Agenda

SUNDAY, OCTOBER 30, 2022

3:00 - 5:00 p.m.  Registration  Coronado Foyer – 4th Floor | Harbor Tower

4:00 - 5:30 p.m.  CPT Workshop  Harbor GH – 2nd Floor | Harbor Tower
   Ethical Leadership: Influencing with Integrity
   Alfonzo Alexander
   President, NASBA CPT

6:00 - 8:00 p.m.  Welcome Reception  4th Floor Pool Deck

MONDAY, OCTOBER 31, 2022

7:45 - 8:45 a.m.  Breakfast (All Welcome)  Harbor Ballroom ABC – 2nd Floor | Harbor Tower

9:00 - 9:20 a.m.  Call to Order and Introductions  Coronado Ballroom – 4th Floor | Harbor Tower
   W. Michael Fritz, CPA
   2021-2022 Chair, NASBA

9:20 - 9:30 a.m.  Welcome to California  Coronado Ballroom – 4th Floor | Harbor Tower
   Michael Savoy, CPA
   President, California Board of Accountancy

9:30 - 10:15 a.m.  CAQ’s Bold Ambition and Talent Pipeline Initiatives  Coronado Ballroom – 4th Floor | Harbor Tower
   Liz Barentzen, ESQ
   VP, Operations and Talent Initiatives, Center for Audit Quality

10:15 - 10:30 a.m.  Report from NASBA Chair  Coronado Ballroom – 4th Floor | Harbor Tower
   W. Michael Fritz, CPA
   2021-2022 Chair, NASBA

10:30 - 10:45 a.m.  BREAK  Coronado Foyer – 4th Floor | Harbor Tower

10:45 - 11:00 a.m.  Report from AICPA Chair  Coronado Ballroom – 4th Floor | Harbor Tower
   Anoop Mehta, CPA, CGMA
   2022-2023 Chair, AICPA
### MONDAY, OCTOBER 31, 2022 CONTINUED

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<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>11:00 a.m. - 12:00 p.m.</td>
<td><strong>CPA Evolution and the CPA Exam - the Latest Progress for 2024</strong></td>
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<td><strong>Colleen K. Conrad, CPA</strong> Executive Vice President and COO, NASBA</td>
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<td><strong>Lori A. Kelly, CPA</strong> Lead Manager – Exam Content, AICPA</td>
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<td>12:00 - 1:45 p.m.</td>
<td><strong>Luncheon with David Wasserman</strong> Harbor Ballroom ABC – 2nd Floor</td>
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<td><strong>Senior Election Analyst, The Cook Political Report with Amy Walter</strong></td>
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<td><strong>and NBC Contributor</strong></td>
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<td>2:00 - 2:30 p.m.</td>
<td><strong>UAA Update</strong> Coronado Ballroom – 4th Floor</td>
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<td><strong>Conditional Credit and Topics on the Horizon</strong></td>
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<td><strong>Stephanie M. Saunders, CPA</strong> Secretary, NASBA</td>
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<td>2:30 - 3:00 p.m.</td>
<td><strong>A Look Back: How Accountancy Became a Leader in Professional</strong></td>
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<td><strong>Licensure and Regulation</strong></td>
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<td><strong>Daniel J. Dustin, CPA</strong> Vice President, State Board Relations, NASBA</td>
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<td>3:00 - 3:30 p.m.</td>
<td><strong>Ethical Dilemmas Near and Far:</strong></td>
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<td><strong>Board Member Conflicts of Interest and Private Equity Ownership Update</strong></td>
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<td><strong>Frank Trainor, ESQ</strong> Staff Attorney, North Carolina State Board of CPA Examiners</td>
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<td><strong>Stephen M. Langowski, CPA</strong> Regional Director, NASBA</td>
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<td>3:30 - 3:45 p.m.</td>
<td><strong>Report from the NASBA Center for the Public Trust</strong></td>
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<td><strong>Alfonzo Alexander</strong> President, NASBA CPT</td>
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<td>3:45 - 5:00 p.m.</td>
<td><strong>CPT Event</strong> Coronado Foyer – 4th Floor</td>
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### TUESDAY, NOVEMBER 1, 2022

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<tr>
<td>8:00 - 9:50 a.m.</td>
<td><strong>Regional Breakfast Meetings</strong></td>
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<td><strong>Southeast Regional Breakfast</strong> Torrey Hills AB - 3rd Floor</td>
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<td><strong>Middle Atlantic Regional Breakfast</strong> Bankers Hill - 3rd Floor</td>
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<td><strong>Pacific Regional Breakfast</strong> Ocean Beach - 3rd Floor</td>
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<td><strong>Mountain Regional Breakfast</strong> Promenade A - 3rd Floor</td>
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<td><strong>Great Lakes Regional Breakfast</strong> Promenade B - 3rd Floor</td>
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<td><strong>Southwest Regional Breakfast</strong> Iron Mountain - 33rd Floor</td>
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<td><strong>Central Regional Breakfast</strong> Kingston Peak - 33rd Floor</td>
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<td><strong>Northeast Regional Breakfast</strong> Kingston Peak - 33rd Floor</td>
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<td>8:00 - 9:50 a.m.</td>
<td><strong>Breakfast for Other Attendees</strong> Marina Courtyard – 1st Floor</td>
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10:00 - 11:15 a.m.  
Annual Business Meeting  
Coronado Ballroom – 4th Floor | Harbor Tower

Minutes of 114th Annual Business Meeting
Stephanie M. Saunders, CPA, Secretary

NASBA Awards
Laurie J. Tish, CPA, Awards Committee Chair
Lorraine P. Sachs, NASBA Executive Vice President Emerita

Elections of NASBA Board Members
A. Carlos Barrera, CPA, Nominating Committee Chair

Bylaws Committee Report
Jimmy E. Burkes, CPA, Bylaws Committee Chair

Administration & Finance Committee Report
Tyrone Dickerson, CPA, Treasurer

Audit Committee Report
Michael Schmitz, CPA, Audit Committee Chair

Executive Directors Committee Report
Kent A. Absec, Executive Directors Committee Chair

11:15 a.m. - 12:00 p.m.  
The State of NASBA Report
Ken L. Bishop
President and CEO, NASBA

12:00 - 12:15 p.m.  
First Meeting of 2022-2023 NASBA Board of Directors

12:15 - 1:15 p.m.  
Luncheon  
Harbor Ballroom ABC – 2nd Floor | Harbor Tower

1:30 - 2:30 p.m.  
Inaugural Presentations
Thanks
W. Michael Fritz, CPA
2021-2022 Chair, NASBA

Inaugural Address
Richard N. Reisig, CPA
2022-2023 Chair, NASBA

2:30 - 3:15 p.m.  
An Update on Diversity Initiatives
Alfonzo Alexander
Chief Ethics & Diversity Officer, NASBA

3:15 - 4:00 p.m.  
Pipeline Initiatives in Action
Colleen K. Conrad, CPA
Executive Vice President and COO, NASBA

Marta Zaniewski
Vice President, State Regulatory & Legislative Affairs, AICPA

4:00 p.m.  
RECESS

6:00 p.m.  
CELEBRATION  
The Lane – Offsite

Trolleys will depart from the lobby beginning at 5:45 p.m.
WEDNESDAY, NOVEMBER 2, 2022

8:00 - 9:00 a.m.  State Board Presidents’ and Chairs’ Breakfast Meeting
Moderator: W. Michael Fritz, CPA
2021-2022 Chair, NASBA

8:00 - 9:00 a.m.  Executive Directors’ and State Board Staff Breakfast Meeting
Moderator: John E. Patterson, ESQ
2022-2023 Executive Directors Committee Chair, NASBA

8:00 - 9:00 a.m.  Breakfast (All Welcome)
Marina Courtyard – 1st Floor Outside

9:15 - 9:45 a.m.  The Latest Legal Cases
Elizabeth Wolfe, ESQ
Senior Regulatory Counsel, NASBA

9:45 - 10:15 a.m.  Advances in Audit Risk Mitigation
Carl R. Mayes, Jr., CPA
Associate Director – CPA Quality & Evolution, AICPA

10:15 - 10:45 a.m.  Legislative Trends Affecting Boards of Accountancy
John W. Johnson
Director, Legislative and Governmental Affairs, NASBA

10:45 - 11:00 a.m.  Report from the Examination Review Board
Ruben Davila, CPA, CFF, ESQ
Chair, CPA Examination Review Board

11:00 - 11:10 a.m.  Questions for NASBA Leadership
Richard N. Reisig, CPA, and Ken L. Bishop

11:10 - 11:20 a.m.  Closing Remarks on 2022 Annual Meeting - Invitation to 2023 Annual
Richard N. Reisig, CPA
2022-2023 Chair, NASBA

11:20 - 11:35 a.m.  Daily Recap

11:35 a.m.  ADJOURN