



41st 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

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

Ron Gitz, CPA, CEO
Society of Louisiana 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

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

Tuesday, February 28, 2023

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:

9:15 – 9:45 am

Continuing Professional Education *(with State Society CEOs)*

Speakers: Nancy Glynn, Executive Director



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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
- Dan Sweetwood, Executive Director
Nebraska Board of Accountancy
- 4:30 – 5:00 pm** **Recap and Announcements (with State Society CEOs)**



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5:00 pm Adjourn

6:00 – 8:00 pm Noche de Juegos

Wednesday, March 1, 2023

7:15 – 9:00 am Complimentary Headshots

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, 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)



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12:30 – 2:00 pm Lunch

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 & Gems Closing Celebration

Thursday, March 2, 2023

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