Monday, March 16, 2020

AFTERNOON PLENARY SESSION

1:00 – 2:00 pm    NASBA Orientation & Overview  
                  (New Attendees)  
                  Dunes 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  
                  Heron

                  (with Executive Directors & State Society CEOs)

MORNING PLENARY SESSION

9:00 – 9:10 am    Welcome  
                  (with Executive Directors & State Society CEOs)
                  Dunes II-III

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

9:10 – 9:50 am    NASBA Report  
                  (with Executive Directors & State Society CEOs)
                  Dunes II-III

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

                  Speakers: Laurie J. Tish, CPA,  
                             2019-2020 Chair  
                             NASBA
9:50 – 10:35 am  CPA Evolution  
(with Executive Directors & State Society CEOs)  

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

Speakers: Laurie Tish, CPA  
2019-2020 Chair, NASBA  

10:35 – 10:50 am  Break  

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

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

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

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

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

LUNCHEON

12:00 – 1:30 pm  Recognition Lunch  
Dunes II-III and Ocean Hai

(with Executive Directors & State Society CEOs)

Presiding:  Wade Jewell  
President, Aequo & Director, NIES, NASBA

AFTERNOON PLENARY SESSION

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

Moderator:  Elizabeth Wolfe, Esq.  
NASBA

Speakers:  TBD

2:40 – 3:00 pm  Break  
Dunes Foyer

3:00 – 3:45 pm  Inside Peer Review  
Dunes IV

Moderator:  Elizabeth Wolfe, Esq.  
NASBA

Speaker:  Art Sparks, CPA, CGMA  
Member/Partner, Alexander Thompson Arnold PLLC

3:45 – 4:30 pm  Title TBD – Industry Trends  
Dunes IV

Speaker:  Tom Hood, CPA, CITP, CGMA  
CEO, Maryland Association of CPAs  
CEO & Founder, Business Learning Institute
AGENDA

Moderator: Elizabeth Wolfe, Esq. NASBA

4:30 – 5:00 pm Roll Call (Legal Only)  Dunes 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 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 IV

Moderator: Elizabeth Wolfe, Esq. NASBA

10:30 – 10:45 am Break  Dunes Foyer

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

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 IV*

Moderator: Elizabeth Wolfe, Esq.
NASBA

Panelists: Sharron Waugh, CPA, Investigator
Tennessee State Board of Accountancy
Pat Thorne, CPA, Investigator
Nevada State Board of Accountancy

LUNCHEON

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

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 IV*

Moderator: Elizabeth Wolfe, Esq.
NASBA

Panelists: Mary Ellen Clark, Senior Attorney
Office of the State Courts Administrator,
Florida Supreme Court
### AGENDA

Judge Lynne A. Quimby-Pennock, Administrative Law Judge  
Florida Division of Administrative Hearings

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>3:00 – 3:20 pm</td>
<td>Break</td>
<td>Dunes Foyer</td>
</tr>
<tr>
<td>3:20 – 4:45 pm</td>
<td>Roll Call (Legal Counsel only)</td>
<td>Dunes IV</td>
</tr>
<tr>
<td></td>
<td>Moderator: Elizabeth Wolfe, Esq. NASBA</td>
<td></td>
</tr>
<tr>
<td>4:45 – 5:00 pm</td>
<td>Questions and Adjournment</td>
<td>Dunes IV</td>
</tr>
<tr>
<td>6:30 pm</td>
<td>Closing Celebration</td>
<td></td>
</tr>
</tbody>
</table>