

36TH ANNUAL CONFERENCE FOR EXECUTIVE DIRECTORS AND BOARD STAFF

March 13-15, 2018

Destin, FL

AGENDA

Tuesday, March 13, 2018

- 9:00 am – 12:00 pm **Executive Directors Committee Meeting – Pelican**
(Committee Members Only)
- 9:00 am – 12:00 pm **State Society Relations Committee Meeting – Heron**
(Committee Members Only)
- 12:00 – 1:00 pm **Joint Lunch – ED and State Society Relations Committees – Sandpiper B**
(Committee Members Only)
- 1:00 – 2:00 pm **Registration - Emerald Registration Booth**
- 2:00 – 2:15 pm **Welcome – Emerald Ballroom C**
- Presiding: Randy Ross, CPA, Executive Director
Oklahoma Accountancy Board
- Stephanie Peters, President & CEO
Virginia Society of CPAs
- 2:15 – 3:00 pm **Peer Review Update - Emerald Ballroom C**
(with State Society CEO's)
- Moderator: Randy Ross, CPA, Executive Director
Oklahoma Accountancy Board
- Panel: Wendy Garvin, Executive Director
Tennessee State Board of Accountancy
- Todd Shapiro, President & CEO
Illinois CPA Society
- Beth Thoresen, Peer Review Operations Director

AICPA

3:00 – 3:45 pm **Uniform CPA Examination Updates - Emerald Ballroom C**
(with State Society CEO's)

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

Speakers: Colleen Conrad, CPA, Executive Vice President & COO
NASBA

Michael Decker, Vice President, Examinations Team
AICPA

Kimberly Farace, Director, Account Management
Prometric

3:45 – 4:15 pm **Break – Emerald Ballroom Foyer**

4:15 – 5:00 pm **Other Issues Impacting the Profession – State Board and Society
Relations - Emerald Ballroom C**
(with State Society CEO's) (Closed Discussion)

Moderators: Randy Ross, CPA, Executive Director
Oklahoma Accountancy Board

Stephanie Peters, President & CEO
Virginia Society of CPAs

5:00 pm **Recess**

6:00 – 8:00 pm **Welcome Reception – Barefoots Deck**

Wednesday, March 14, 2018

8:00 – 9:00 am **Breakfast – Coastal B**
(with Legal Counsel & State Society CEO's)

9:00 – 9:15 am **Welcome – Emerald Ballroom C**
(with Legal Counsel & State Society CEO's)

Presiding: Randy Ross, CPA, Executive Director
Oklahoma Accountancy Board

9:15 – 10:00 am **NASBA Report - Emerald Ballroom C**
(with Legal Counsel & State Society CEO's)

Moderator: Randy Ross, CPA, Executive Director
Oklahoma Accountancy Board

Speakers: Ted Long, CPA, Chair
NASBA

Ken L. Bishop, President & CEO
NASBA

10:00 – 10:30 am **The Legal Implications of Boards of Accountancy Restricting Titles and Designations - Emerald Ballroom C**
(with Legal Counsel & State Society CEO's)

Moderator: Wade A. Jewell, Executive Director
Virginia Board of Accountancy

Speakers: Matthew P. Boshier, Esq., Chair
Virginia Board of Accountancy

10:30 – 11:00 am **Break – Emerald Ballroom Foyer**

11:00 – 11:30 am **Legal Cases and Other Developments Impacting the Profession - Emerald Ballroom C**
(with Legal Counsel & State Society CEO's)

Moderator: Richard C. Carroll, Esq., Executive Director
Kentucky State Board of Accountancy

Speaker: Noel Allen, Esq.
Allen & Pinnix, P.A.

11:30 – 12:00 pm **Legislative Updates – Impact on State Boards - Emerald Ballroom C**
(with Legal Counsel & State Society CEO's)

Moderator: Richard C. Carroll, Esq., Executive Director
Kentucky State Board of Accountancy

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

12:00 – 1:30 pm **Recognition Lunch – Coastal B**
(with Legal Counsel & State Society CEO's)

Presiding: Wade Jewell, Executive Director
Virginia Board of Accountancy

Kent Absec, Executive Director

Idaho State Board of Accountancy

1:45 - 2:15 pm **Emerging Legislative & Legal Issues - Emerald Ballroom C**

Speaker: Nathan Standley, Esq.
Allen & Pinnix, P.A.

2:15 – 2:45 pm **Break – Emerald Ballroom Foyer**

2:45 – 3:15 pm **CPE Tracking, Mobility, Issues – Emerald Ballroom C**

Moderator: Pamela Ivey, Executive Director
Wyoming Board of Certified Public Accountants

Panel: Randy Ross, CPA, Executive Director
Oklahoma Accountancy Board

Blaine Peterson, President & CEO
Oklahoma Society of CPA's

Brenda Turley, Executive Director
West Virginia Board of Accountancy

3:30 – 5:00 pm **Open Discussion Topics – Emerald Ballroom C**
(with Board EDs & Staff) (Closed Session)

Moderator: Randy Ross, CPA, Executive Director
Oklahoma Accountancy Board

5:00 pm **Recess**

Thursday, March 15, 2018

8:00 – 9:00 am **Breakfast – Coastal B**
(with Legal Counsel)

9:00 – 10:00 am **Ethical Leadership – Fostering an Ethical Decision-Making Culture – Emerald Ballroom C**

Discussion Leader: Wade A. Jewell, Executive Director
Virginia Board of Accountancy

Speakers: Dr. Bill Hawk, Chair, Ethical Reasoning in Action: Madison Collaborative, James Madison University

10:00 – 10:30 am **Trending Issues: Watchlist in the Profession - Emerald Ballroom C**

Moderator: Wade Jewell, Executive Director
Virginia Board of Accountancy

Speakers: Colleen Conrad, CPA, Executive Vice President & COO
NASBA

Randy Ross, CPA, Executive Director
Oklahoma Accountancy Board

Daniel Dustin, CPA, Vice President of State Board Relations
NASBA

10:30 – 11:00 am **Break – Emerald Ballroom Foyer**

11:00 – 11:30 am **Gateway Demo - Emerald Ballroom C**

Moderator: Pamela Ivey, Executive Director
Wyoming Board of Certified Public Accountants

Speaker: Chris Mays, Associate Director
Client Services, NASBA

11:30 - 12:15 pm **Panel Discussion on Existing Licensing/Database Systems/Issues – Emerald Ballroom C**

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

Panel: Wade Jewell, Executive Director
Virginia Board of Accountancy

Pamela Ivey, Executive Director
Wyoming Board of Certified Public Accountants

Brenda Turley, Executive Director
West Virginia Board of Accountancy

12:15 – 1:15 pm **Lunch – Coastal B**
(with Legal Counsel)

1:30 – 2:00 pm **ALD Discussion: Captured Information Usage - Emerald Ballroom C**

Moderator: Brenda Turley, Executive Director
West Virginia Board of Accountancy

Speakers: Boyd Busby, CPA, Executive Director
Alabama State Board of Public Accountancy

Rebecca Gebhardt, Associate Director, Regulatory
Compliance Programs, NASBA

2:00 – 2:30 pm

Education Updates - Emerald Ballroom C

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

Speakers: Patricia Hartman, Director of Client Services
NASBA

2:30 – 3:00 pm

Break – Emerald Ballroom Foyer

3:00 – 4:00 pm

Breakout Sessions
(Closed Sessions)

Executive Directors (only) – Emerald Ballroom B

Moderator: Randy Ross, CPA, Executive Director
Oklahoma Accountancy Board

Board Staff (only) – Emerald Ballroom A

Moderator: Colin Autin, Deputy Director
Oklahoma Accountancy Board

4:00 – 5:00 pm

**Q & A Session with NASBA Leadership, Executive Directors only -
Emerald Ballroom B**
(Closed Session)

Presiding: Randy Ross, CPA, Executive Director
Oklahoma Accountancy Board

5:00 pm

Adjourn

6:30 pm

Closing Celebration – Barefoots Deck

Friday, March 16, 2018

9:00 am – 12:00 pm **Executive Directors Committee Meeting - Boardroom**
(Committee Members Only)

DRAFT