

NASBA Annual Meeting Innovate, Collaborate, Succeed Tentative Agenda

Sunday, October 27, 2024

8:00 a.m. – 2:00 p.m.	Golf Outing	
3:00 – 5:00 p.m.	Registration	Bonnet Creek Foyer
3:30 – 5:30 p.m.	CPT Ethics Workshop Ethics: Every Choice has a Consequence Chuck Gallagher, CSP Business Ethics Expert	Bonnet Creek VII-IX
6:00 – 8:00 p.m.	Welcome Reception	Waterside Patio & Green

Monday, October 28, 2024

7:30 – 8:30 a.m.	Communications Breakfast	La Luce
8:00 – 9:00 a.m.	Breakfast (All Welcome)	Bonnet Creek VII-IX
9:00 – 11:00 a.m.	Opening Plenary Session	Bonnet Creek I-VI
9:00 – 9:20 a.m.	Call to Order and Introductions Stephanie M. Saunders, CPA 2023-2024 Chair, NASBA	
9:20 – 9:30 a.m.	Welcome to Orlando Brent Sparkman, CPA Chair, Florida Board of Public Accountancy	
9:30 – 10:30 a.m.	Private Equity Investment in Public Accounting Firms Matthew Boshier, Esq. Hunton Andrews Kurth LLP	
10:30 – 10:45 a.m.	A Year in Review: Report from NASBA Chair Stephanie M. Saunders, CPA 2023-2024 Chair, NASBA	
10:45 – 11:00 a.m.	The Latest Developments from the AICPA: A Report from the AICPA Chair Carla McCall, CPA 2024-2025 Chair, AICPA	

Monday, October 28, 2024 continued

11:00 – 11:15 a.m.	BREAK	
11:15 a.m. – 12:30 p.m.	The Hero Effect® - Being Your Best When It Matters the Most Kevin Brown, Keynote Address	Bonnet Creek VII-IX
12:30 – 1:30 p.m.	Luncheon	Bonnet Creek VII-IX
1:45 – 4:30 p.m.	Afternoon Plenary Session	Bonnet Creek I-VI
1:45 – 2:45 p.m.	UAA Update Nicola Neilon, CPA Chair, NASBA Uniform Accountancy Act Committee	
2:45 – 3:00 p.m.	BREAK	
3:00 – 4:00 p.m.	The Future of the Accounting Profession Barry C. Melancon CPA, CGMA President & CEO, AICPA	Bonnet Creek I-VI
4:00 – 4:30 p.m.	Growth in Ethics: A Report from the NASBA Center for the Public Trust Sedrik Newbern President, NASBA Center for the Public Trust Chief Ethics Officer, NASBA	
4:30 – 5:30 p.m.	CPT Fundraiser Event	Signature Island

Tuesday, October 29, 2024

7:30– 8:00 a.m.	Regional Breakfasts	
8:00 – 9:30 a.m.	Regional Breakout Meetings	
8:00 – 9:30 a.m.	Breakfast for Other Attendees	Bonnet Creek VII-IX

9:40 am – 12:00 p.m. **Morning Plenary Session** Bonnet Creek I-VI

9:40 – 11:15 a.m. **Annual Business Meeting**
Minutes of the 116th Annual Meeting
Nicola Neilon, CPA
Secretary

NASBA Awards
W. Michael Fritz, CPA
Chair, NASBA Awards Committee

Election of NASBA Board Members
Richard N. Reisig, CPA
Chair, NASBA Nominating Committee

Administration & Finance Committee Report
J. Andy Bonner, Jr., CPA, CGMA
Treasurer

Audit Committee Report
Laurie A. Warwick, CPA
Chair, NASBA Audit Committee

11:15 a.m. – 12:00 p.m. **The State of NASBA**
Daniel J. Dustin, CPA
President and CEO, NASBA

12:00 – 12:15 p.m. **First Meeting of 2024-25 NASBA Board of Directors** Julliard Complex – 5th Floor

12:15 – 1:30 p.m. **Luncheon** Bonnet Creek VII-IX

1:30 – 4:00 p.m. **Afternoon Plenary Session** Bonnet Creek I-VI

1:30 – 2:30 p.m. **Inaugural Presentations**
Acknowledgements & Gratitude
Stephanie M. Saunders, CPA
2023-2024 Chair, NASBA

Inaugural Address
Maria E. Caldwell, CPA
2024-2025 Chair, NASBA

2:30 – 3:00 p.m. **Audit Talent and Artificial Intelligence**
Christina Ho, CPA
Member, PCAOB

Tuesday, October 29, 2024 continued

3:00 – 3:15 p.m.	BREAK	Bonnet Creek Foyer
3:15 – 3:45 p.m.	The CPA Exam: A Report on Progress Colleen K. Conrad, CPA Executive Vice President and COO, NASBA Michael A. Decker Vice President – CPA Examination and Pipeline – Public Accounting, AICPA	Bonnet Creek I-VI
3:45 – 4:15 p.m.	Experience Learn and Earn (ELE) Kent A. Absec Vice President, State Board Relations, NASBA Lindsey Yopp Lead Manager - CPA Pipeline, AICPA	
4:15 p.m.	RECESS	
6:30 p.m.	NASBA Luau Extravaganza	Sea World’s Discovery Cove

Wednesday, October 30, 2024

8:00 – 9:15 a.m.	State Board President & Chair Breakfast Meeting Moderator: Maria E. Caldwell, CPA 2024-2025 Chair, NASBA	La Luce
8:00 – 9:15 a.m.	Executive Director & State Board Staff Breakfast Meeting Moderator: Nancy Glynn, CPA Executive Director, Virginia Board of Accountancy 2024-2025 Chair, NASBA Executive Directors Committee	Zeta Bar
8:00 – 9:15 a.m.	Breakfast (All Welcome)	Bonnet Creek VII-IX
9:15 – 11:50 a.m.	Morning Plenary Session	Bonnet Creek VII-IX
9:15 – 10:15 a.m.	AI Revolution: Unlocking the Future of Tomorrow Chuck Gallagher, CSP Business Ethics Expert, AI Keynote	
10:15 – 10:45 a.m.	Education Grant Research Findings Charles R. Thomas, Jr., PhD, CMA, CGMA (inactive), CPA Professor, Tarleton State University	
10:45 – 11:15 a.m.	Legislative Trends Affecting Boards of Accountancy: What You Need to Know John W. Johnson Vice President, Legislative and Governmental Affairs, NASBA	

Wednesday, October 30, 2024 continued

- 11:15 – 11:30 a.m.** **Relying on the CPA Exam: A Report from the CPA Examination Review Board**
Faye D. Miller, CPA
Chair, CPA Examination Review Board
- 11:30 – 11:45 a.m.** **Questions for NASBA Leadership**
Maria E. Caldwell, CPA
2024-2025 Chair, NASBA
Daniel J. Dustin, CPA
President and CEO, NASBA
- 11:45 – 11:50 a.m.** **Closing Remarks on the 2024 Annual Meeting Invitation to 2025 Annual**
Maria E. Caldwell, CPA
2024-2025 Chair, NASBA
- 11:50 a.m. – 12:00 p.m.** **Final Recap**
- 12:00 p.m.** **ADJOURN**