

NASBA  
112th Annual Meeting  
Boston, Massachusetts  
October 27- 30, 2019

TENTATIVE AGENDA

Sunday, October 27, 2019

---

- 3:00 – 5:00 pm Registration
- 3:30 – 5:30 pm CPT Workshop: Ethical Leadership for the 21<sup>st</sup> Century
- 6:00 – 8:00 pm Welcome Reception

Monday, October 28, 2019

---

- 7:15 – 8:15 am Breakfast (*All Welcome*)

OPENING PLENARY SESSION

- 8:30 – 8:50 am Call to Order and Introductions  
*NASBA Chair Janice L. Gray*
- 8:50 – 9:00 am Welcome to Massachusetts
- 9:00 – 10:00 am Keynote Address: The International Professional  
*Kevin Dancey, CEO, IFAC*
- 10:00 – 10:15 am Report from NASBA Chair 2018-2019 *Janice L. Gray*
- 10:15 -- 10:45 am PCAOB: Regulators and Technology  
*Kathleen Hamm, Board Member - PCAOB*
- 10:45 – 11:00 am BREAK
- 11:00 – 11:15 am Report from AICPA Chair *Bill Reeb*
- 11:15 – 12:00 pm CPA Evolution Task Force: Next Steps  
*Laurie J. Tish, NASBA Vice Chair and Others*

LUNCHEON

- 12:00 – 1:45 pm What's Next in Washington – *Bob Sellers, Columnist*

NASBA  
112th Annual Meeting  
Boston, Massachusetts  
October 27- 30, 2019

TENTATIVE AGENDA

AFTERNOON PLENARY SESSION

- 1:45 – 2:15 p.m. International Signing  
*Representatives of SAICA and ICAEW*
- 2:15 – 2:45 pm Eyes on the Courts  
*Noel L. Allen, Esq.*
- 2:45 – 3:15 pm Uniform Accountancy Act Issues  
*J. Coalter Baker, Chair, NASBA UAA Committee*
- 3:15 – 3:45 pm Update on Uniform CPA Examination Developments  
*Colleen K. Conrad, NASBA Executive Vice President & COO*
- 3:45 pm RECESS
- 4:00 pm CPT Event

**Tuesday, October 29, 2019**

---

- 8:00 – 9:50 am Regional Breakfast Meetings for Board Members and Staff  
*Moderators:*  
Central Region – *Faye D. Miller*  
Great Lakes Region – *Sheldon P. Holzman*  
Middle Atlantic Region – *Michael Womble*  
Mountain Region – *Nicola Neilon*  
Northeast Region – *Catherine R. Allen*  
Pacific Region – *Katrina Salazar*  
Southeast Region – *Andy Bonner*  
Southwest Region – *C. Jack Emmons*
- 8:00 – 9:50 am Breakfast for Other Participants *(All Welcome)*

MORNING PLENARY SESSION

- 10:00 - 11:15 am Annual Business Meeting  
Minutes of 111th Annual Business Meeting  
- *W. Michael Fritz, Secretary*

NASBA  
112th Annual Meeting  
Boston, Massachusetts  
October 27- 30, 2019

TENTATIVE AGENDA

NASBA Awards  
- Telford A. Lodden, Awards Committee Chair  
- Lorraine P. Sachs, NASBA Executive Vice President Emerita  
Elections of NASBA Board members  
- Theodore W. Long, Jr., Nominating Committee Chair  
Bylaws Committee Report  
- Katrina Salazar, Bylaws Committee Chair  
Administration & Finance Committee Report  
- Jimmy E. Burkes, Treasurer  
Audit Committee Report  
- Faye D. Miller, Audit Committee Chair  
Executive Directors  
- Richard C. Carroll, Executive Directors Committee Chair

11:15 – 12:00 President's Report  
- Ken L. Bishop

12:00 – 12:15 First Meeting of 2019-20 NASBA Board of Directors  
(Election of Director-at-Large, Secretary and Treasurer)

LUNCHEON

12:15 – 1:15 pm

AFTERNOON PLENARY SESSION

1:30 – 2:15 pm Inaugural Presentations  
- Thanks – Janice L. Gray, Chair 2018-2019  
- Inaugural Address – Laurie J. Tish, Chair 2019-2020

2:15 – 3:15 pm Innovation and Renewal  
Oren Berkovich, CEO Singularity University

3:15 – 4:00 pm Tax Practice in Digital Times  
Lisa Beard Niemann, IRS Acting Deputy Commissioner, Small Business/Self-Employed Division

4:00 pm RECESS

6:30 pm Celebration at Kennedy Library

NASBA  
112th Annual Meeting  
Boston, Massachusetts  
October 27- 30, 2019

TENTATIVE AGENDA

Wednesday, October 30, 2019

---

- 8:00 – 9:15 am Presidents'/Chairs' Breakfast Meeting  
Moderator: *Laurie J. Tish*
- 8:00 – 9:15 am Executive Directors' and State Board Staff's Breakfast Meeting  
Moderator: *Chair, Executive Directors Committee*
- 8:00 – 9:15 am Breakfast for Professional Society Attendees  
Moderator: *John W. Johnson*
- 8:00 – 9:15 am Breakfast for Other Participants
- MORNING PLENARY SESSION
- 9:30 – 9:50 am APLG and Legislative Trends  
*John W. Johnson, Director of Legislative and Governmental Affairs*
- 9:50 – 10:20 am Speaker to be confirmed
- 10:20- 10:50 am Achieving Diversity  
*Alfonzo Alexander, NASBA Chief Ethics and Diversity Officer*
- 10:50 – 11:00 am Questions for NASBA Leaders  
*Laurie J. Tish and Ken L. Bishop*
- 11:00 – 11:10 am Closing Comments on 2019 Annual Meeting – Invitation to 2020 Annual  
*Laurie J. Tish*
- 11:10 – 11:30 am Raffle
- 11:30 am ADJOURN