# AGENDA

2019 Eastern Regional Meeting  
June 11-13 | Washington, DC

## MONDAY, JUNE 10

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>6:00 – 8:00 pm</td>
<td>Dinner for New Accountancy Board Members (and guests)</td>
<td>North Gate Grill (Lobby Level)</td>
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## TUESDAY, JUNE 11

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>8:00 – 9:00 am</td>
<td>New Accountancy Board Member Breakfast</td>
<td>Ohio</td>
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<tr>
<td>9:00 am – 3:00 pm</td>
<td>New Accountancy Board Member Orientation</td>
<td>South American</td>
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<tr>
<td>4:00 – 5:00 pm</td>
<td>Registration</td>
<td>Presidential Ballroom Foyer</td>
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<tr>
<td>6:00 – 8:00 pm</td>
<td>Welcome Reception</td>
<td>Congressional</td>
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## WEDNESDAY, JUNE 12

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<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>7:30 – 8:45 am</td>
<td>Communications Breakfast <em>(All Attendees Welcome)</em></td>
<td>Statler</td>
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<tr>
<td>7:30 – 9:00 am</td>
<td>Breakfast <em>(All Welcome)</em></td>
<td>Congressional</td>
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<tr>
<td>9:00 am – 12:00 pm</td>
<td>General Session - Moderator: Catherine R. Allen</td>
<td>Presidential Ballroom</td>
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<tr>
<td>9:00 – 9:15 am</td>
<td>Welcome from Regional Directors</td>
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<tr>
<td>9:15 – 9:25 am</td>
<td>Welcome to Washington, DC</td>
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<tr>
<td>9:25 – 10:10 am</td>
<td>Update from NASBA Leadership</td>
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<td>10:10 – 10:40 am</td>
<td>Speaking with Gen Z</td>
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<tr>
<td>10:40 – 11:00 am</td>
<td>BREAK</td>
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WEDNESDAY, JUNE 12 (continued)

11:00 am – 12:00 pm  The Evolution of the CPA Profession: Next Steps
Catherine R. Allen, Chair, CPA Evolution Working Group
Daniel J. Dustin, Vice President, State Board Relations, NASBA

12:00 – 1:15 pm  LUNCH (All meeting attendees – Assigned tables)

1:15 – 2:15 pm  General Session - Moderator: Michael Womble

1:15 – 1:45 pm  Adding Experience and Other UAA Projects
J. Coalter Baker, Chair, Uniform Accountancy Act Committee

1:45 – 2:15 pm  The Anti-Regulation Battle: Building the Toolkit
John W. Johnson, Director, Legislative and Governmental Affairs, NASBA
Layle Nelson, Sr. VP Public Affairs, CRAFT Media/Digital LLC

2:15 – 2:30 pm  BREAK

2:30 – 4:30 pm  Meet with Your Region
Great Lakes: Sheldon Holzman, Great Lakes Regional Director
Middle Atlantic: Michael Womble, Middle Atlantic Regional Director
Northeast: Catherine R. Allen, Northeast Regional Director
Southeast: J. Andy Bonner, Southeast Regional Director

(Each Region will meet in a separate room with the Regional Director leading the discussion. Election of Nominating Committee Representatives in Great Lakes and Northeast Regions.)

2:30 – 3:30 pm  Seminar for Other Attendees: Speak Up on Legislation in Your Jurisdiction
Moderator: John W. Johnson

4:30 pm  RECESS

4:45 pm  Call to Leadership Reception

THURSDAY, JUNE 13

7:30 – 8:45 am  Board Presidents’/Chairs’ Breakfast Meeting
Moderator: Janice L. Gray

7:30 – 8:45 am  Board Executive Directors’ Breakfast Meeting
Moderator: Richard C. Carroll, Chair, Executive Directors Committee

7:30 – 9:00 am  Breakfast (All Welcome)

9:00 am – 12:00 pm  General Session - Moderator: Sheldon Holzman

9:00 – 9:15 am  Report from Regional Breakouts
Moderator: Sheldon P. Holzman
Panelists: Regional Directors
THURSDAY, JUNE 13 (continued)

9:15 – 9:45 am  Legal Update
Noel L. Allen, Outside Legal Counsel, NASBA

9:45 – 10:15 am  Reinvigorating the Peer Review Program
James Brackens, Vice President – Ethics & Practice Quality, AICPA

10:15 – 10:45 am  Proposed Peer Review Model
Jack F. Dailey, Jr., Chair, Compliance Assurance Committee
Richard C. Carroll, Chair, Executive Directors Committee

10:45 – 11:00 am  BREAK  Presidential Ballroom Foyer

11:00 – 11:15 am  Report from Examination Review Board
Barbara A. Ley, Chair, Examination Review Board

11:15 am – 12:00 pm  Education Research Reports
Moderator: Wade A. Jewel, Director, NIES and President, AEQUO
Panelists: Dr. Hiu Lam Choy, Drexel University
Dr. Linda J. Matuszewski, Northern Illinois University

12:00 – 1:00 pm  LUNCH (Meeting Attendees Only)  South American

1:00 – 3:30 pm  General Session - Moderator: Andy Bonner  Presidential Ballroom

1:00 – 1:30 pm  Driving CPE Audit Efficiency and CPE Compliance
Maria L. Caldwell, Director, Compliance Services & CLO, NASBA
Erin Buchanan, Sr. Account Manager, CPE Audit Services, NASBA

1:30 – 2:00 pm  Pioneering Tech Change in State Government: Ohio and Bitcoin Project
W. Michael Fritz, Chair, Regulatory Response Committee

2:00 – 2:30 pm  Uniform CPA Examination Developments
Colleen K. Conrad, Executive Vice President & COO, NASBA
Michael A. Decker, Vice President-Examinations, AICPA

2:30 – 3:00 pm  The CPA’s Responsibility for Digital Records
Brenner Allen, Allen & Pinnix
Barry M. Berkowitz, Nominating Committee

3:00 – 3:15 pm  Questions for NASBA Leadership
Janice L. Gray
Ken L. Bishop

3:15 – 3:30 pm  RAFFLE

3:30 pm  ADJOURN

6:30 pm  Celebration  Presidential Ballroom