



# 41<sup>st</sup> Annual Conference for Executive Directors and Board Staff

JW Marriott Starr Pass Hotel  
3800 W. Starr Pass Boulevard  
Tucson, Arizona

February 27 – March 1, 2023 (Mountain Time)

## TENTATIVE AGENDA

### Monday, February 27, 2023

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**9:00 am – 12:00 pm** Executive Director Committee Meeting  
State Society Relations Committee Meeting

**1:00 – 2:00 pm** Registration Open

#### OPENING PLENARY SESSION

**2:00 – 2:15 pm** Welcome  
*(with Legal & State Society CEOs)*

Speakers: John Patterson, Executive Director  
Accountancy Board of Ohio

Jeannine Birmingham, CEO, CPA, CAE, CGMA  
Alabama Society of CPAs

**2:15 – 3:00 pm** NASBA Report from Leadership  
*(with Legal & State Society CEOs)*

Speakers: Rick Reisig, CPA, 2022-2023 Chair  
NASBA

Ken L. Bishop, President & CEO  
NASBA

**3:00 – 3:45 pm** Legislative Update  
*(with Legal & State Society CEOs)*

Speaker: John Johnson, Director Legislative & Governmental Affairs,  
NASBA

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**3:45 – 4:30 pm**

**Legal Cases and Federal Agency Discipline**

*(with Legal & State Society CEOs)*

Speakers: Elizabeth Wolfe, Esq, Regulatory Counsel  
NASBA

Shelby Nelson, Esq., Regulatory Counsel  
NASBA

**4:30 – 4:45 pm**

**Recap and Announcements** *(with Legal & State Society CEOs)*

**4:45 pm**

**Adjourn**

**6:00 pm**

**Welcome Reception** *(with Legal & State Society CEOs)*

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#### Tuesday, February 28, 2023

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**7:15 – 8:30 am**

**Complimentary Headshots**

**7:30 – 8:30 am**

**Breakfast**

**MORNING PLENARY SESSION**

**8:30 – 9:15 am**

**Principal Place of Business** *(with State Society CEOs)*

Speakers: TBD

**9:15 – 9:45 am**

**Continuing Professional Education** *(with State Society CEOs)*

Speakers: TBD



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**9:45 – 10:30 am**

**Education and Internships** *(with State Society CEOs)*

Speakers: Dan Dustin, Vice President State Board Relations  
NASBA

Dan Sweetwood, Executive Director  
Nebraska State Board of Public Accountancy

**10:30 – 11:00 am**

**Break**

**11:00 – 11:45 am**

**CPA Pipeline** *(with State Society CEOs)*

Speakers: William Treacy, Executive Director  
Texas State Board of Public Accountancy

Jodi Ann Ray, CAE, President, and CEO  
Texas Society of CPAs

**11:45 am – 12:30 pm** **CPA Examination Update** *(with State Society CEOs)*

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

Michael Decker, Vice President  
CPA Examination and Pipeline – Public Accounting  
AICPA

**12:30 – 2:00 pm**

**Lunch** *(with Legal & State Society CEOs)*



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### AFTERNOON PLENARY SESSION

- 2:00 – 2:30 pm**      **What is Peer Review? (with State Society CEOs)**
- Speakers:      Beth Thoresen, Director, Peer Review Operations  
AICPA
- Viki Windfeldt, Executive Director,  
Nevada State Board of Accountancy
- 2:30 – 3:15 pm**      **Board and Society Collaboration (with State Society CEOs)**
- Speakers:      John Patterson, Executive Director  
Accountancy Board of Ohio
- Jeannine Birmingham, CEO, CPA, CAE, CGMA  
Alabama Society of CPAs
- 3:15 – 3:45 pm**      **Break**
- 3:45 – 4:30 pm**      **Firm Ownership/Alternative Practice Structure (APS) (with State Society CEOs)**
- Speakers:      D. Boyd Busby, CPA, Executive Director  
Alabama State Board of Public Accountancy
- Jim Titus  
Nebraska Board of Accountancy
- 4:30 – 5:00 pm**      **Recap and Announcements (with State Society CEOs)**
- 5:00 pm**              **Adjourn**
- 6:00 – 8:00 pm**      **Starry Night Mix N’ Mingle**



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## TENTATIVE AGENDA

### Wednesday, March 1, 2023

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8:00 - 9:00 am

Breakfast

#### MORNING PLENARY SESSION

9:00 – 10:00 am

**Emerging Issues** (*with State Society CEOs*)

Speakers:

John Patterson, Executive Director  
Accountancy Board of Ohio

Andy Wright, CPA, Executive Director  
Mississippi State Board of Public Accountancy

Lisa Benefield, CPA, Executive Director  
State Board of CPAs of Louisiana

10:00 – 10:30 am

**Executive Director Breakout (Closed Session)**  
**Board Staff Breakout (Closed Session)**

10:30 – 11:00 am

Break

11:00am – 12:30 pm

**Executive Director Breakout (Closed Session)**  
**Board Staff Breakout (Closed Session)**

12:30 – 2:00 pm

Lunch



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### AFTERNOON PLENARY SESSION

**2:00 – 4:00 pm**                      **Executive Director Q&A Session with NASBA Leadership (Closed Session)**

Presiding:     John Patterson, Executive Director  
                         Accountancy Board of Ohio

**4:00 pm**                                **Adjourn**

**6:00 pm**                                **Denim & Diamonds Celebration**

**Thursday, March 2, 2023**

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**9:00 am – 12:00 pm**                **Executive Director Committee Meeting**