

# TXCPA's Annual Meeting of Members



**T**XCPA members and their guests traveled to the historic downtown Worthington Renaissance Fort Worth Hotel for the 2023 Annual Meeting of Members on June 23-24. It was an opportunity for members to connect and network with each other and with TXCPA leaders from across the state, while also learning about key issues in the profession and having some fun. The program included a social event for members and guests at the Fort Worth Stockyards.

## Year in Review and a Look Ahead

Chair Tim Pike, CPA-Dallas, CFE, Immediate Past Chair Sheila Enriquez, JD, CPA-Houston, CFF, CVA, and TXCPA President and CEO Jodi Ann Ray, CAE, started the meeting with a review of the work completed in 2022-2023 and goals for 2023-2024.

### Legislative Successes

TXCPA and the profession celebrated successes from the 88th Texas

understanding and clear path as to what is needed to begin taking the CPA Exam after 120 semester hours.

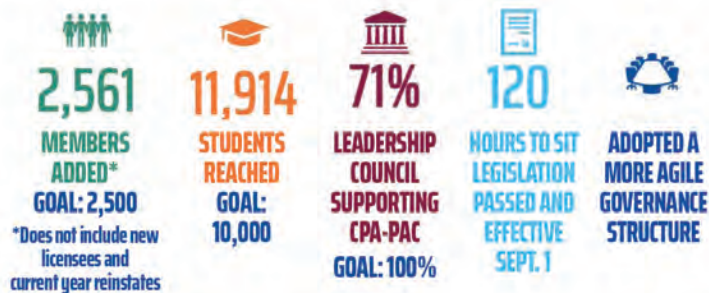
The Governor also signed HB 2217, which will expand the scope and reach of TSBPA's accounting scholarship program. These accounting scholarships will now be available to eligible accounting students who have obtained at least 15 hours of upper-level accounting. Prior to HB 2217, the TSBPA accounting scholarship program was limited to accounting students in their 5th year of education.

and chapters for their support of this important work.

We hosted CPA Weeks in the fall and the spring, which helped us focus our outreach as a community and reach even more students.

This coming November, TXCPA is hosting BOTH Month of Service and Accounting Opportunities Month. Members, chapters and organizations are encouraged to give back through community service and outreach to schools and students to share

### 2022-2023 SUCCESSES



### ADVOCACY FOR THE PROFESSION – FEDERAL TAX POLICY COMMITTEE AND PROFESSIONAL STANDARDS COMMITTEE

In the 2022-2023 year, TXCPA's Federal Tax Policy Committee and Professional Standards Committee submitted comment letters and responded to exposure drafts on a number of important issues impacting the accounting profession.

Legislative Session. SB 159, which went into effect on September 1, allows students who have completed 120 semester hours and 21 hours of upper-level accounting to begin to take the CPA Exam. SB 159 places Texas in line with 48 other states. TXCPA was instrumental in helping to pass this legislation that will give students the opportunity to begin testing earlier and help them on the road to CPA licensure.

TXCPA's members worked closely with the bill's authors, Senator Charles Perry, CPA, and Rep. Angie Chen Button, CPA, and the Texas Legislature to pass the legislation and get it to the Governor for his signature. We are also working with the Texas State Board of Public Accountancy to draft and implement the rules so that students and educators will have a good

Both of these bills were priority bills for TXCPA this session and had wide support in the House and Senate, and both were important to our CPA pipeline strategy work.

### CPA Pipeline Strategy

After just one year of work on our statewide CPA pipeline strategy, we have already affected much change. The pipeline strategy was launched in June 2022. It is aimed at attracting more Texas students to the profession, providing support to CPA candidates, and strengthening relationships with educators at all grade levels.

In the 2022-2023 year, we had a goal to reach 10,000 students statewide – we reached almost 12,000 Texas students! Our thanks to the volunteers

resources about careers in accounting. Watch your TXCPA communications for details on how you can volunteer.

We also added more faculty and student ambassadors to better connect with more campuses in Texas. We have opportunities to grow these programs even more and welcome your recommendations for any professors or students you know who would be excellent connections.

For this year, an organizational goal has been set to reach at least 12,000 students. There are opportunities for every member to impact the CPA pipeline work being done at TXCPA and in your chapter. You can:

- Visit a school or classroom;
- Tell your story with a video testimonial;

- Support future CPAs in your firm or company as they prepare for the CPA Exam;
- Help promote the classroom resources, scholarships and connections available from TXCPA.

## CPA-PAC

CPA-PAC Chair Terri Hornberger, CPA-Dallas, shared important PAC updates. She said the CPA-PAC's work in 2022 during the election season helped lay the groundwork for TXCPA's very successful legislative session in

## 2023-2024 TXCPA LEADERSHIP

**BOARD OF DIRECTORS**  
[Go to the TXCPA website](#)

**LEADERSHIP COUNCIL**  
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Bill Voegeli from Association Insights discussed member data and feedback from TXCPA's continuous research. Eric Curtis from Curtis Strategy discussed trends in the association industry. Allan Koltin, CPA, CGMA,

## Business Matters

In other important updates and reports:

- TXCPA Treasurer Angela Ragan, CPA-Central Texas; Investments Committee Chair Chris Lucas, CPA-Fort Worth, CFA, ABV; and TXCPA CFO Edie Cogdell, CPA-Dallas, CGMA, gave the Annual Financial Report;
- Accounting Education Foundation Chair Gary McIntosh, CPA-Austin, provided an AEF update;

## 2022-2023 AWARDS

Please see the Take Note section of this *Today's CPA* issue for the Outstanding Chapter Awards and the Take Note section of the July/August *Today's CPA* issue for the names of award recipients recognized at the Annual Meeting.

## 2022-23 CPA-PAC CHAPTER AWARDS

**Large Chapter Award  
Closest to 2022-23  
Fundraising Goal**

**TXCPA DALLAS**

**President: Kenny Broom  
PAC Chair: Terri Hornberger**

**Highest Percentage  
of Members  
Contributing**

**TXCPA CORPUS CHRISTI  
WITH 6.6%**

**President: Brittin Stange  
PAC Chair: Susie Sullivan**

**Highest Percentage of  
Fundraising Goal**

**TXCPA PERMIAN BASIN  
WITH 120%**

**President: Catherine Speer  
PAC Chair: Jimmy Hudson**

2023, leading to the very substantial wins for the accounting profession.

## Leadership Council Provides Guidance for the Future

This was the first meeting of the Leadership Council following the governance model changes approved in January 2023. Input from TXCPA leadership ensures that the Society continues to provide the value and benefits our members need. To that end, the Leadership Council was engaged at the Annual Meeting to provide input for TXCPA's strategic planning process.

Before participating in roundtable discussions, the Leadership Council heard three keynote presentations.

from Koltin Consulting Group, Inc. gave an update on trends in the accounting profession.

Strategic Planning Committee Chair Lei Testa, CPA-Fort Worth, asked the Leadership Council to use what they learned from these keynote presentations to provide their thoughts about the future of TXCPA to the Strategic Planning Committee.

Small group discussions provided the following feedback:

- What they want to see for TXCPA in five to 10 years;
- Top three major issues impacting members, the profession and the Society;
- Major strategic moves TXCPA needs to take over the next five years to be relevant and fulfill the vision.

- TXCPA Secretary Josh LeBlanc, CPA-Southeast Texas, covered the quorum call and approval of the minutes from TXCPA's Midyear Board of Directors (now Leadership Council) and Members Meeting held on January 25, 2023.

## Mark Your Calendar Now

TXCPA's Midyear Leadership Council Meeting is planned for January 25-26, 2024, at the Omni Corpus Christi. [Reserve your room now!](#) Watch the weekly Viewpoint e-newsletter for meeting registration information.

Omni Frisco Hotel in Frisco will be the site for the 2024-2025 Annual Meeting of Members, June 28-29, 2024. We look forward to seeing you there!