
| Roden           | Normandy  | University of Colorado                |
| Rodriguez       | Stacey    | Western CPE                           |
| Roedel          | Tori      | University of Colorado                |
| Rudeen          | Robyn     | Deloitte                              |
| Russell         | Tami      | UNT Executive & Professional Learning |
| Santora         | Jaime     | PwC                                   |
| Sawchuk         | Peter     | UHY Advisors, Inc.                    |
| Schwartz        | Andrea    | KPMG                                  |
| Schwartz        | Brendan   | LumiQ                                 |
| Seeber          | Courtney  | Anders CPA                            |
| Segner          | Mark      | Thomson Reuters                       |
| Sehgal          | Rita      | EY                                    |
| Skripko         | Michelle  | ATF                                   |
| Smith           | Tamsin    | University of Illinois Tax School     |
| Spencer         | Elise     | Athena L&D                            |
| Steele          | Justin    | Tennessee Society of CPAs             |



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|-------------|-----------|-------------------------------------------------------|
| Stevens     | Karen Ann | Cherry Bekaert                                        |
| Stevens     | Ellen     | BDO USA, LLP                                          |
| Stokes      | Joanne    | Pinion, LLC                                           |
| Strawn      | Gayle     | Franchise Times                                       |
| Stutler     | Marc      | Forvis Mazars, LLP                                    |
| Sumpter     | Christina | Baker Tilly x Berkowitz Pollack Brant Advisors + CPAs |
| Sweet       | Michael   | BDO USA                                               |
| Swift       | Kella     | U.S. Army Audit & Analytics Agency                    |
| Thomas      | Maria     | AICPA-CIMA                                            |
| Thomas      | Eileen    | RubinBrown LLP                                        |
| Thomas      | Donna     | RSM US, LLP                                           |
| Tucker      | Emily     | RubinBrown                                            |
| Turner      | Danielle  | LCvista                                               |
| VanDerKamp  | Chrystene | Redpath & Company                                     |
| Varela      | Claudia   | JPMorgan Chase                                        |
| Vega        | Aljenis   | AICPA                                                 |
| Villany     | Mary      | GRF CPAs & Advisors                                   |
| Waid        | Kathleen  | Calculo                                               |
| Ward        | Brian     | Internal Revenue Service                              |
| Watrous     | Casey     | RSM LLP                                               |
| Webb        | Christina | Institute for Professionals in Taxation               |
| Weber       | Alicia    | Department of the Treasury OIG                        |
| Wehrmeister | Katie     | BPM                                                   |
| Weinlein    | Stephanie | Avantax by Cetera                                     |
| Wheeler     | Julie     | Kearney & Company                                     |
| Whittaker   | Carlos    | Carlos Whittaker, LLC                                 |
| Woislav     | Julia     | LCVista                                               |
| Yates       | Brittany  | The Institute of Internal Auditors                    |
| Zarins      | Jennifer  | Eisner Advisory Group LLC                             |



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## Registration by Attendee Organization

| Organization                                          | Last Name    | First Name |
|-------------------------------------------------------|--------------|------------|
| 20-20 Services                                        | Bilodeau     | Sean       |
| 20-20 Services LLC                                    | Reilly       | Beckie     |
| Abdo, LLP                                             | Atchley      | Lauren     |
| AICPA                                                 | Vega         | Aljenis    |
| AICPA-CIMA                                            | Thomas       | Maria      |
| Allinial Global                                       | Blattenbauer | Carla      |
| Amplifire                                             | Clayton      | Cristina   |
| Anders CPA                                            | Seeber       | Courtney   |
| Armanino                                              | Muranaka     | Michelle   |
| Association of Certified Fraud Examiners (ACFE)       | Maevry       | Aarin      |
| Asterid Group Inc                                     | KUNDU        | DEBASHISH  |
| ATF                                                   | Skripko      | Michelle   |
| Athena L&D                                            | Spencer      | Elise      |
| Avantax by Cetera                                     | Weinlein     | Stephanie  |
| Avantax, a Cetera Company                             | Fox          | Emily      |
| Baker Tilly                                           | Gettelman    | Mel        |
| Baker Tilly x Berkowitz Pollack Brant Advisors + CPAs | Sumpter      | Christina  |
| BDO                                                   | Miller       | Tie        |
| BDO USA                                               | Boone        | Kasey      |
| BDO USA                                               | Sweet        | Michael    |
| BDO USA, LLP                                          | Stevens      | Ellen      |
| BDO USA, P.C.                                         | McElroy      | Mackenzie  |
| Becker                                                | Curcuro      | Kristin    |
| Becker                                                | Geary        | Ellen      |
| Becker                                                | Jackson      | Eric       |
| Becker Professional Education                         | Dryden       | Bonnie     |
| Becker Professional Education                         | Gottschall   | Melissa    |
| Becker Professional Education                         | Gordon       | Moir       |
| BerryDunn                                             | Goldsmith    | Molly      |
| Blue & Co., LLC                                       | Freeman      | Jacqueline |
| Board of Gov of the Federal Reserve System            | Farnsworth   | Minh       |
| Bonadio & Co., LLP                                    | Laney        | Cara       |
| BPM                                                   | Wehrmeister  | Katie      |
| Brianne Academy                                       | Richie       | Jessica    |
| Brown Edwards                                         | Blevins      | Cheri      |
| Calculo                                               | Waid         | Kathleen   |
| CAMICO                                                | Holl         | Suzanne    |
| Capital One                                           | Ford         | Brooke     |
| Capital One                                           | Jaspen       | Amy        |



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|                                                                        |             |           |
|------------------------------------------------------------------------|-------------|-----------|
| Carlos Whittaker, LLC                                                  | Whittaker   | Carlos    |
| Carr, Riggs & Ingram                                                   | Burns       | Heather   |
| Caseware International                                                 | Davies      | Sarah     |
| CBIZ Inc.                                                              | Leibson     | Diane     |
| Center for Professional Education, Inc.                                | Klosterhoff | Lauren    |
| CeriFi (CPEdge, Fast Forward Academy, Gear Up, and Spidell Publishing) | Counts      | Ashley    |
| Chazin and Company                                                     | Keim        | Julie     |
| Cherry Bekaert                                                         | Stevens     | Karen Ann |
| Choreo Advisors, LLC                                                   | Lo Casto    | Anna      |
| Choreo LLC                                                             | Rinn        | Michele   |
| Clark Nuber                                                            | Iwata       | Lisa      |
| Cohen & Co Advisory, LLC                                               | Ling        | Bridget   |
| CPA.com                                                                | Briggs      | Kaitlin   |
| Dealer CPA Network                                                     | Hern        | Thomas    |
| Dean Dorton                                                            | Boudreau    | Meghan    |
| Deloitte                                                               | Arena       | Jenny     |
| Deloitte                                                               | Estes       | Eileen    |
| Deloitte                                                               | Rudeen      | Robyn     |
| Deloitte LLP                                                           | Mehta       | Juhi      |
| DEPARTMENT OF THE TREASURY                                             | Littlejohn  | Michelle  |
| Department of the Treasury OIG                                         | Weber       | Alicia    |
| DOJ - Bureau of ATF                                                    | Boddie      | Stephanie |
| Educe (Calculo)                                                        | Asinger     | Emily     |
| Eide Bailly LLP                                                        | Peterson    | Marijo    |
| Eisner Advisory Group LLC                                              | Zarins      | Jennifer  |
| EisnerAmper                                                            | Bialek      | Erika     |
| EY                                                                     | Hendershot  | Jeniffer  |
| EY                                                                     | Murphy      | Amy       |
| EY                                                                     | Payton      | Morgan    |
| EY                                                                     | Sehgal      | Rita      |
| FICPA                                                                  | Johnson     | Jennifer  |
| Forvis Mazars                                                          | Davenport   | Katie     |
| Forvis Mazars, LLP                                                     | Parrish     | Tracy     |
| Forvis Mazars, LLP                                                     | Stutler     | Marc      |
| Franchise Times                                                        | Strawn      | Gayle     |
| Frank, Rimerman + Co. LLP                                              | Fiore       | Danielle  |
| Frazier & Deeter                                                       | Benham      | Katie     |
| Galasso Learning Solutions                                             | Galasso     | Frank     |
| GCAS                                                                   | Kavistan    | Natalie   |



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|                                             |              |           |
|---------------------------------------------|--------------|-----------|
| GHJ                                         | Ochoa        | Kassandra |
| Government Finance Officers Association     | Garrett      | Tami      |
| GRF CPAs & Advisors                         | Villany      | Mary      |
| H & R Block                                 | Klementowski | Kristin   |
| HCVT                                        | Chang        | Winnie    |
| HFMA                                        | Baker        | Ashlee    |
| HFMA                                        | Grant        | Michael   |
| Hospitality Fin & Tech Professionals (HFTP) | Hebert       | Waneta    |
| ICBA                                        | Pena         | Edith     |
| IMA                                         | Chojnacki    | Laura     |
| Institute for Professionals in Taxation     | Webb         | Christina |
| Internal Revenue Service                    | Haynes       | Candice   |
| Internal Revenue Service                    | Ward         | Brian     |
| Internal Revenue Service - SL - NPL         | Ortez        | Cumbuka   |
| IRIS Global                                 | Hambly       | Dee       |
| ISACA                                       | Fogelsonger  | Kathleen  |
| Johnson Global Advisory                     | Lauffer      | Shannon   |
| Johnson Global Advisory                     | Lynch        | Joe       |
| JPMorgan Chase                              | Varela       | Claudia   |
| Kahn, Litwin, Renza                         | Fontanella   | Kate      |
| Kaplan Financial                            | Goyette      | Lisa      |
| Kearney & Company                           | Wheeler      | Julie     |
| KPMG                                        | Schwartz     | Andrea    |
| LCvista                                     | Crabb        | Olivia    |
| LCvista                                     | Haggerty     | Molly     |
| LCvista                                     | Hessling     | Cindy     |
| LCvista                                     | Patterson    | Lindsay   |
| LCvista                                     | Turner       | Danielle  |
| LCVista                                     | Woislaw      | Julia     |
| LeadingAge                                  | Daniel       | Emily     |
| LumiQ                                       | Abrams       | Jessee    |
| LumiQ                                       | Marion       | Danielle  |
| LumiQ                                       | Schwartz     | Brendan   |
| Management Concepts                         | Collins      | Barry     |
| MGO                                         | Panik        | Thaddius  |
| Moore Colson                                | McGuire      | Paige     |
| Mortgage Bankers Association                | Kind         | Julie     |
| Mortgage Bankers Association                | Raju         | Menal     |
| MY-CPE LLC                                  | Rivera       | Chris     |
| NAIC                                        | Greene       | Kaelynn   |



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|                                      |                 |           |
|--------------------------------------|-----------------|-----------|
| NASA                                 | Mcintyre        | Joseph    |
| NASACT                               | Johns           | Meredith  |
| NASACT                               | Johnson         | Glenda    |
| NBI Inc                              | Mack            | Brett     |
| NC League of Municipalities          | Edmundson       | Sharon    |
| NC League of Municipalities          | Miller          | Vickie    |
| NGMA                                 | Klepik          | Kelli     |
| North Carolina Association of CPAs   | Hodges          | Amelia    |
| Office of the Missouri State Auditor | Beeler          | Susan     |
| Office of the Missouri State Auditor | James           | Connie    |
| Oppenheimer & Co. Inc                | Chakinala       | Sangeetha |
| Oregon BOA                           | Ostrem          | Shelley   |
| PFM Financial Advisors               | Meyers          | Ciara     |
| Pinion, LLC                          | Stokes          | Joanne    |
| PKF O'Connor Davies                  | DiGuseppi       | Annette   |
| Plante Moran                         | Leas            | Kelsey    |
| Plante Moran                         | Presley         | Nick      |
| PowerPlan, Inc.                      | Arra            | Amy       |
| Practising Law Institute             | Ottiger         | Andrew    |
| Practising Law Institute             | Rice-Napolitano | Jaime     |
| Praxity Global Alliance Ltd          | Poulter         | Deborah   |
| Protiviti Inc.                       | Kezmarsky       | Tammy     |
| PwC                                  | Hopkins         | Beth      |
| PwC                                  | Layman          | Brooke    |
| PwC                                  | Libertiny       | Robyn     |
| PwC                                  | Mohler          | Allison   |
| PwC                                  | Pearson         | Sasha-Kay |
| PwC                                  | Santora         | Jaime     |
| Redpath & Company                    | VanDerKamp      | Chrystene |
| Rice University                      | Cykala          | Lori      |
| RKL LLP                              | Chelius         | Samantha  |
| RSM LLP                              | Watrous         | Casey     |
| RSM US LLP                           | Carey           | Bryan     |
| RSM US, LLP                          | Thomas          | Donna     |
| RubinBrown                           | Tucker          | Emily     |
| RubinBrown LLP                       | Thomas          | Eileen    |
| SEC                                  | Peters          | Daniel    |
| Sensiba LLP                          | Gimpel          | Mary      |
| StoneX                               | Meyers          | Katie     |
| Suralink                             | Macia           | Ryan      |



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|                                       |                |           |
|---------------------------------------|----------------|-----------|
| Surgent                               | Benjamin       | Janet     |
| TaxSpeaker                            | Doyle          | Danielle  |
| Tennessee Society of CPAs             | Steele         | Justin    |
| The Baker Group                       | Heron          | Skoshi    |
| The Change Fluency Co.                | Kiew           | Jay       |
| The Institute of Internal Auditors    | Yates          | Brittany  |
| Thomson Reuters                       | Keyserling     | Benjamin  |
| Thomson Reuters                       | Segner         | Mark      |
| U.S. Army Audit & Analytics Agency    | Swift          | Kella     |
| U.S. Bancorp Asset Management, Inc.   | Gray           | Morgan    |
| U.S. Department of Justice - ATF      | Potts          | Sean      |
| UHY Advisors, Inc.                    | Lowery         | Marianne  |
| UHY Advisors, Inc.                    | Sawchuk        | Peter     |
| UHY LLP                               | Paillet        | Lori      |
| University of Colorado                | Roden          | Normandy  |
| University of Colorado                | Roedel         | Tori      |
| University of Illinois Tax School     | Kenady         | Jill      |
| University of Illinois Tax School     | Marsh          | Gina      |
| University of Illinois Tax School     | Smith          | Tamsin    |
| UNT Executive & Professional Learning | Russell        | Tami      |
| USDA OIG                              | Prillaman      | Kelly     |
| VA Society of CPAs                    | Newsom-McCurdy | Linda     |
| Vertex Inc.                           | Bruck          | Linda     |
| Weaver and Tidwell, L.L.P.            | Bartenfelder   | Erin      |
| Western CPE                           | Adventure      | Elizabeth |
| Western CPE                           | Rodriguez      | Stacey    |
| Wipfli Advisory LLC                   | Dulhanty       | Sarah     |
| Wiss & Company                        | Minsavage      | Pelagia   |
| Your Part-Time Controller, LLC        | Regier         | Michelle  |



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## NASBA Staff

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Easter  
Emmer  
Hartman  
Joseph  
Mason  
Mourcy  
Newbern  
Scruggs  
Thompson  
Tongate  
Wolfe  
Word

Andrew  
Sabrina  
Thaddaeus  
Richard  
Bill  
Patricia  
Alyssa  
Megan  
Karen  
Sedrik  
Erin  
Jill  
Amy  
Elizabeth  
Madison

# NASBA

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### Speaker Bios

#### Erika Bialek

##### Director, Assurance Learning & Development - EisnerAmper

Erika Bialek, CPA, PHR, SHRM-CP is director of Assurance Learning & Development at EisnerAmper, where she leads learning strategy, curriculum design, professional development programs, and compliance



initiatives for assurance professionals across the organization. In this role, she collaborates closely with firm leadership to modernize learning experiences, adopt emerging technologies, and build scalable programs that support both technical excellence and the

development of professional judgment.

With more than 25 years of experience in public accounting and nearly two decades focused on learning and development, Bialek brings a unique perspective that combines audit experience with talent development knowledge. Prior to joining EisnerAmper in 2021, she served as senior manager of Learning & Organizational Development at Marcum LLP, where she helped build and manage large-scale learning programs for thousands of professionals. Earlier in her career, she was an audit manager with Deloitte.

Bialek is an active contributor to the accounting profession and currently serves as a member of the NASBA CPE Standards Working Group, where she collaborates with other professionals to explore the future of continuing professional education. Her recent work has focused on the intersection of artificial intelligence, emerging technologies, competency development, and the evolving role of CPE in preparing professionals for a rapidly changing professional environment.

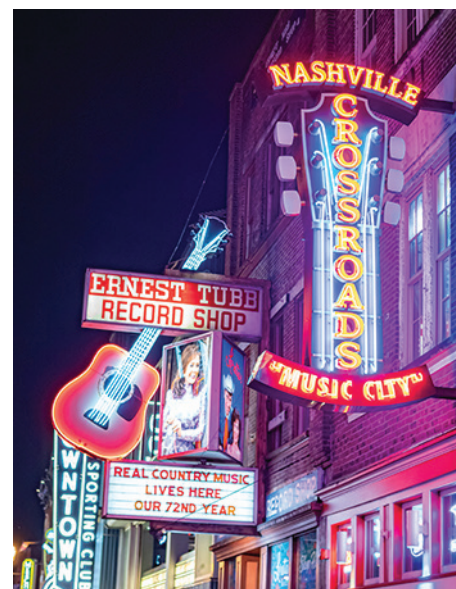
A New York CPA, PHR and SHRM-CP, Bialek holds

a Bachelor of Science in Accounting and Business Administration from Washington and Lee University and a Graduate Certificate in Human Resource Management from Empire State University. She is passionate about helping organizations develop future-ready talent and creating learning experiences that drive measurable impact.

#### Thaddaeus Douglas

##### National Registry Account Manager - NASBA

Thaddaeus Douglas has served as an account manager for NASBA's National Registry of CPE Sponsors since February 2025, where he works closely with Registry sponsors. Prior to joining NASBA, he spent 11 years as an educator, fostering a passion for learning and professional growth. Douglas enjoys his work and is dedicated to supporting impactful continuing education experiences.



# NASBA

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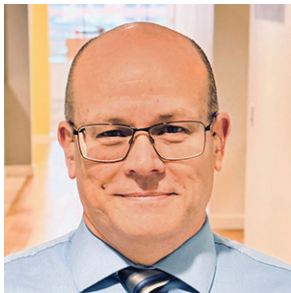
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### Speaker Bios

#### Rich Easter

##### Senior Manager, National Registry - NASBA

Rich Easter is the senior manager of the National Registry of CPE Sponsors at NASBA, where he leads initiatives that support sponsor compliance, operational excellence, and the implementation of evolving



CPE standards across the profession. He oversees Registry operations and collaborates with account managers and stakeholders to promote quality and continuous improvement in continuing professional education.

Prior to joining NASBA, Easter worked in adult education with the U.S. Department of Defense, gaining experience in program administration and stakeholder engagement. He holds a bachelor's degree in history from the University of Maryland and an MBA from Vanderbilt University.



#### William Emmer, CPA

##### Chief Operating Officer - NASBA

William "Bill" Emmer serves as chief operating officer of NASBA. In this role, Emmer oversees multiple operations at NASBA including services related to the Uniform CPA Examination (CPA Exam), CPA licensing, the National Candidate Database, the National Registry of CPE Sponsors and other products and services, as well as Information Technology (IT).



Emmer has more than 30 years of business and leadership experience. Most recently, he acted as the enterprise program manager of the CPA Exam where he was responsible for the day-to-day operations across the NASBA, AICPA and Prometric (NAP) enterprise. In this role, Emmer was instrumental in launching continuous testing of the CPA Exam and launching the CPA Exam in numerous international countries.

Emmer's career began with Price Waterhouse in the audit practice and later transferred to the newly formed systems audit group. He then worked in cross-functional roles at Becton Dickinson, The Seagram Company Ltd., The Seagram Spirits and Wine Group, and Universal Music Group. Throughout the years, Emmer has garnered experience in organizational and operational transformation, reengineering, enterprise change management and more.

A New Jersey native, Emmer earned a Bachelor of Science in Accounting from Montclair State University and a Master of Business Administration from Columbia University. He has been involved in several community leadership roles, including over nine years of membership and service with the Bergen Highlands Ramsey Chapter of Rotary International and 10 years of leadership with the Board of Public Works in Ramsey, NJ.

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### Speaker Bios

#### Jay Kiew

##### Change Fluency Expert

##### Chief Innovation Officer - The Change Fluency Co

Jay Kiew is an innovation strategist and the bestselling author of *Change Fluency*, with more than 15 years of transformation experience. He has created more than \$2B of impact for 400+ executives by designing, developing, and delivering organizational transformation, but his story extends far beyond the professional arena. Kiew is a half-blind cancer survivor, whose life is a testament to resilience in the face of adversity. His remarkable blend of professional expertise and personal resilience equips leaders to hack through the thick of change and disruption.

Kiew spent his corporate career working at Deloitte, TELUS and ADP, where he led mission-critical strategic transformations. This included a \$150-million primary care health policy reform, \$13-million tech transformations, doubling app users from one to two million, and scaling 15 product lines to \$35 million in 12 months. As the chief innovation officer at The Change Fluency Co, he now invests his time in equipping organizations in speaking the language of change better, particularly in Agentic AI innovation.

At the age of 19, Kiew became the world's youngest Distinguished Toastmaster. He has since been featured in *Forbes*, *Entrepreneur*, *USA Today*, *Digital Journal*, the *Financial Times*, *Globe and Mail*, *Financial Post*, *Ivey Business Journal*, *Change Leadership*, and more.

Kiew holds an MBA from the Ivey Business School and lives in Vancouver with his wife, two daughters, and a stubborn Shiba Inu named Brooklyn.



#### Aarin Maevery

##### Curriculum Quality Specialist - Association of Certified Fraud Examiners

Aarin Maevery has been the curriculum quality specialist at the Association of Certified Fraud Examiners (ACFE) since 2023. In this role, she partners with cross-functional teams to ensure training materials meet high standards for accuracy, accessibility, and learning impact. Maevery also ensures that all training materials across the delivery methods meet NASBA's requirements for learning. She is excited to participate in the Registry Summit panel and share best practices and strategies for implementing the NASBA Standards at a global-reaching organization.



#### Megan Mason

##### Compliance Auditor, National Registry - NASBA

Megan Mason has been with NASBA since 2019, supporting the National Registry of CPE Sponsors through sponsor engagement and operational processes. She began her career as an Account Manager, working closely with sponsors to navigate application requirements and maintain compliance with NASBA standards. Megan was recently promoted to Compliance Auditor, where she conducts sponsor audits and reviews CPE programs to ensure alignment with NASBA's Statement on Standards. With experience in both sponsor support and



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compliance review, Megan brings a practical, detail-oriented perspective on program quality and regulatory expectations.

Megan holds a Bachelor of Arts in Integrative Studies with a concentration in Elementary Education from George Mason University.

#### Karen Mourcy

##### Compliance Auditor, National Registry - NASBA

Karen Mourcy has been with NASBA since 2020 and serves as a compliance auditor with the National Registry Team. As compliance auditor, she conducts desk audits of continuing professional education (CPE) sponsors, evaluating program materials and instructional design elements to ensure compliance with NASBA's Statement on Standards. With experience in both sponsor applications and auditing, Mourcy brings practical insight into common compliance challenges and effective solutions.

A graduate of Hollins University, Mourcy holds a Bachelor of Arts in English with a concentration in international finances.



#### Sedrik Newbern

##### Chief Ethics Officer - NASBA

##### President - NASBA Center for the Public Trust (CPT)

Sedrik Newbern serves as chief ethics officer of the National Association of State Boards of Accountancy (NASBA) and president of the NASBA Center for the Public Trust (CPT). As chief ethics officer, Newbern oversees ethics compliance initiatives for the organization. He also represents NASBA in ethics related activities within the accounting profession. As CPT president, Newbern oversees the non-profit ethics and leadership organization's day-to-day operations and a growing number of CPT programs. His tenure with NASBA began in 2019, where he served as CPT operations director. In 2021, he transitioned to a consultant for the CPT.

Newbern is also president of Newbern Consulting, LLC, an Amazon best-selling author and a John Maxwell Certified Coach, Trainer and Speaker. With a passion for storytelling and helping others find their passion and restoration, he has published multiple books as well as consulted with other authors to publish more than 40 books. Additionally, he has shared his knowledge, experience and passion for entrepreneurship as a college professor in his role as entrepreneur-in-residence in the Department of Management for Gordon Ford College of Business at Western Kentucky University.



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### Speaker Bios

#### Linda Newsom-McCurdy

##### Senior Director of Learning - Virginia Society of CPAs (VSCPA)

Linda Newsom-McCurdy, CAE, is the senior director of learning at the Virginia Society of Certified Public Accountants (VSCPA), where she has spent the past 19 years leading the development and delivery of professional education programs for CPAs across Virginia. In her role, Newsom-McCurdy oversees the organization's learning strategy, including a diverse portfolio of virtual



and in-person conferences, seminars, and continuing professional education (CPE) programs. She leads a team of five learning professionals dedicated to delivering high-quality educational experiences that help CPAs stay current, compliant, and prepared for the evolving demands of the profession.

In addition to her work with the VSCPA, Newsom-McCurdy serves on the National Association of State Boards of Accountancy (NASBA) CPE Standards Working Group, contributing to the development and advancement of standards that support quality continuing education for accounting professionals nationwide.

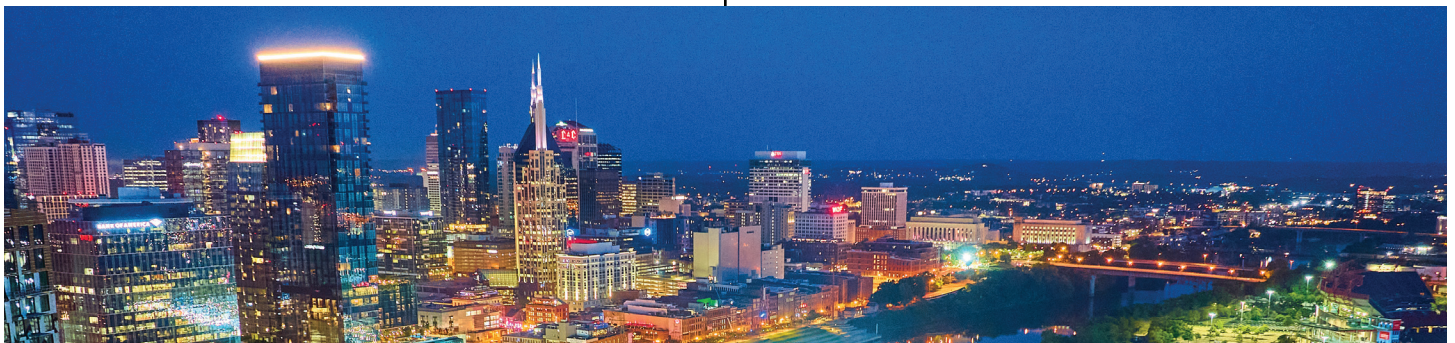
#### Chris Rivera

##### Director of Strategic Growth - MYCPE ONE

Chris Rivera has been part of MYCPE ONE for nearly eight years, leading strategic growth and partnership initiatives across the accounting profession. His role has given him the opportunity to work closely with CPAs, accounting firm leaders, and professional organizations, including NASBA.



Through years of conversations with accounting professionals, Rivera has developed a strong understanding of the evolving challenges, expectations, and needs of CPAs and accounting firms. He works to bring those perspectives back into MYCPE ONE, helping shape solutions that address the changing needs of the profession while aligning with NASBA standards and expectations.



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### Speaker Bios

#### Erin Scruggs, MBA

##### Associate Director, National Registry - NASBA

Erin Scruggs is the associate director of the National Registry of CPE Sponsors at NASBA, a role she took on in August 2024. In this role, she oversees the Registry's operations, membership growth, and updates to the CPE Standards for Continuing Professional Education while serving as the staff liaison to NASBA's CPE Committee and CPE Standards Working Group. Since joining NASBA in 2013, Scruggs has held multiple leadership roles, including managing the Accountancy Licensing Library (ALL), supporting state boards, and leading transitions in CPE Audit Service. Before NASBA, she spent 10 years at Gaylord Opryland Resort in reservations and ticketing management.

Scruggs holds a bachelor's degree in social work and an MBA from Trevecca Nazarene University and has extensive experience in business management, project coordination, and regulatory compliance.



#### Rita Sehgal

##### Learning and CPE Compliance Leader - EY

Rita Sehgal is a director and EY's U.S. learning and continuing professional education (CPE) compliance leader, responsible for overseeing the firm's learning compliance strategy, governance and regulatory compliance programs. She also leads learning quality risk mitigation for the U.S. practice, helping ensure that learning experiences meet the highest standards of quality, compliance and risk management.

With more than two decades of experience spanning learning compliance, continuing professional education, regulatory governance, and learning technology solutions, Sehgal is a recognized leader in the profession. Her expertise includes CPE compliance program administration, NASBA Registry sponsorship requirements, mandatory learning governance, learning quality risk mitigation, and the implementation of technology-enabled compliance solutions.

Before rejoining EY in 2016, Sehgal worked at Xerox, where she played a key role in bringing a firm-wide CPE compliance tracking platform to market and supporting accounting firms in meeting evolving regulatory requirements. Sehgal earned both her Bachelor of Science in Allied Medicine and her Master of Health Administration in Finance from The Ohio State University.



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### Speaker Bios

#### Amy Tongate

##### Director, Compliance Services - NASBA

Amy Tongate serves as NASBA's director, Compliance Services— responsible for the Accountancy Licensee Database (ALD), Accountancy Licensing Library (ALL), CPAmobility.org , CPE Audit Service platform, Rules Engine Service application and the National Registry of CPE Sponsors. She joined NASBA in December 2007 as a CPetracking account manager. From 2008-2013, Tongate managed two large firm accounts on the CPetracking platform— managing nightly feed processing, custom development requests and CPE-related questions for those clients. In addition, she conducted research on CPE rule changes, writing business requirements and testing programmed rule changes. Tongate was promoted to product manager for CPetracking in 2013, as it was being transitioned from an individual CPA and firm platform to a service that could be used as a tool for use by boards in conducting CPE audits.



In 2017, she became the senior manager, CPE Audit Service and the Rules Engine Service and in January 2019, she was promoted to associate director, Compliance Services. The ALD came under her responsibilities in November 2021. Tongate assumed the role of director, Compliance Services in August 2024 adding ALL, CPAmobility.org and the Registry to her scope of responsibility. Across the Compliance Services products, she guides the direction of the various business lines and related activities, along with priorities, strategies and objectives. Further, Tongate ensures that each business line's team has and adheres to a set of policies and procedures to

ensure the accuracy and integrity of their product's content and functionality.

She earned her MBA through the Vanderbilt Owen Graduate School of Management in 2015. Tongate has extensive experience in client management and IT resource collaboration. She is also very practiced in research and analysis of business requirements, process improvements and creating documentation for applications used by internal and external stakeholders.

#### Carlos Whittaker

##### Best-Selling Author and Expert Storyteller

Carlos Whittaker is a best-selling author, expert storyteller, and impactful speaker to all kinds of audiences— from auditors to teachers to non-profit leaders to dermatologists. No matter who you are, his message is for you.

Whittaker uses his vast and varied personal life experience to captivate and engage audiences in ways that few else can. Whether your team is suffering from burnout, conflict, distraction or disengagement, he is sure to reinvigorate them with insight, humor and inspiration. With his person-oriented talks, *How to Human* and *Moment Maker*, Whittaker will remind your organization that when we are good to ourselves, we can be even better for others. Humans do not exist in the vacuum of the workplace, so when we address the things going on in the background, we create a greater capacity for relationships, work, creativity and patience. Whittaker will equip your team to become not just better employees, but better coworkers, leaders, friends, parents, spouses, and, most importantly, better humans. Join him and countless others in the pursuit of being human together.



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## 2026 NATIONAL REGISTRY SUMMIT

Sept. 22 – 23, 2026 | Nashville, TN

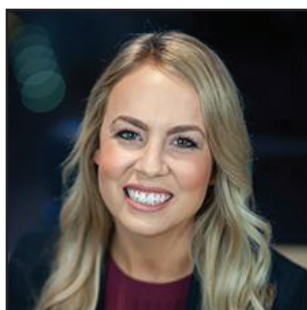
### Speaker Bios

He and his wife Heather live in Nashville, Tennessee, with their three amazing children, where you can find them working on the family farm, planning trips around the world, and dancing to Single Ladies (seriously, Google it).

#### **Elizabeth Wolfe, Esq.**

##### **Deputy Chief Legal Officer - NASBA**

Elizabeth Wolfe, Esq., serves as deputy chief legal officer at the National Association of State Boards of Accountancy (NASBA). In this capacity, she is a strategic advisor to NASBA's executive leadership with practice concentration in regulatory law and legislative policy



supporting NASBA's mission to enhance the effectiveness and advance the common interests of its 55 member Boards of Accountancy and administration of the Uniform CPA Exam, with international testing. Ms. Wolfe counsels C-suite and senior leadership on legal risk, compliance,

data privacy, and governance with a focused oversight on initiatives involving artificial intelligence and accessibility. She also oversees NASBA's Americans with Disabilities Act (ADA) team with respect to Testing Accommodations for the CPA Examination.

Prior to joining NASBA in 2018, Wolfe was assistant general counsel at the Tennessee Department of Commerce and Insurance providing legal guidance to the Regulatory Boards Division. Her portfolio included advising multiple professional licensing boards on federal antitrust law, the Tennessee Open Records Act, and the Tennessee Open Meetings Act, and she was responsible for drafting legislation and administrative regulations.

Wolfe graduated cum laude from the University of Tennessee where she double majored in art history

and political science. She earned her J.D. from Belmont University College of Law where she served as vice president of the Student Bar Association.

She is an active member of the Tennessee Bar Association, the Association of Corporate Counsel Small Law Department Network, Belmont Law Alumni Council, and the Nashville Bar Association, currently chairing the In-house Attorney Committee. Wolfe mentors law students and serves on the board of Buchanan Arts, a nonprofit art studio focused on after-school at risk youth programming that promotes creativity and community. She was recognized as one of Nashville's Top 30 Under 30 in 2018 for professional achievement and community involvement and was a member of the 2023-2024 Nashville Bar Foundation Leadership Forum. She enjoys spending time in her hometown of Nashville, TN, with her husband, almost 5-year-old daughter, and almost 3-year-old son.

#### **Madison Word**

##### **National Registry Account Manager - NASBA**

Madison Word joined NASBA in February 2026 as a National Registry account manager, working closely with CPE sponsors to support compliance and continuing professional education. Prior to joining NASBA, she worked as an educator, where she developed skills in evaluating educational content, analyzing requirements, and ensuring alignment with established standards. She is committed to providing knowledgeable, responsive support and contributing to quality continuing professional education.





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### SPEAKER PRESENTATIONS

|                      |                                                                                                                                                                                           |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Erika Bialek         | Skills in Motion: How AI and Emerging Tech are Redefining Professional Development and CPE                                                                                                |
| Thaddeaus Douglas    | Compliance Karaoke: Completing the Lyrics of the Standards<br>QAS™ Self Study, Nano Learning & Blended Learning: The Classics & New Releases of the 2026 Standards                        |
| Rich Easter          | The Standards Soundtrack: What Sponsors Need to Know<br>Q&A Session with Registry Leadership                                                                                              |
| Bill Emmer           | NASBA Updates                                                                                                                                                                             |
| Jay Kiew             | Evolve: Redefining Work in the Age of Agentic AI                                                                                                                                          |
| Aarin Maevry         | The Steady Beat of Sponsor Best Practices                                                                                                                                                 |
| Megan Mason          | In Tune with the Standards: An Audit Deep Dive                                                                                                                                            |
| Karen Mourcy         | In Tune with the Standards: An Audit Deep Dive                                                                                                                                            |
| Linda Newsom-McCurdy | The Steady Beat of Sponsor Best Practices                                                                                                                                                 |
| Chris Rivera         | The Steady Beat of Sponsor Best Practices                                                                                                                                                 |
| Rita Seghal          | The Steady Beat of Sponsor Best Practices                                                                                                                                                 |
| Erin Scruggs         | The Steady Beat of Sponsor Best Practices<br>QAS™ Self Study, Nano Learning & Blended Learning: The Classics & New Releases of the 2026 Standards<br>Q&A Session with Registry Leadership |
| Amy Tongate          | NASBA Updates<br>Q&A Session with Registry Leadership                                                                                                                                     |
| Carlos Whittaker     | Reconnect                                                                                                                                                                                 |
| Elizabeth Wolfe      | CPE Rules from a Legal Perspective                                                                                                                                                        |
| Madison Word         | Compliance Karaoke: Completing the Lyrics of the Standards<br>The Standards Soundtrack: What Sponsors Need to Know                                                                        |