

# AGENDA

## TUESDAY, MARCH 15, 2016

9:00 am - 1:00 pm	<b>Executive Directors Committee Meeting</b> <i>(Committee Members Only)</i>	Boardroom 2
9:00 am - 1:00 pm	<b>State Society Relations Committee Meeting</b> <i>(Committee Members Only)</i>	Boardroom 1
1:00 - 2:00 pm	<b>Registration</b>	Tucson Grand Foyer
2:00 - 2:15 pm	<b>Welcome</b> <i>(with Legal Counsel and State Society CEOs)</i> Presiding: <b>James Corley, CPA</b> Executive Director, Arkansas State Board of Public Accountancy <b>Ralph A. Thomas, CGMA</b> CEO and Executive Director, New Jersey Society of CPAs	Tucson Salon E
2:15 - 3:00 pm	<b>NASBA Report</b> <i>(with Legal Counsel and State Society CEOs)</i> Moderator: <b>James Corley, CPA</b> Executive Director, Arkansas State Board of Public Accountancy Speakers: <b>Donald H. Burkett, CPA</b> Chair, NASBA <b>Ken L. Bishop</b> President and Chief Executive Officer, NASBA	Tucson Salon E
3:00 - 4:00 pm	<b>Legal Cases and Other Developments</b> <b>Impacting the Profession</b> <i>(with Legal Counsel and State Society CEOs)</i> Moderator: <b>James Corley, CPA</b> Executive Director, Arkansas State Board of Public Accountancy Speakers: <b>Noel L. Allen, Esq.</b> NASBA Legal Counsel, Allen & Pinnix, P.A. <b>Nathan Standley, Esq.</b> Allen & Pinnix, P.A. <b>Brenner Allen, Esq.</b> Allen & Pinnix, P.A.	Tucson Salon E
4:00 - 4:15 pm	<b>Break</b>	Tucson Foyer

### AGENDA

4:15 – 4:45 pm **Diversity – Building the Profession** Tucson Salon E  
*(with State Society CEOs)*  
**Moderator:** **Richard C. Carroll, Esq.**  
Executive Director, Kentucky State Board of Accountancy  
**Speakers:** **Boyd E. Search, MBA, CAE**  
Chief Executive Officer, Georgia Society of CPAs  
**Alfonzo Alexander**  
Chief Relationship Officer, NASBA; President, NASBA Center for the Public Trust

4:45 pm **Recess**

6:00 – 8:00 pm **Welcome Reception** Tash Lawn  
*Special Thanks to AICPA*

### WEDNESDAY, MARCH 16, 2016

8:00 – 9:00 am **Breakfast** Tucson Salon D  
*(with State Society CEOs)*

9:00 – 9:45 am **Legislative Strategies (with State Society CEOs)** Tucson Salon E  
**Moderator:** **Richard C. Carroll, Esq.**  
Executive Director, Kentucky State Board of Accountancy  
**Speakers:** **John W. Johnson**  
Director, Legislative & Governmental Affairs, NASBA  
**Mat Young**  
Vice President, State Regulatory and Legislative Affairs, AICPA

9:45 – 10:45 am **Uniform CPA Examination Update – Practice Analysis Results** Tucson Salon E  
*(with State Society CEOs)*  
**Moderator:** **Russ Friedewald**  
Executive Director, Illinois Board of Examiners  
**Speakers:** **Colleen K. Conrad, CPA**  
Executive Vice President and Chief Operating Officer, NASBA  
**Michael A. Decker**  
Vice President, Examinations, AICPA

10:45 – 11:00 am **Break** Tucson Foyer

### AGENDA

11:00 – 11:30 am **Peer Review – Improvements in Practice Monitoring (with State Society CEOs)** Tucson Salon E

**Moderator:** **Pamela Ivey**  
Executive Director, Wyoming Board of Accountancy

**Speakers:** **Todd Shapiro**  
Peer Review Board, President & Chief Executive Officer, Illinois CPA Society

**Stephanie Peters, CAE**  
Chief Executive Officer, Virginia Society of CPAs

**Beth Thoresen**  
Operations Director, AICPA

11:30 am – 12:00 pm **Recommendations for Pass with Deficiencies and Fail Peer Review Reports (with State Society CEOs)** Tucson Salon E

**Moderator:** **Pamela Ivey**  
Executive Director, Wyoming Board of Accountancy

**Speakers:** **Randall A. Ross, MBA, CPA**  
Executive Director, Oklahoma Accountancy Board

**Wendy S. Garvin**  
Executive Director, Tennessee State Board of Accountancy

12:00 – 1:30 pm **Lunch** Ania Terrace

1:30 pm **Adjourn Joint Sessions with State Society CEOs**

1:30 – 2:20 pm **Breakout Sessions**  
**Leveraging Data for More Effective Enforcement** Tucson Salon B

**Moderator:** **Ofelia Duran**  
Executive Director, Colorado State Board of Accountancy

**Speakers:** **Grace Berger**  
Executive Director, Montana Board of Public Accountants

**Viki A. Windfeldt**  
Executive Director, Nevada State Board of Accountancy

**Elizabeth Stanton**  
Manager, Accountancy Licensee Database, NASBA

**Leadership Training – Engaging Your Board** Tucson Salon D

**Moderator:** **Wade Jewell**  
Executive Director, Virginia Board of Accountancy

**Speakers:** **Alfonzo Alexander**  
Chief Relationship Officer, NASBA; President, NASBA Center for the Public Trust

**Stephanie S. Saunders, CPA**  
Chair, Virginia Board of Accountancy

### AGENDA

2:30 – 3:20 pm

#### Breakout Sessions

##### Leveraging Data for More Effective Enforcement

Tucson Salon B

**Moderator:** Ofelia Duran

Executive Director, Colorado State Board of Accountancy

**Speakers:** Grace Berger

Executive Director, Montana Board of Public Accountants

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Elizabeth Stanton

Manager, Accountancy Licensee Database, NASBA

##### Leadership Training – Engaging Your Board

Tucson Salon D

**Moderator:** Wade Jewell

Executive Director, Virginia Board of Accountancy

**Speakers:** Alfonzo Alexander

Chief Relationship Officer, NASBA; President, NASBA Center for the Public Trust

Stephanie S. Saunders, CPA

Chair, Virginia Board of Accountancy

3:30 – 3:45 pm

#### Break

Tucson Foyer

3:45 – 5:00 pm

#### Regional Breakouts

Region 1

San Xavier

Region 2

Tucson Salon B

Region 3

Tucson Salon D

Region 4

San Louis 2

5:00 pm

#### Recess

### THURSDAY, MARCH 17, 2016

8:00 – 9:00 am

#### Breakfast

Tucson Salon D

9:00 – 10:00 am

#### Education and Accreditation

Tucson Salon E

**Moderator:** Russ Friedewald

Executive Director, Illinois Board of Examiners

**Speaker:** Brentni Henderson

Associate Director, Business Development & Research, NASBA

### AGENDA

10:00 – 10:15 am	<b>State Board Relations Update</b> <b>Moderator:</b> Thomas DeGroot, CPA Executive Director, Missouri Board of Accountancy <b>Speakers:</b> Daniel J. Dustin, CPA Vice President, State Board Relations, NASBA	Tucson Salon E
10:15 – 10:30 am	<b>Q &amp; A Session from Roll Call Materials/ New EDs</b> <b>Moderator:</b> James Corley, CPA Executive Director, Arkansas State Board of Public Accountancy	Tucson Salon E
10:30 – 10:45 am	<b>CPE Standards Exposure Draft Update</b> <b>Moderator:</b> David N. Sanford, CPA Executive Director, Guam Board of Accountancy <b>Speakers:</b> Jessica Luttrull, CPA Associate Director, National Registry, NASBA	Tucson Salon E
10:45 – 11:00 am	<b>Break</b>	Tucson Foyer
11:00 – 12:00 pm	<b>AICPA CGMA Initiative</b> <b>Moderator:</b> David N. Sanford, CPA Executive Director, Guam Board of Accountancy <b>Speakers:</b> Robert N. Brooks Executive Director, North Carolina Board of Accountancy Susan Coffey, CPA, CGMA Senior Vice President, Public Practice and Global Alliances, AICPA Colleen K. Conrad, CPA Executive Vice President and Chief Operating Officer, NASBA	Tucson Salon E
12:00 – 1:15 pm	<b>Recognition Lunch</b> <b>Presiding:</b> Wade Jewell Executive Director, Virginia Board of Accountancy Kent Absec Executive Director, Idaho State Board of Accountancy	Tucson Salon D
1:15 – 1:30 pm	<b>Report from Legal Counsel</b> <b>Moderator:</b> James Corley, CPA Executive Director, Arkansas State Board of Public Accountancy <b>Speaker:</b> Stacey L. Grooms, Esq. Manager, Regulatory Affairs, NASBA	Tucson Salon E

### AGENDA

1:45 - 2:30 pm	<b>Breakout Sessions (Closed Session)</b> <b>Executive Directors Only</b> Moderator: <b>James Corley, CPA</b> Executive Director, Arkansas State Board of Public Accountancy  <b>Board Staff Only</b> Moderator: <b>Tim Montgomery, CPA</b> Investigator, Arkansas State Board of Public Accountancy	San Luis 1-2
2:30 - 2:45 pm	<b>Break</b>	Tucson Foyer
2:45 - 4:30 pm	<b>Breakout Sessions (Closed Sessions)</b> <b>Executive Directors Only</b> Moderator: <b>James Corley, CPA</b> Executive Director, Arkansas State Board of Public Accountancy  <b>Board Staff Only</b> Moderator: <b>Tim Montgomery, CPA</b> Investigator, Arkansas State Board of Public Accountancy	San Luis 1-2
4:30 - 5:00 pm	<b>Q &amp; A Session with NASBA Leadership (Closed Session)</b> Presiding: <b>James Corley, CPA</b> Executive Director, Arkansas State Board of Public Accountancy	Tucson Salon E
5:00 pm	<b>Adjourn</b>	
6:30 pm	<b>Closing Celebration</b> <i>Special Thanks to Prometric</i>	Tucson Salon D

### FRIDAY, MARCH 18, 2016

8:00 am - 12:00 pm	<b>Executive Directors Committee Meeting</b> <i>(Committee Members Only)</i>	San Luis 1
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