

Legal Counsel Virtual Conference

April 12-14, 2021

Agenda

MONDAY, APRIL 12, 2021

All times are central time zone

- | | | |
|-------------------------|--|--|
| 12:00 – 12:15 pm | Welcome
Presiding: | (All of Monday will be Joint Sessions using the ED link)
Kent Absec, Executive Director
Idaho State Board of Accountancy |
| 12:15 – 12:45 pm | NASBA Report
Speakers: | Carlos Barrera, CPA, 2020-2021 Chair
NASBA
Ken L. Bishop, President & CEO
NASBA |
| 12:45 – 1:15 pm | Legislative Update/Anti-Regulation & ARPL
Speakers: | John Johnson Director, Legislative and Governmental Affairs
NASBA
Marta Zaniewski, Vice President, State Regulatory and Legislative Affairs
AICPA |
| 1:15 – 1:30 pm | Break | |
| 1:30 – 2:30 pm | Succession Planning for CPA Firms
Speakers: | Bill Pirolli, Vice Chair
AICPA
David Nance, Deputy Director
North Carolina State Board of CPA Examiners
Jim R. Titus, Esq., Legal Counsel
Nebraska State Board of Public Accountancy |
| 2:30 – 3:15 pm | Investigations
Speaker: | Peter DelVecchia, CPA
Peter DelVecchia, CPA, PLLC |
| 3:15 – 3:30 pm | Break | |

MONDAY, APRIL 12, 2021 continued

All times are central time zone

3:30 – 4:00 pm

Disciplinary Action

Speakers: **Frank Trainor, Esq., Staff Attorney**
North Carolina State Board of CPA Examiners
Taylor Shahon, Investigator
Washington State Board of Accountancy

4:00 – 4:30 pm

Legal Cases and Other Developments Impacting the Profession

Speaker: **Elizabeth Wolfe, Esq., Regulatory Counsel**
NASBA

TUESDAY, APRIL 13, 2021

10:00 – 11:00 am

Digital Accessibility: A Civil Right for Disabled Test-takers and Others in the CPA Community (Will begin using ED Link for Joint Sessions)

Speaker: **Lainey Feingold, Esq.**
Law Office of Lainey Feingold
Author, *Structured Negotiations: A Winning Alternative to Lawsuits*

11:00 – 11:45 am

CPA Examination Update (Joint Session ED Link)

Speakers: **Colleen Conrad, CPA, Executive Vice President & COO**
NASBA
Michael Decker, Vice President, Examinations
AICPA

11:45 am – 12:00 pm

Break

12:00 – 12:45 pm

CPA Evolution (Joint Session ED Link)

Speakers: **Daniel J. Dustin, CPA, Vice President, State Board Relations**
NASBA
Carl Mayes, Senior Technical Manager
AICPA

12:45 – 1:15 pm

Ramifications of Waiving Requirements Due to Emergency/COVID-19 (Joint Session ED Link)

Speakers: **John Patterson, Esq., Executive Director**
Accountancy Board of Ohio
Jennifer Nelson, Executive Director
Wyoming Board of CPAs
Russ Friedewald, Executive Director
Illinois Board of Examiners

1:15 – 1:45 pm

Break

1:45 – 2:45 pm

IRS Office of Professional Responsibility Session (Ethics)

(Begin Legal Link)
Speaker: **Sharyn M. Fisk, Director, Office of Professional Responsibility**
Internal Revenue Service

TUESDAY, APRIL 13, 2021 continued

All times are central time zone

2:45 – 3:45 pm

Lawyer Well-Being Session (Legal Link)

Speaker: **Bree Buchanan, Esq., Senior Advisor**
Krill Strategies, LLC

3:45 – 5:00 pm

Roll Call (Legal Only)

Moderators: **Elizabeth Wolfe, Esq., Regulatory Counsel**
NASBA

**Maria L. Caldwell, Esq., Chief Legal Officer and
Director, Compliance Services**
NASBA

WEDNESDAY, APRIL 14, 2021

10:00 – 11:00 am

Roll Call (Legal Only - Legal Link)

Moderators: **Elizabeth Wolfe, Esq., Regulatory Counsel**
NASBA

**Maria Caldwell, Esq., Chief Legal Officer and
Director, Compliance Services**
NASBA

11:00 am – 12:00 pm

Government by Algorithm: Artificial Intelligence in Federal Administrative Agencies (Executive Directors and Board Staff are invited to attend this Legal Conference session.)

Speaker: **Professor Catherine M. Sharkey**
Segal Family Professor of Regulatory Law and Policy
New York University School of Law

.....
12:00 – 12:30 pm

Break
.....

12:30 – 1:00 pm

Roll Call (Legal Only - Legal Link)

Moderators: **Elizabeth Wolfe, Esq., Regulatory Counsel**
NASBA

**Maria Caldwell, Esq., Chief Legal Officer and
Director, Compliance Services**
NASBA

1:00 – 2:00 pm

Administrative Proceedings: Order Preparation and Deliberation

(Executive Directors and Board Staff are invited to attend this Legal Conference session.)

Speaker: **Judge Steve Darnell, Administrative Law Judge**
State of Tennessee, Administrative Hearings Division

.....
2:00 – 2:15 pm

Break
.....

2:15 – 3:30 pm

Roll Call/Q&A/Wrap Up/Adjourn (Legal Counsel only)

Moderators: **Elizabeth Wolfe, Esq., Regulatory Counsel**
NASBA

**Maria L. Caldwell, Esq., Chief Legal Officer and
Director, Compliance Services**
NASBA