Monday, March 16, 2020

AFTERNOON PLENARY SESSION

1:00 – 2:00 pm  
**NASBA Orientation for New Attendees**  
*Dunes Ballroom II-III*

2:00 – 5:00 pm  
**Registration**  
*Dunes Foyer*

6:00 – 8:00 pm  
**Welcome Reception**  
*East Pool Deck*

Tuesday, March 17, 2020

8:00 – 9:00 am  
**Registration**  
*Dunes Foyer*

8:00 – 9:00 am  
**Breakfast** (with Executive Directors & State Society CEOs)  
*Heron*

MORNING PLENARY SESSION

9:00 – 9:15 am  
**Welcome** (with Executive Directors & State Society CEOs)  
*Dunes Ballroom II-III*

  Presiding:  
  Grace Berger, Executive Director  
  Montana Board of Public Accountants

9:15 – 10:00 am  
**NASBA Report** (with Executive Directors & State Society CEOs)  
*Dunes Ballroom II-III*

  Moderator:  
  Grace Berger, Executive Director  
  Montana Board of Public Accountants

  Speakers:  
  Laurie J. Tish, CPA, 2019-2020 Chair  
  NASBA
AGENDA

Ken L. Bishop, President & CEO
NASBA

10:00 – 10:30 am  CPA Evolution (with Executive Directors & State Society CEOs)
Dunes Ballroom II-III

Moderator:  Grace Berger, Executive Director
Montana Board of Public Accountants

Speakers:  Laurie Tish
Washington

10:30 – 10:50 am  Break
Dunes Foyer

10:50 – 11:20 am  Legal Cases and Other Developments Impacting the Profession
(with Executive Directors & State Society CEOs)
Dunes Ballroom II-III

Moderator:  Jovonna Bennett, Executive Director
Rhode Island Board of Accountancy

Speaker:  Noel Allen, Esq.
Outside Legal Counsel, NASBA
Partner, Allen & Pinnix, P.A.

11:20 am – 12:00 pm  Legislative Updates – Impact on State Boards
(with Executive Directors & State Society CEOs)
Dunes Ballroom II-III

Moderator:  Randall A. Ross, CPA, Executive Director
Oklahoma Accountancy Board

Speaker:  John W. Johnson, Director, Legislative & Governmental Affairs
NASBA

LUNCHEON

12:00 – 1:00 pm  Lunch
25th Annual Conference for Board of Accountancy Legal Counsel
Wyndham Grand Clearwater (Clearwater, FL)
March 16-18, 2020
AGENDA

(with Executive Directors & State Society CEOs)
Ocean Hai

1:00 – 1:30 pm
Recognition
(with Executive Directors & State Society CEOs)
Ocean Hai

Presiding: Kent Absec, Executive Director
Idaho State Board of Accountancy

AFTERNOON PLENARY SESSION

1:45 – 2:40 pm
Americans with Disabilities Act Considerations for State Boards: Testing Accommodations and Website Accessibility
Dunes Ballroom IV

Moderator: Elizabeth Wolfe, Esq.
NASBA

Speakers: TBD.

2:40 – 3:00 pm
Break
Dunes Foyer

3:00 – 3:30 pm
Inside Peer Review
Dunes Ballroom IV

Moderator: Elizabeth Wolfe, Esq.
NASBA

Speaker: TBD.

3:30 – 5:00 pm
Roll Call (Legal Only)
Dunes Ballroom IV

Moderator: Elizabeth Wolfe, Esq.
NASBA

5:00 pm
Recess
Wednesday, March 18, 2020

8:00 – 9:00 am  Breakfast (with Executive Directors)
                 Heron

MORNING PLENARY SESSION

9:00 – 10:00 am  Ethics: Duties CPAs Owe to their Clients and the Public; Potential Conflicts
                 Dunes Ballroom IV

                 Moderator:  Elizabeth Wolfe, Esq.
                      NASBA

                 Speaker:  Frank Trainor, Esq.
                        North Carolina Board of Accountancy

10:00 – 10:30 am  Roll Call (Legal Only)
                   Dunes Ballroom IV

                   Moderator:  Elizabeth Wolfe, Esq.
                        NASBA

10:30 – 10:45 am  Break
                   Dunes Foyer

10:45 – 11:30 am  Roll Call (Legal Only)
                   Dunes Ballroom IV

                   Moderators:  Elizabeth Wolfe, Esq.
                                 NASBA

                                 Maria Caldwell, Chief Legal Officer & Director, Compliance Services
                                 NASBA

11:30 am – 12:45 pm  Investigator Tools: Preparing Reports, Performing Investigations, Gathering Evidence and Highlight Cases
                      Dunes Ballroom IV
AGENDA

Moderator: Elizabeth Wolfe, Esq.
NASBA

Panelists: Sharron Waugh, Investigator
Tennessee State Board of Accountancy

Pat Thorne, Investigator
Nevada State Board of Accountancy

LUNCHEON

12:45 – 1:45 pm
Lunch (with Executive Directors)
Ocean Hai

AFTERNOON PLENARY SESSION

2:00 – 3:00 pm
Administrative Proceedings: How to Conduct a Hearing and Tales from the Bench of an Administrative Law Judge
Dunes Ballroom IV

Moderator: Elizabeth Wolfe, Esq.
NASBA

Panelists: TBD.

3:00 – 3:20 pm
Break
Dunes Foyer

3:20 – 4:45 pm
Roll Call (Legal Counsel only)
Dunes Ballroom IV

Moderator: Elizabeth Wolfe, Esq.
NASBA

4:45 – 5:00 pm
Questions and Adjournment
Dunes Ballroom IV

6:30 pm
Closing Celebration

1.7.20