

# NASBA

## 116TH ANNUAL MEETING

NEW YORK, NY | OCTOBER 29 - NOVEMBER 1



MISSION DRIVEN - MEMBER FOCUSED

## “NEW BEGINNINGS”

### AGENDA

(Updated 09/14/2023)

#### Sunday, October 29, 2023

3:00 - 5:00 pm	Registration	Broadway Pre-function – 6 <sup>th</sup> Floor
4:00 - 5:30 pm	CPT Ethics Workshop	Manhattan Ballroom – 9 <sup>th</sup> Floor
6:00 - 8:00 pm	Welcome Reception	Westside Ballroom – 5 <sup>th</sup> Floor

#### Monday, October 30, 2023

8:00 - 9:00 am	Breakfast (All Welcome)	Westside Ballroom – 5 <sup>th</sup> Floor
9:00 - 10:30 am	Call to Order and Introductions Richard N. Reisig, CPA 2022-2023 Chair, NASBA	Broadway Ballroom – 6 <sup>th</sup> Floor
9:20 - 9:30 a.m.	Welcome to New York Ann Cohen, CPA Chair, New York State Board for Public Accountancy	Broadway Ballroom – 6 <sup>th</sup> Floor
9:30 - 10:15 a.m.	The Future of the Profession Barry Melancon, CPA President & CEO, Association of International Certified Professional Accountants	Broadway Ballroom – 6 <sup>th</sup> Floor
10:15 - 10:30 a.m.	A Year in Review: Report from NASBA Chair Richard N. Reisig, CPA 2022-2023 Chair, NASBA	Broadway Ballroom – 6 <sup>th</sup> Floor
10:30 - 10:45 a.m.	BREAK	Broadway Pre-function – 6 <sup>th</sup> Floor

## Monday, October 30, 2023, continued

10:45 - 11:00 a.m.	<b>The Latest Developments from the AICPA: A Report from the AICPA Chair</b> <a href="#">Okorie Ramsey, CPA, CGMA</a>	<b>Broadway Ballroom – 6<sup>th</sup> Floor</b>
11:00 a.m. - 12:00 p.m.	<b>CPA Evolution &amp; the CPA Exam: Implementation on the Horizon</b> <a href="#">Colleen K. Conrad, CPA</a> Executive Vice President and COO, NASBA <a href="#">Michael A. Decker</a> Vice President – CPA Examination and Pipeline – Public Accounting, AICPA	<b>Broadway Ballroom – 6<sup>th</sup> Floor</b>
12:00 - 1:30 p.m.	<b>Business Luncheon Keynote Presentation</b> <a href="#">Paul Zikopoulos</a> Future Trends Expert VP of Technology Group Skills Vitality & Enablement at IBM	<b>Westside Ballroom – 5<sup>th</sup> Floor</b>
1:30 – 2:30 p.m.	<b>A Case Study in the Ethical Use of AI Today</b> <a href="#">Danielle Supkis Cheek, CPA</a> Vice President of Strategy and Industry Relations, MindBridge	
2:30 – 3:00 p.m.	<b>The UAA – Peer Review Submissions to Boards of Accountancy</b> <a href="#">Nicola Neilon, CPA</a> Director-at-Large, NASBA	<b>Broadway Ballroom – 6<sup>th</sup> Floor</b>
3:00 - 3:30 p.m.	<b>Furthering Pathways Discussions</b> <a href="#">Daniel J. Dustin, CPA</a> Vice President, State Board Relations	<b>Broadway Ballroom – 6<sup>th</sup> Floor</b>
3:30 – 3:45 p.m.	<b>Relying on the CPA Exam: A Report from the Examination Review Board</b> <a href="#">Ruben Davila, CPA, CFF, ESQ</a> Past Chair, CPA Examination Review Board	<b>Broadway Ballroom – 6<sup>th</sup> Floor</b>
3:45 – 4:00 p.m.	<b>Growth in Ethics and Diversity: A Report from the NASBA Center for the Public Trust</b> <a href="#">Alfonzo Alexander, CPC</a> President, NASBA CPT	<b>Broadway Ballroom – 6<sup>th</sup> Floor</b>
4:00 - 5:00 p.m.	<b>CPT “Cuffed for a Cause” Fundraiser Event</b>	<b>Terrace – 9<sup>th</sup> Floor</b>

## Tuesday, October 31, 2023

8:00 - 9:50 a.m.	<b>Regional Breakfast Meetings</b> Southeast Regional Breakout Breakfast Middle Atlantic Regional Breakout Breakfast Pacific Regional Breakout Breakfast Mountain Regional Breakout Breakfast Great Lakes Regional Breakout Breakfast Southwest Regional Breakout Breakfast Central Regional Breakout Breakfast Northeast Regional Breakout Breakfast	Edison – 5 <sup>th</sup> Floor Barrymore – 4 <sup>th</sup> Floor Julliard – 5 <sup>th</sup> Floor Oneill – 4 <sup>th</sup> Floor Broadhurst – 5 <sup>th</sup> Floor Ziegfeld – 4 <sup>th</sup> Floor Belasco – 5 <sup>th</sup> Floor Odets- 5 <sup>th</sup> Floor
8:00 - 9:50a.m.	<b>Breakfast for Other Attendees</b>	Carnegie – 5 <sup>th</sup> Floor
10:00 - 11:15 a.m.	<b>Annual Business Meeting</b> Minutes of the 115 <sup>th</sup> Annual Meeting Nicola Neilon, CPA, Secretary  NASBA Awards A. Carlos Barrera, CPA, Awards Committee Chair  Election of NASBA Board Members W. Michael Fritz, CPA, Nominating Committee Chair	Broadway Ballroom – 6 <sup>th</sup> Floor
11:15 a.m. - 12:00 p.m.	<b>The State of NASBA</b> Ken L. Bishop President and CEO, NASBA	Broadway Ballroom – 6 <sup>th</sup> Floor
12:00 - 12:15 p.m.	<b>First Meeting of 2023-24 NASBA Board of Directors</b>	Julliard Complex – 5 <sup>th</sup> Floor
12:15 - 1:30 p.m.	<b>Attendee Luncheon</b>	Broadway Ballroom – 6 <sup>th</sup> Floor
1:30 - 2:30 p.m.	<b>Inaugural Presentations</b> Acknowledgements & Gratitude Richard N. Reisig, CPA, 2022-23 Chair  Inaugural Address Stephanie M. Saunders, CPA, 2023-24 Chair	Broadway Ballroom – 6 <sup>th</sup> Floor
2:30 – 3:00 p.m.	<b>Diversifying the Accounting Talent Pipeline</b> Liz Barentzen, ESQ VP, Operations and Talent Initiatives, Center for Audit Quality	Broadway Ballroom – 6 <sup>th</sup> Floor
3:00 - 3:30 p.m.	<b>Addressing the CPA Talent Shortage</b> Susan Coffey, CEO Public Accounting AICPA	Broadway Ballroom – 6 <sup>th</sup> Floor
3:30 - 4:00 p.m.	<b>Legislative Trends Affecting Boards of Accountancy: What You Need to Know</b> John W. Johnson Director, Legislative and Governmental Affairs, NASBA	Broadway Ballroom – 6 <sup>th</sup> Floor

## Tuesday, October 31, 2023, continued

4:00 p.m.	RECESS	Broadway Ballroom – 6 <sup>th</sup> Floor
6:30 p.m.	CELEBRATION	Broadway Ballroom – 6 <sup>th</sup> Floor

## Wednesday, November 1, 2023

8:00 - 9:15 a.m.	<b>State Board President &amp; Chair Breakfast Meeting</b> Moderator: <b>Stephanie M. Saunders, CPA</b> 2023-2024 Chair, NASBA	Ziegfeld – 4 <sup>th</sup> Floor
8:00 - 9:15 a.m.	<b>Executive Director &amp; State Board Staff Breakfast Meeting</b> Moderator: <b>D. Boyd Busby, CPA, CGMA</b> 2023-2024 Executive Directors Committee Chair, NASBA	Odets – 4 <sup>th</sup> Floor
8:00 - 9:15 a.m.	<b>Breakfast (All Welcome)</b>	Majestic Complex – 6 <sup>th</sup> Floor
9:15 - 9:45 a.m.	<b>The Latest Developments from the SEC</b> <b>Ryan Wolfe, CPA</b> Chief Accountant – Division of Enforcement, US Securities & Exchange Commission	Broadway Ballroom – 6 <sup>th</sup> Floor
9:45 - 10:15 a.m.	<b>NASBA Education Research Grant Recipients: A Report on Their Findings</b> <b>Ryan Cahalan, JD, LL.M.</b> Central Washington University  <b>Tristan B. Johnson, CPA</b> University of South Alabama	Broadway Ballroom – 6 <sup>th</sup> Floor
10:15 – 11:00 a.m.	<b>The Latest on NASBA Diversity Initiatives</b> <b>Alfonzo Alexander, CPC</b> Chief Ethics & Diversity Officer, NASBA	Broadway Ballroom – 6 <sup>th</sup> Floor
11:00 - 11:10 a.m.	<b>Questions for NASBA Leadership</b> <b>Stephanie M. Saunders, CPA, and Ken L. Bishop</b>	Broadway Ballroom – 6 <sup>th</sup> Floor
11:10 - 11:20 a.m.	<b>Closing Remarks on the 2023 Annual Meeting</b> <b>Stephanie M. Saunders, CPA</b> 2023-2024 Chair, NASBA	Broadway Ballroom – 6 <sup>th</sup> Floor
11:20 - 11:35 a.m.	<b>Final Recap</b>	Broadway Ballroom – 6 <sup>th</sup> Floor
11:35 a.m.	<b>ADJOURN</b>	Broadway Ballroom – 6 <sup>th</sup> Floor