

The NASBA logo is displayed in a large, white, serif font against a background of a desert landscape at sunset. The landscape features a prominent butte in the foreground and another smaller one in the distance, with the sun low on the horizon creating a warm, golden glow.

# 31 ST ANNUAL CONFERENCE FOR EXECUTIVE DIRECTORS AND STATE BOARD STAFF

MARCH 3-6, 2013 TUCSON, ARIZONA

## AGENDA

### SATURDAY, MARCH 2, 2013

10 am – 5 pm **EXECUTIVE DIRECTORS COMMITTEE MEETING** - Executive Boardroom 2  
(Committee Members Only)

### SUNDAY, MARCH 3, 2013

1:00 – 2:00 pm **REGISTRATION** - Tucson Registration

2:00 – 3:30 pm **ROLL CALL OF STATES** - Tucson E - F  
**Moderator: Nicole Kasin**  
Executive Director, South Dakota Board of Accountancy

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3:30 – 4:00 pm **BREAK** - Tucson Foyer

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4:00 – 5:00 pm **ROLL CALL OF STATES** (continued) - Tucson E - F  
**Moderator: Nicole Kasin**  
Executive Director, South Dakota Board of Accountancy

6:00 pm **WELCOME RECEPTION** - Tash Lawn

### MONDAY, MARCH 4, 2013

8:00 – 9:30 am **TABLE TOPICS BREAKFAST**  
**Board Effectiveness & Relationships** - Tucson J  
**Discussion Leader: Jimmy Corley**  
Executive Director, Arkansas State Board of Accountancy  
**Investigative & Enforcement Resources** - Tucson I  
**Discussion Leader: Pamela Ives-Hill, CPA**  
Executive Director, Missouri State Board of Accountancy  
**EDs and the Exam: Working Together** - Tucson H  
**Discussion Leader: Ofelia Duran**  
Executive Director, Colorado State Board of Accountancy

9:30 – 9:45 am **WELCOME** (with Legal Counsel) - Tucson E - F  
**Presiding: Nicole Kasin**  
Executive Director, South Dakota Board of Accountancy

9:45 – 10:15 am **NASBA REPORT** (with Legal Counsel)  
**Moderator: Nicole Kasin**  
Executive Director, South Dakota Board of Accountancy  
**Speakers: Gaylen Hansen, CPA**  
Chair, NASBA  
**Ken L. Bishop**  
President & CEO, NASBA

**MONDAY, MARCH 4, 2013** (continued)

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10:15 – 10:30 am	<b>BREAK</b> - <i>Tucson Foyer</i>
10:30 – 11:00 am	<b>IDENTITY THEFT</b> <b>Moderator: Dave Sanford</b> Executive Director, Guam Board of Accountancy <b>Speakers: Deborah Curry, CPA</b> CEO, Florida Institute of CPAs <b>Justin Thames</b> Governmental Affairs Manager, Florida Institute of CPAs
11:00 – 11:30 am	<b>CPA TAX EXPERTS</b> <b>Moderator: Mark Crocker, CPA</b> Executive Director, Tennessee State Board of Public Accountancy <b>Speakers: Noel Allen, Esq.</b> Legal Counsel, NASBA
11:30 am – 12:00 pm	<b>LEGISLATIVE UPDATE</b> - <i>Tucson E - F</i> <b>Moderator: Dave Sanford, CPA</b> Executive Director, Guam Board of Public Accountancy <b>Speaker: John Johnson</b> Director, Legislative and Governmental Affairs, NASBA
12:00 – 1:30 pm	<b>BUSINESS LUNCHEON – SAY IT SO THEY LISTEN</b> - <i>Tucson G - J</i> <b>Speaker: Schatzie Brunner</b> Former CNN Anchor & Presentation Coach
1:30 – 2:00 pm	<b>UPDATE ON ADMINISTRATION OF CPA EXAMINATION</b> - <i>Tucson E - F</i> <b>Moderator: James Corley</b> Executive Director, Arkansas State Board of Public Accountancy <b>Speakers: Michael Decker</b> Director of Operations and Development Examination Team, AICPA <b>Kimberly Farace</b> Senior Client Services Manager, Prometric <b>Patricia Hartman</b> Director of Client Services, NASBA
2:00 – 2:30 pm	<b>OVERVIEW OF CANDIDATE PERFORMANCE</b> <b>Moderator: Russ Friedewald</b> Executive Director, Illinois Board of Examiners <b>Speaker: James Suh</b> Director of Continuous Improvement and Analytics, NASBA
2:30 – 3:00 pm	<b>NASBA COMMUNICATIONS &amp; OUTREACH ASSISTANCE</b> <b>Moderator: Russ Friedewald</b> Executive Director, Illinois Board of Examiners <b>Speaker: Tom Kenny</b> Director of Communications, NASBA
3:00 – 3:30 pm	<b>PEEC</b> <b>Moderator: Dave Sanford, CPA</b> Executive Director, Guam Board of Public Accountancy <b>Speakers: Ellen Gorla, CPA</b> Senior Manager, Independence and Special Projects, Professional Ethics Division, AICPA <b>Lisa Snyder, CPA, CGMA</b> Director, Professional Ethics Division, AICPA
3:30 – 3:45 pm	<b>BREAK</b> - <i>Tucson Foyer</i>

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**MONDAY, MARCH 4, 2013** (continued)

- 3:45 – 4:30 pm      **CODIFICATION OF THE AICPA CODE**  
**Moderator: Dave Sanford, CPA**  
Executive Director, Guam Board of Accountancy  
**Speakers: Ellen Gorla, CPA**  
Senior Manager, Independence and Special Projects, Professional Ethics Division, AICPA  
**Lisa Snyder, CPA, CGMA**  
Director, Professional Ethics Division, AICPA
- 4:30 – 5:00 pm      **ROLL CALL OF STATES** (continued) - *Tucson E - F*  
**Moderator: Nicole Kasin**  
Executive Director, South Dakota Board of Accountancy
- 5:00 pm              **RECESS**

**TUESDAY, MARCH 5, 2013**

- 8:00 – 9:30 am      **TABLE TOPICS BREAKFAST** (continued from Monday) - *Tucson H, I & J*
- 9:30 – 10:00 am    **FOREIGN CREDENTIAL EVALUATIONS STANDARDS & PROCESSES** - *Tucson E - F*  
**Moderator: Doris Cubitt, CPA**  
Executive Director, South Carolina Board of Accountancy  
**Speakers: Richard Sweeney, CPA**  
Executive Director, Washington State Board of Accountancy  
**Brentni Henderson-King**  
Manager, NASBA International Credential Evaluation Services
- 10:00 – 10:30 am    **EXAMINATION REVIEW BOARD**  
**Moderator: Doris Cubitt, CPA**  
Executive Director, South Carolina Board of Accountancy  
**Speaker: Onita Porter, CPA**  
Director, Examination Review Board
- 10:30 – 11:00 am    **CIVIL LITIGATION**  
**Moderator: Ofelia Duran**  
Executive Director, Colorado State Board of Accountancy  
**Speakers: Noel Allen, Esq.**  
Legal Counsel, NASBA
- 11:00 – 11:30 am    **NASBA'S STRATEGIC MISSION**  
**Moderator: Wade Jewell**  
Executive Director, Virginia Board of Accountancy  
**Speaker: Ed Barnicott**  
Vice President, Strategic Initiatives and Project Management, NASBA
- 11:30 am – 1:00 pm   **RECOGNITION LUNCH** - *Tucson A - C*  
**Presiding: Mark Crocker, CPA**  
Executive Director, Tennessee State Board of Accountancy
- 1:00 – 1:30 pm      **REPORT FROM LEGAL COUNSEL** - *Tucson E - F*  
**Moderator: Nicole Kasin**  
Executive Director, South Dakota Board of Accountancy  
**Speaker: Stacey Grooms**  
Manager Regulatory Affairs, NASBA
- 1:30 – 5:00 pm      **BREAKOUT SESSIONS**  
*Executive Directors only - Tucson E - F*  
**Moderator: Nicole Kasin**  
Executive Director, South Dakota Board of Accountancy  
*Board Staff only - Tucson J*  
**Moderator: Lisa Zolman**  
Washington State Board of Accountancy

**TUESDAY, MARCH 5, 2013** (continued)

- 5:00 pm **RECESS**
- 6:30 – 7:15 pm **DENIM ‘N DIAMONDS RECEPTION** - *San Ignacio & San Xavier*
- 7:15 pm **GALA: DENIM ‘N DIAMONDS: AN EVENING IN THE OLD WEST** - *Tucson E - F*

**WEDNESDAY, MARCH 6, 2013**

- 7:30 – 8:30 am **BREAKFAST** - *Tucson A - B*
- 8:30 – 9:00 am **REPORT FROM TABLE TOPICS** - *Tucson E - F*  
**Presiding: Nicole Kasin**  
Executive Director, South Dakota Board of Accountancy
- 9:00 – 9:30 am **COMMITTEE UPDATES**  
**Moderator: Wade Jewell**  
Executive Director, Virginia State Board of Accountancy  
**Speakers: Pamela Ives-Hill, CPA**  
Executive Director, Missouri State Board of Accountancy  
**Richard Sweeney, CPA**  
Executive Director, Washington State Board of Accountancy
- 9:30 – 10:15 am **DEPARTMENT OF LABOR**  
**Moderator: Doris Cubitt**  
Executive Director, South Carolina Board of Accountancy  
**Speaker: Ian Dingwall**  
Chief Accountant, U. S. Department of Labor
- 10:15 – 10:30 am **BREAK** - *Tucson Foyer*
- 10:30 – 11:15 am **OPERATIONAL TIPS & IDEAS** - *Tucson E - F*  
**Moderator: Russ Friedewald**  
Executive Director, Illinois Board of Examiners  
**Speakers: Viki Windfelt**  
Executive Director, Nevada State Board of Accountancy  
**Pamela Ives-Hill, CPA**  
Executive Director, Missouri State Board of Accountancy
- 11:15 – 11:30 am **REPORT TO NASBA LEADERSHIP**  
**Presiding: Nicole Kasin**  
Executive Director, South Dakota Board of Accountancy
- 11:30 am **ADJOURN**
- 11:45 am – 2:30 pm **EXECUTIVE DIRECTORS COMMITTEE MEETING** - *Executive Boardroom 2*  
(Committee Members Only)



