

NASBA

41ST ANNUAL CONFERENCE FOR
EXECUTIVE DIRECTORS & STATE BOARD STAFF
TUCSON, AZ | FEBRUARY 27 – MARCH 1, 2023



MISSION DRIVEN - MEMBER FOCUSED

Agenda

MONDAY, FEBRUARY 27, 2023

9:00 am – 12:00 pm	Executive Directors Committee Meeting	San Pedro I
9:00 am – 12:00 pm	State Society Relations Committee Meeting	San Pedro II
1:00 – 2:00 pm	Registration Open	Arizona Foyer
OPENING PLENARY SESSION		
2:00 – 2:15 pm	Welcome (with Legal & State Society CEOs) Speakers: John Patterson, Esq. Executive Director, Accountancy Board of Ohio Ron Gitz, CPA CEO, Society of Louisiana CPAs	Arizona Ballroom 6&7
2:15 – 3:00 pm	NASBA Report from Leadership (with Legal & State Society CEOs) Speakers: Richard N. Reisig, CPA 2022-2023 Chair, NASBA Ken L. Bishop President & CEO, NASBA	
3:00 – 3:30 pm	Legislative Update (with Legal & State Society CEOs) Speaker: John Johnson Director, Legislative & Governmental Affairs, NASBA	
3:30 – 4:00 pm	Legal Cases and Federal Agency Discipline (with Legal & State Society CEOs) Speakers: Elizabeth Wolfe, Esq. Senior Regulatory Counsel, NASBA Shelby Nelson, Esq. Regulatory Counsel, NASBA	
4:00 – 4:45 pm	Securities & Exchange Commission: Enforcement (with Legal & State Society CEOs) Speaker: Ryan Wolfe, CPA, CFA Chief Accountant, SEC	

MONDAY, FEBRUARY 27, 2023 continued

4:45 – 5:00 pm **Recap and Announcements**
(with Legal & State Society CEOs)

5:00 pm **Adjourn**

6:00 pm **Starry Night Welcome Reception** **Tucson E**
(with Legal & State Society CEOs)

TUESDAY, FEBRUARY 28, 2023

7:15 – 8:30 am **Complimentary Headshots** **Arizona Foyer**

7:30 – 8:30 am **Breakfast** **Passaggio**

MORNING PLENARY SESSION

8:30 – 9:15 am **Addressing Pipeline Challenges**
(with State Society CEOs)
Speakers: **Colleen K. Conrad, CPA**
Executive Vice President & COO, NASBA
Michael A. Decker
Vice President, CPA Examination and Pipeline – Public Accounting, AICPA

9:15 – 9:45 am **Continuing Professional Education**
(with State Society CEOs)
Speaker: **Nancy Glynn**
Executive Director, Virginia Board of Accountancy

9:45 – 10:30 am **Education and Internships**
(with State Society CEOs)
Speakers: **Dan Dustin, CPA**
Vice President, State Board Relations, NASBA
Dan Sweetwood
Executive Director, Nebraska State Board of Public Accountancy

10:30 – 11:00 am **Break** **Arizona Foyer**

11:00 – 11:45 am **CPA Pipeline – An Educator’s Prospective**
(with State Society CEOs)
Speaker: **Steve Grice, Phd, CPA**
Scholar-in-Residence, School of Accountancy, Troy University

11:45 am – 12:30 pm **CPA Examination Update**
(with State Society CEOs)
Speakers: **Colleen K. Conrad, CPA**
Executive Vice President & COO, NASBA
Michael A. Decker
Vice President, CPA Examination and Pipeline – Public Accounting, AICPA
Kimberly Farace
Director, Client Success, Prometric

TUESDAY, FEBRUARY 28, 2023 continued

12:30 – 2:00 pm **Lunch** **Ania Terrace**
(with Legal & State Society CEOs)

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, Esq.**
Executive Director, Accountancy Board of Ohio
Ron Gitz, CPA, CGMA
CEO, Society of Louisiana CPAs

3:15 – 3:45 pm **Break** **Arizona Foyer**

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, Esq.
Board Legal Counsel, Nebraska Board of Public Accountancy

4:30 – 5:00 pm **Recap and Announcements**
(with State Society CEOs)

5:00 pm **Adjourn**

6:00 – 8:00 pm **Noche de Juegos (Game Night)** **Tash Lawn**

WEDNESDAY, MARCH 1, 2023

7:15 – 9:00 am **Complimentary Headshots** **Arizona Foyer**

8:00 – 9:00 am **Breakfast** **Passaggio**

WEDNESDAY, MARCH 1, 2023 continued

MORNING PLENARY SESSION

9:00 – 10:00 am	Emerging Issues (with State Society CEOs) Speakers: John Patterson, Esq. Executive Director, Accountancy Board of Ohio Andy Wright, CPA Executive Director, Mississippi State Board of Public Accountancy Lisa Benefield, Esq. Executive Director, State Board of CPAs of Louisiana	Arizona Ballroom 6&7
10:00 – 10:30 am	Executive Director Breakout (Closed Session) Board Staff Breakout (Closed Session)	Arizona Ballroom 6&7 San Pedro
10:30 – 11:00 am	Break	Arizona Foyer
11:00 am – 12:30 pm	Executive Director Breakout (Closed Session) Board Staff Breakout (Closed Session)	Arizona Ballroom 6&7 San Pedro
12:30 – 2:00 pm	Lunch	Arizona Foyer

AFTERNOON PLENARY SESSION

2:00 – 4:00 pm	Executive Director Q&A Session with NASBA Leadership (Closed Session) Presiding: John Patterson, Esq. Executive Director, Accountancy Board of Ohio	
4:00 pm	Adjourn	
6:30 pm	Denim & Gems Celebration	Arizona 6&7

THURSDAY, MARCH 2, 2023

9:00 am – 12:00 pm	Executive Directors Committee Meeting	Boardroom 1
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