

University of Southern California
39th Annual SEC and Financial Reporting Institute
Conference, June 3/4, 2021

Virtual Event

Final Draft, Version 8

Agenda

Thursday, June 3, 2021

8:00am to 8:25am **SEC and Financial Reporting Conference Welcome**

Tony Aaron, Director, USC SEC and Financial Reporting Institute

William Holder, Dean, USC Leventhal School

Geoff Garrett, Dean, USC Marshall School

8:30am to 9:20am **Opening Keynote Session with the SEC and the FASB**

Moderator: Christine Davine, National Managing Partner, Audit & Assurance: Quality, Risk & Regulatory, Deloitte & Touche LLP

Panelists:

Paul Munter, Acting Chief Accountant, Office of the Chief Accountant, SEC

Rich Jones, Chair, FASB

9:30am to 10:45am **Panel 1: Current Financial Reporting Practice Issues**

Moderator: John White, Partner, Cravath, Swaine & Moore LLP

Panelists:

Lindsay McCord, Chief Accountant, Division of Corporation Finance, SEC

Christine Davine, National Managing Partner, Audit & Assurance: Quality, Risk & Regulatory, Deloitte & Touche LLP

Josh Paul, Controller and Director of Accounting, Alphabet, Inc.

11:00am to 12:15pm **Panel 2: Current Auditing Practice Issues**

Moderator: Christian Peo, National Managing Partner, Audit Quality and Professional Practice, KPMG LLP

Panelists:

Diana Stoltzfus, Deputy Chief Accountant, Professional Practice Group, Office of the Chief Accountant, SEC

George Botic, Director, Registration and Inspections, PCAOB

Laura Phillips, Vice President, Chief Accounting Officer, Covetrus

Muneera Carr, Chief Accounting Officer and Controller for Wells Fargo

12:15pm to 12:20pm **First Day Announcements and Adjournment: Tony Aaron**

Friday, June 4, 2021

8:00am to 8:10am **Second Day Welcome and Introduction of Keynote speaker: Tony Aaron, Christine Davine**

8:10am to 8:50am **Keynote Opening Session**

Cathy Engelbert, former Deloitte CEO and current commissioner of the WNBA
“Leadership and the Future of Work”

9:00am to 10:15am **Panel 3: Current ESG Practice Issues**

Rudi Bless, Chief Accounting Officer, Bank of America

Panelists:

Marc Siegel, Current SASB Board Member, former FASB Board Member, EY Financial Accounting Advisory Services Partner

Leslie Seidman, Former FASB Chair, Former Public Governor of the Financial Industry Regulatory Authority (FINRA), Independent Director and Audit Committee Chair: GE and Moody’s

Michelle Edkins, Managing Director and Global Head of Blackrock Investment Stewardship

Kristina Wyatt, Senior Counsel for Climate and ESG to the U.S. Securities and Exchange Commission's Director of the Division of Corporation Finance

10:30am to 11:45am **Panel 4: Current Accounting Practice Issues**

Moderator: Alison Spivey, National Office Partner, EY LLP

Panelists:

John Vanosdall, Deputy Chief Accountant, Office of the Chief Accountant, SEC

Hillary H. Salo, FASB Staff Technical Director, Chair, Emerging Issues Task Force

Angela Newell, Chair of FinREC, National Office Partner, BDO

Heather Dixon, Chief Accounting Officer, Walgreens Boots Alliance

12:00pm to 1:15pm **Panel 5: Current Board of Directors and Audit Committee Practice Issues**

Moderator: Paula Loop, Governance Insights Center Leader, PWC LLP

Panelists:

Robert Herz, Former FASB Chair, Independent Director: Morgan Stanley, Workiva Inc., Paxos Trust Company LLC/Kabompo Holdings, Ltd., Fannie Mae

Anthony K. Anderson: Independent Director: Exelon Corporation, AAR Corp., Marsh and McLennan Companies, Avery Dennison Corporation

Michael Morrow: FASAC chair, Independent Director and Audit Committee Chair for Cabot Corporation

Olivia Kirtley: Lead Director, US Bancorp, Independent Director and member of the audit committee, Papa Johns International, Inc., Independent Director, Bexion Pharmaceuticals, Former President, International Federation of Accountants (IFAC), Former Chair of the American Institute of Certified Public Accountants (AICPA), Former Chair of the AICPA Board of Examiners

1:15pm to 1:20pm **Final Announcements and Adjournment: Tony Aaron**