

Iowa CPA

April 2026

Newsletter from the Iowa Society of CPAs, your primary source for profession-related information

Don't miss the ISCPA Leadership Summit 2026

After an exceptional inaugural launch last year, we are excited to invite you to the second annual ISCPA Leadership Summit 2026, a dynamic event designed to energize members through meaningful networking and practical leadership development. This year's summit brings together ISCPA members for a day focused on connection, growth and the evolving role of leadership within the CPA profession.



Carrie Steffen

A highlight of the summit is the keynote address by ISCPA CEO Carrie Steffen, who will present **"The Human Side of Leading Change: What it Means to Lead Yourself and Others When Everything Is Evolving."**

In a time of rapid transformation, leadership extends beyond strategy and expertise, it's about people. Carrie will explore how CPAs are uniquely positioned to not only respond to change, but to help guide others through it. Attendees will gain fresh perspectives on

leadership and leave with actionable steps they can apply regardless of title, role or experience.



Jenny McGarry

Following the keynote, a leadership workshop will invite participants to translate inspiration into action. **"Courage in Motion: Experiencing the Human Side of Leadership,"**

facilitated by Jenny McGarry, DBA, CPA, assistant professor of accounting at the University of Dubuque and ISCPA Board Director. The workshop will provide practical tools and insights to help members support themselves and others as the profession continues to evolve.

This interactive session is designed to build confidence, encourage collaboration and equip participants with strategies they can immediately apply in both their professional and volunteer roles.

The program includes networking opportunities with fellow CPAs and industry leaders, lunch, a special awards presentation recognizing the Outstanding Committee Chair and Distinguished Service honorees, and the short annual business meeting, including the election of the ISCPA Board of Directors. The day offers an opportunity to celebrate volunteers, recognize leaders and inspire members to engage more deeply with ISCPA.

The ISCPA Leadership Summit 2026 underscores ISCPA's commitment to developing leaders and strengthening connections across the profession, providing a platform for growth, engagement and shared success.

All ISCPA members are encouraged to attend! This event highlights ISCPA committee and resource group volunteers. Whether you are a new member or a seasoned volunteer, the Leadership Summit is your gateway to professional growth and enhanced engagement with ISCPA.

Don't miss this opportunity to be part of an inspiring experience that will expand your leadership perspective and strengthen your professional network. For more information and registration, visit www.iacpa.org/26ls.

Thank you to Gold Sponsor: The Reserves Network



May 1 is ISCPA membership renewal

Don't leave membership value on the table

While looking toward the new membership year that starts on May 1, be sure you are taking advantage of all the valuable benefits your ISCPA membership has to offer. Whether you joined to support our advocacy efforts, count on us for top-notch CPE, or appreciate opportunities for peer-to-peer connections, we have more for you to discover.

Watch for your membership renewal on May 1 and check out these great member benefits for the 2026-27 membership year.

Insurance

As an ISCPA member, you have access to exclusive discounts on a variety of insurance products designed to protect you, your career, and your business. Through an ISCPA partnership with AMBA, a market leader and trusted provider of affinity programs and supplemental insurance benefits, you can explore affordable insurance products tailored to the needs of accounting professionals. Member-only access to insurance savings is currently available for:

- Business Owners Insurance: Safeguard your firm with policies designed for small business owners.
- Professional Liability Insurance: Protection against claims of errors and omissions in your work.
- Cyber Liability Insurance: Defend your business from cyber threats, data breaches, and digital risks.
- Major Medical: Healthcare coverage options for members who are self-employed, between roles, or seeking alternatives to traditional employer sponsored plans.
- Emergency Transport: Coverage for unexpected medical transportation costs when every second counts.

Career Center

The ISCPA Career Center available on our website (<https://careers.iacpa.org/>) is full of excellent career resources and opportunities. The Career Center provides benefits to both members seeking talent for your organization and individuals searching for a new opportunity. Members posting job openings

enjoy discounted pricing and convenience of coordinating posts with other sites such as LinkedIn and ZipRecruiter. Job seekers have access to articles, career advice, interview tips and job offer evaluations.

College savings

ISCPA members qualify for Upper Iowa University's Gold Grant thanks to our partnership. Members and their spouses and children are eligible for savings of \$275 per course, on courses worth two credits or more, taken online or in-person through UIU. Learn more about this opportunity at uiu.edu/iscpa.

Free CPE

Our Members-Only Free CPE Series helps you expand your knowledge and skills. The total value of this benefit alone is more than your annual membership dues! In the 2025-26 membership year ending on April 30, this series offered 12 sessions with a great variety of topics. Even with member discounted CPE pricing, the value exceeds \$580!

CPE tracking

As a member, ISCPA's My CPE Tracker automatically records the credit hours you earn from our courses. You can also add credits earned from courses not associated with ISCPA, and it's 100% free for you. The tool provides you with a personalized log of your progress, plus the Iowa Accountancy Examining Board accepts the My CPE Tracker transcripts when auditing CPE credits.

ISCPA Link

Get answers to your questions with ISCPA Link! Take advantage of your member-only online community to discuss professional issues, post questions and

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Photo: Payton Shields: Pella, Iowa

ISCPA community connections

PROFESSIONAL OPPORTUNITIES UPDATE

ISCPA
IOWA SOCIETY OF CPAs



Summer Community Connections *An opportunity to connect, learn and be heard*

Looking for a meaningful way to connect with fellow accounting professionals in your area? ISCPA's Community Connections events offer a welcoming, town hall-style environment where your participation is key to their success.

These gatherings are open to member CPAs, accounting students and professionals at every stage of their careers. Each session is designed to spark conversation, strengthen connections and keep you informed on what's shaping the profession in Iowa.

ISCPA CEO Carrie Steffen will kick off each event with a Professional Opportunities Update, sharing insights on trends, challenges and emerging opportunities. From there, the floor is yours—ask questions, share perspectives and engage in open dialogue with peers and ISCPA leadership.

Whether you're looking to expand your network, stay informed or simply reconnect with colleagues, Community Connections offers a valuable and relaxed setting to do just that. Feel free to bring a friend or colleague along, just be sure to register everyone attending.

Why attend?

- Connect with local peers in your surrounding community
- Gain insights into the future of the profession
- Share your thoughts directly with ISCPA leadership
- Stay engaged with issues that impact your work

Event Locations

June 5: West Des Moines, Iowa Society of CPAs office

June 16: Oskaloosa, Oskaloosa Public Library

June 17: Atlantic, Atlantic Public Library

June 19: Spencer, Clay County Heritage Center

June 25: Marion, Marion Public Library

Join us in a community near you and be part of the conversation shaping Iowa's accounting profession. Free to attend.

Register today at www.iacpa.org/cc26.



When “administrative tweaks” aren’t just administrative

Why bills like HF 2666 matter to the future of licensure

By ISCPA CEO Carrie Steffen

It’s easy to skim through a bill that sounds “procedural” and assume it’s harmless, especially when the changes are described as simply shifting administrative duties. But in professional regulation, small structural moves can create big ripple effects. Over time, those ripples can reshape (or even erase) the very systems that keep licensure strong, preserve practice mobility, protect the public, preserve trust, and uphold the value of our credentials.

One example is the Department of Inspections, Appeals and Licensing (DIAL) bill **HF 2666**, introduced in the 2026 Iowa legislative session. The bill is framed broadly as one that “relat[es] to... licensed professions and the duties of the professional licensing boards,” including **applications, renewals, and fees**. As of March 26, DIAL has agreed to table the bill and delay the implementation of its licensing database. It is likely to be reintroduced in the next legislative session.

On the face, centralizing pieces of administrative activities might sound like a modernization effort. But here’s the concern: when responsibilities migrate away from a profession-led board and into a centralized agency structure, you don’t just change who processes paperwork, you change the balance of authority and the long-term narrative about overall necessity of boards altogether.

The ripple effect: from “streamlining” to sidelining

Professional boards exist for a reason. The Iowa Accountancy Examining Board is created in statute to **administer and enforce** accountancy law. DIAL itself acknowledges that boards “uphold professional standards, protect public health and safety, and ensure compliance with state laws.”

When legislation starts transferring core functions, especially the functions that define how a professional board interfaces with licensees (applications, renewals, and fees), it can gradually repurpose the board to advisory rather than governing. In HF 2666’s bill explanation, the emphasis is repeatedly on expanding “the duties of the department” and striking or repealing various board-related provisions across professions. That broader pattern matters.

Why CPAs should pay attention even if the bill isn’t “about us” (yet)

Once a centralized model is established, future proposals become easier to justify:

- “We already handle renewals through the department—why maintain the board structure?”
- “If the department can set fees, manage licensing operations, and route enforcement, what’s left for the board to do?”
- “If boards are redundant, shouldn’t we reduce them—or eliminate them—to cut costs?”

That’s how incremental changes can become a blueprint for **all-out board elimination**. When boards disappear, deregulation pressures often follow—as do fewer profession-specific safeguards, weaker enforcement mechanisms, and reduced public confidence in what a license represents.

For CPAs, that’s not theoretical. Our license is a public trust credential. The board model helps ensure that standards are set and enforced with meaningful profession expertise, not simply for administrative convenience.

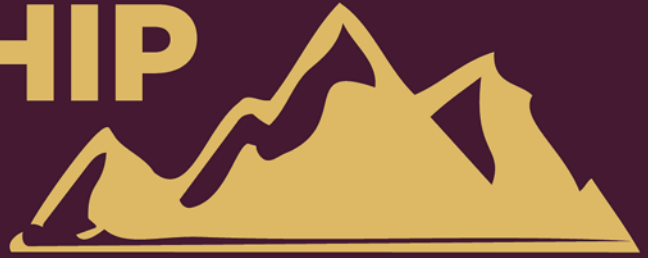
What members can do

This is the moment to treat “minor” legislation seriously—because the downstream consequences can be anything but small. Monitor bills like HF 2666, ask questions about what is being shifted and why, and remind policymakers that licensure is not just a transaction; it’s an economic framework for Iowa.

ISCPA will continue tracking proposals that affect professional regulation and the integrity of CPA licensure in Iowa. If you’re willing to engage—through a message, a call, or a meeting—your voice helps keep the long-term stakes visible.

IOWA SOCIETY OF CPAS

LEADERSHIP SUMMIT



Thursday, May 7
Courtyard Marriott, Ankeny

**We are back
with another rewarding
Leadership Summit for 2026!**

This event is full of opportunities to connect, learn and lead:

- Networking
- Annual ISCPA business meeting
- Awards presentation
- Facilitated leadership workshop

Event Gold Sponsor

**THE
RESERVES
NETWORK**

Enjoy time with peers, participate in the annual business meeting and board elections, and celebrate our Outstanding Committee Chair and Distinguished Service winners. Be ready to engage in a hands-on leadership workshop designed to elevate your professional journey.

Whether you're a seasoned ISCPA volunteer or looking to get more involved, this event is your gateway to growth and success within ISCPA. Best of all, it's free for members! Don't miss out on this exciting opportunity to shape your future and help strengthen the CPA profession in Iowa.

Go to www.iacpa.org/26ls for more information.

iscpa
IOWA SOCIETY OF CPAS



April is National Volunteer Month

ISCPA is grateful for member volunteers

April marks National Volunteer Month, a time to recognize and celebrate the individuals who generously give their time, expertise and passion to support others. At ISCPA, we are incredibly grateful for our dedicated member volunteers who play a vital role in advancing our mission and strengthening the accounting profession across Iowa.

Thank you to all ISCPA volunteers! We recognize that your time is valuable, and we deeply appreciate your decision to share it with us. Whether you serve on committees, take on leadership roles, support pipeline initiatives, engage in student outreach or participate in community service efforts, your contributions make a meaningful difference.

Your commitment helps shape the future of the profession by inspiring the next generation, enhancing learning opportunities and ensuring the success of our programs and events. Because of you, ISCPA continues to grow, innovate and positively impact our members, the next generation of accounting students and communities across Iowa.

During National Volunteer Month, we celebrate you, not just for what you do, but for the spirit of service and leadership you bring to our organization. Thank you for your continued dedication and for being an essential part of ISCPA.





Continued from page 2

to discuss professional issues, post questions and share knowledge within a secure space. This easy access tool allows ISCPA members to conveniently connect. You control how often you receive email alerts and can even choose the day and time if you prefer a weekly synopsis. Access this from the link at the top of the ISCPA home page.

Discounted CPE

Beyond the free CPE we make available to members, ISCPA provides deep discounts for quality professional education. With an eye on members' needs, we continue to deliver the highest quality events and initiatives. From an ever-expanding list of highly-rated online learning choices to our growing outreach to younger generations, we equip members with new skills and knowledge while expanding the minds of those seeking more on trending topics in the profession.

Free Mock CPA Exam

April 22 or June 3

Student members and recent graduates should take advantage of these virtual CPA Exam simulations! ISCPA has partnered with Surgent CPA Review to offer CPA exam candidates a way to test their performance on one exam section of choice, simulating the environment and format of the CPA Exam. Participants will receive an Exam ReadySCORE with diagnostic report aligned with the CPA Exam Blueprints.

Advance registration is required. Register at www.iacpa.org/MOCKCPA. Contact Lindsey Haley at lhaley@iacpa.org with questions.

Make connections

Being engaged with your state society can lead to opportunities you've never thought possible. Attend an in-person conference or connect with others through discussions on ISCPA Link. Join a resource group or committee or participate in Iowa CPAs Month of Service. Becoming more engaged means you build relationships with amazing people!

April is the final month of our membership year. Your annual membership renewal period begins May 1. Watch for your renewal statement in your inbox, mail, or visit www.iacpa.org/renew. Please consider using our secure online renewal process or ACH option. Invest in yourself, ISCPA and your profession by renewing your membership in May.

A promotional graphic for the Free Virtual Mock CPA Exam. It features the ISCPA logo at the top right, with the text "FREE VIRTUAL Mock CPA Exam" in large, bold letters. Below that, it says "APRIL 22 or JUNE 3" and "Details and registration at www.iacpa.org/mockcpa". The background is dark blue with a subtle image of a laptop.

AMA Iowa seeks CPA for board

American Marketing Association (AMA) Iowa's Board of Directors is looking for a VP of Treasury for the next fiscal year starting 7-1-26 and wants a CPA to fill the role. This is a three-year commitment of approximately 4-6 hours per month. Visit www.amaiowa.com to learn more about the organization and contact ISCPA member Ben Currie at ben@amaiowa.com with questions or interest.

2025-2026

YEAR IN REVIEW

MEMBERS BY THE NUMBERS

3,841 Members

1,025 Student Affiliates

The Iowa Society of CPAs is reflecting on this year's milestones. We not only want to share some highlights but also extend our thanks to everyone involved in driving the organization's success. ISCPA thrives on engaging members in all areas of focus and career stages. We look forward to seeing what we will accomplish together in 2026-27.

Membership engagement

More than 100 ISCPA members attended one of 13 in-person Community Connections events scattered across the state from Decorah to Burlington and Storm Lake, with more planned for the coming year.

The October Sips & Socialize Networking Event in partnership with nine sponsors attracted more than 150 CPAs, bankers, lawyers, and financial professionals to connect in Des Moines.

ISCPA introduced a new member benefit through a partnership with AMBA to provide health, business and personal insurance products such as professional liability, major medical, medical transportation coverage, cyber liability and more.

CPA licensing pathways

ISCPA's legislation to enable future CPA candidates to be licensed in Iowa upon earning a bachelor's degree with required accounting coursework, two years of experience and passing the CPA Exam was signed by the governor with an effective date of July 1, 2026. The Iowa Accountancy Examining Board is working on the rules to guide us through this exciting new option for a CPA license in Iowa.

Learning

- ISCPA promotes lifelong learning for accounting professionals. Our goal is to make Iowa CPAs future-ready and successful in their professional endeavors.
- Our Free Members-Only CPE Series featured 12 hours of complimentary professional education. Each session attracted an average of 100 attendees, covering a diverse range of topics crucial to members.
- ISCPA's conference lineup continues to expand, offering more opportunities to learn and connect than ever before. In 2025, ISCPA hosted 16 conferences spanning a wide range of topics and industries.
- AI remains a leading topic of interest, and ISCPA is at the forefront - hosting multiple seminars focused on the latest developments, trends and practical strategies.
- The biennial Farm Tax Update continued to demonstrate its strong relevance, drawing 440

attendees and collaboration from eight state CPA society partners.

- The complex world of multistate taxation is both nuanced and constantly evolving. In 2025, the annual Multistate Tax Update grew in popularity, attracting more than 400 attendees from across seven Midwest states.

Academic and career development initiatives

Staff and members visited nine community colleges and 14 four-year colleges and universities. | Accounting Opportunities Experience attracted **42** ISCPA members to reach over **1,100 high school students** in **59 classrooms** of 42 schools across Iowa. | The new ISCPA High School Accounting Showcase held at DMACC in Ankeny and Morningside University in Sioux City allowed more than **300 high school students** from **29 high schools** to put their skills to work on a real forensic accounting case and presentation. **49 volunteers** attended to share more about the CPA profession and answer student questions | Our Career Awareness committee is composed of **85 passionate members** serving on four subcommittees to help plan and drive the success of these outreach events and more.

Interested in speaking with students about the accounting profession? Contact ISCPA Student and Future CPAs Coordinator Josie Hove at jhove@iacpa.org or **515-985-7104** to get signed up!

Iowa CPAs Month of Service

This community service event represents the profession's ongoing commitment to give back to local communities through volunteer efforts. In 2025, nearly 500 volunteers comprised of 32 teams and individual members participated in volunteer activities.

Iowa CPA Education Foundation



OUR PROGRESS scholarships awarded



Join ISCPA's 100% Membership Commitment Program

Support the CPA profession and become a 100% Membership organization today

The Iowa Society of CPAs recognizes firms, businesses and organizations that commit to ensuring 100% of its CPAs are ISCPA members. Participation in the program sets your organization apart and demonstrates your dedication to the CPA profession.

Workforce development

Your membership supports ISCPA's efforts to grow the accounting pipeline, which helps you find, retain, and develop future leaders at your organization. ISCPA raises awareness of the profession and promotes accounting as a desirable career path to students.

Recognition

ISCPA 100% organizations will be recognized with a direct link to your website and logo on the ISCPA site, in the Iowa CPA newsletter, and at the Society's two signature events – the ISCPA Leadership Summit in May and the Circle of Excellence in September. In addition, you will be provided with a special logo identifying your organization as having 100% ISCPA membership for use on your website to help recruit staff and clients.

Advocacy

Your membership amplifies the voice of the profession in the Iowa Legislature, as we advocate to protect the integrity of the CPA license and support positive legislative and regulatory outcomes for our members. In addition, we are your liaison to the Iowa Department of Revenue and the Iowa Accountancy Examining Board, helping to resolve your issues and concerns.

Convenience

Expedite the annual membership renewal process and save time with group billing. You, or your group administrator, will receive one annual invoice for your entire staff instead of multiple individual invoices.

Investment

Investing in the Society means investing in a smarter, more future-ready team. Your people stay connected to the profession while gaining access to high-quality learning opportunities, without adding to your internal workload.

ISCPA's Members-Only Free CPE Series alone delivers up to \$580 in annual value per CPA, helping you maximize both development and budget.

It's a simple way to invest in your people and their careers.

100% Membership Commitment Program FAQs

Q. Which firms or businesses are eligible for the 100% Membership Commitment Program?

A. All firms or businesses with offices in Iowa that employ at least two full-time CPAs are eligible, including CPA firms, individual practitioners, private and public companies, nonprofits, local governments, state governmental departments and universities.

Q. Is there a fee?

A. No, there is not a fee to be a part of the program other than individual annual memberships for all employed CPAs.

Q. What are the criteria to be eligible for the program?

A. All full-time CPA employees and partners on staff in the organization's Iowa offices must be enrolled as members in ISCPA. This should be confirmed annually in conjunction with the membership renewal period (May 1).

Q. How do we enroll?

A. Contact ISCPA Director of Membership Lindsey Haley at lhaley@iacpa.org or 515-985-7125 to request a report of current ISCPA members at your company or firm, along with instructions for achieving 100% membership.

WELCOME!

The following individuals have recently joined the Society. Please take time to welcome them and invite them to participate in events and programs with you. Find these members in ISCPA's Member Directory at www.iacpa.org/my-cpa.

Resident Member

David Wacht

Frederick M Swartz & Co PC
Fairfield

Affiliates

Sally Downing

City of West Des Moines
West Des Moines

Nate Wheeler

RSM US LLP
Davenport

Student Members

Buena Vista University

Maggie Vaske-Casey

Central College

Ashlynn Brackett

Clarke University

Payton Gaughan

Colorado Christian University

Jeannie Cannon

Dordt University

Emily Van Soelen

Drake University

Alexi Fernandez
Aiden Volp

Eastern Washington University

Karl Ackerman

Graceland University

Kellen Scruggs

Grand View University

Lesley Oblea

Iowa Central Community College

Emmanuel Bingham
James Craig
Adalyn De Jong
Tayla Wempen
Janea Widmann

Iowa State University

Skylar Haenzi
Noah Mulford
Avery Stevens

Luther College

Rachel Borchardt
Dylan Muhlbauer

Northwest Missouri State University

Ashley Johnson

Simpson College

Ashley Angel
Jonathan Barrios-Munoz
Dalton Ferrin
Levi Gurwell
Emily Harrold
Luke Mayer
AJ Mosqueda
Kristen Roe
Johnathon Terpstra

St Ambrose University

Mattie Gillen

University of Iowa

Braeden Brown
Blake Buresh
Clara Carlson
Quinn Cleary
Araya Coglianese
Jack Defend
Drew Doran
Sai Durbha
Carter Fitzgerald
Mason Froebe
Jack Guio
Ethan Hogue
Mackenzie Ignjatic
Hank Jones
Jacob Josten
Cael Julander
Kinnick King
Jackson Kramer
Kinnick Lechtenberg
Jonah Loiterstein
Drew Loney
Jazmin Maceda
Courtney Malliet
Daniel Marketti
Gabe Mason
Jack Musker
Emily Nichols
Raymond Nugent

Reese O'Donnell

Adi Patel
Landis Pietrzak
Jack Pogemiller
Thomas Potts
Mike Rew
Parker Rice
Josie Seitz
Bryce Smith
Reece Trinder
Joshua Urmie
Brennan Wagner
Ryan Weier
Julia Whipple
Ben Wilkowski
Nathan Woods
Kali Yelm
Benjamin Ziegler

University of Northern Iowa

Kelsie Goedken

Upper Iowa University

Binh Truong

Wartburg College

Caleb Olson

Western Governors University

Brice Woodard

Members in the news

Congratulations to our members who are reaching new milestones in their careers! We're thrilled to celebrate your recent promotions, new positions, and well-deserved recognitions.

Emily Box, Forvis Mazars LLP, West Des Moines, has been promoted to senior associate.

Maya Char, Denman CPA, West Des Moines, has been promoted to senior accountant.

Lindsay Chase, Holmes Murphy & Associates, Waukee, has been appointed to the board of Holmes Murphy Board of Managers.

Broden Coulter, Forvis Mazars LLP, West Des Moines, has been promoted to manager.

Nathan Halstead, Forvis Mazars LLP, West Des Moines, has been promoted to senior manager.

Nicole Hansman has been hired by EMC Insurance Companies, Des Moines, as assistant vice president-corporate tax.

Brandt Heintz, Meriwether, West Des Moines, has been promoted to senior associate.

Andrew Hingst has been hired by Hansen Company, Johnston, as senior accountant.

Chris Hodgson has been hired at Critical Materials Recycling, Boone, as CFO.

Carter Hovey, Meriwether, West Des Moines, has been promoted to senior associate.

Kyle Kunz, Corridor Market Leader, Shareholder, Honkamp PC, Hiawatha, has been named to the Corridor Business Journal/Quad Cities Regional Business Journal Iowa 500 List of the Most Influential Business Leaders.

Nick Laing, Forvis Mazars LLP, West Des Moines, has been promoted to senior manager.

Kara Lindhoff, Meriwether, West Des Moines, has been promoted to senior associate.

Brock Martin, Forvis Mazars LLP, West Des Moines, has been promoted to senior manager.

Brian Schult, Axonic Insurance, Clive, has been promoted to senior director, internal audit & ERM.

Michelle Steining, Quad Cities Market Leader, Shareholder, Honkamp PC, Davenport, has been named to the Corridor Business Journal/Quad Cities Regional Business Journal Iowa 500 List of the Most Influential Business Leaders.

Katie Thomas, President & CEO, Shareholder, Honkamp PC, Dubuque, has been named to the Corridor Business Journal/Quad Cities Regional Business Journal Iowa 500 List of the Most Influential Business Leaders.

Connor Wiseman, Meriwether, West Des Moines, has been promoted to supervisor.

Amy Wolfgram, Forvis Mazars LLP, West Des Moines, has been promoted to manager.

Mitchell Van Es has been hired by Doerfer Corporation, Waverly, as corporate controller.

Jesse Van Wyk has been hired by Financial Integrators, Des Moines, as an accounting and tax consultant.

Regan Wasson has been hired by Elite Casino Resorts, Riverside, as senior staff accountant.

In Remembrance

ISCPA offers condolences to the families of:

Susan Taber of Des Moines, passed away June 23, 2025. She had been an ISCPA member since 1977.

Mike Wiskirchen of Johnston passed away March 13, 2026. He had been an ISCPA member since 1982.

Elevate your expertise at a May signature conference

Iowa Governmental Roundtable

May 12 | Live Virtual Conference

This unique virtual conference is designed specifically for CPAs and accounting professionals working in or with government entities. Gain timely insights and analysis on the continually evolving rules and regulations impacting governmental agencies and those who work alongside them.

Find more details at www.iacpa.org/igr.

Audits of Employee Benefits Plans Conference

May 18 | Live Virtual Conference

Tackle employee benefit plans with confidence at the Audits of Employee Benefit Plans Conference. Dive into case studies on audit pitfalls to avoid common mistakes and apply practical solutions. Gain a deeper understanding of ESOPs and how they differ from typical 401(k) audits. Learn about the various types of audits and identify the tripping points to navigate challenges effectively.

Find more details at www.iacpa.org/ebp.

Estate, Gift and Trust Conference

May 20 | Live Virtual Conference

Safeguard your clients' assets in the current market with in-depth insights into the latest developments in estate planning, tax strategies and wealth preservation. Featuring expert-led sessions on evolving tax laws, trust administration and economic updates. Stay ahead of industry trends and gain practical guidance to better serve your clients in an ever-changing financial landscape. Find more details at www.iacpa.org/egt

Financial Institutions Conference

May 28 | West Des Moines & Live Webcast

Connect with CPAs and financial professionals at the ISCPA Financial Institutions Conference for a deep dive into the latest trends, innovations, and challenges shaping the banking industry. Gain expert insights, engage in meaningful discussions with industry leaders, and strengthen your professional network in this essential event for financial professionals working in or with financial institutions.

Find more details at www.iacpa.org/fic.

CPAImpact: Leadership Academy 2026-2027

Got a rising star on your team ready for more leadership responsibilities? CPAImpact is built for them.

This brand-new, premier program is designed to shape the next generation of Iowa CPA leaders. Through hands-on learning, real-world experiences, and powerful networking opportunities, participants strengthen key skills like communication, emotional intelligence, critical thinking and so much more.

And it doesn't stop there. CPAImpact goes beyond traditional training, offering opportunities to engage in advocacy, mentor emerging professionals and broadening professional influence. It's not just about building skills - it's about expanding impact and stepping confidently into a leadership role.

This multi-faceted program will begin in fall 2026 and wrap up in early 2027. A limited number of seats are available, so sign up early. Find information at www.iacpa.org/cpaimpact.

New AI Series launching in May

Artificial intelligence (AI) is no longer a future concept - it's already reshaping the accounting profession. From automating routine tasks to enhancing data analysis, AI is changing how CPAs work and the value they deliver. New tools, evolving regulations and emerging risks mean today's knowledge can quickly become outdated. For CPAs, staying informed isn't optional, it's essential to maintaining relevance, protecting clients and identifying new opportunities for growth.

To help you navigate this evolving landscape, we're launching a new AI series featuring four convenient virtual sessions in the spring and in the fall. This flexible format allows you to stay current throughout the year while fitting professional development into your schedule. Save more if you register for a bundle webinar package!

AI isn't replacing CPAs, but CPAs who understand AI will lead the way forward. Join us as we explore how to harness this technology with confidence and clarity.

Learn more at www.iacpa.org/26aiseries.

Spring/Summer Series:

- **May 1:** The AI Revolution in 2026: What CPAs Should Know
- **June 4:** AI - Better Prompts, Better Results
- **June 12:** Agentic AI for CPAs: Automate Workflows with Intelligence
- **June 17:** Ethical AI Practices for CPAs: Ensuring Responsible Use

Fall/Winter Series:

- **Oct. 16:** The AI Revolution in 2026: What CPAs Should Know
- **Oct. 23:** AI 101 for CPAs: Core Concepts and Practical Applications
- **Dec. 18:** Agentic AI for CPAs: Automate Workflows with Intelligence
- **Dec. 30:** AI - Security and Privacy Issues

Your opinion counts

Have you ever wished ISCPA offered education on a specific topic? Do you see an upcoming business challenge your organization needs help navigating? We want to hear from you about the CPE programs that would best support your work.

Share your ideas directly with Senior Director of Learning and Operations, Katie Shields at kshields@iacpa.org, or be sure to include them on your course evaluation forms when attending our education programs. As we plan our 2026 programming, we welcome your suggestions for both content and speakers.

Unlock your exclusive member benefit - Free CPE

As an ISCPA member, you receive exclusive access to more than 12 hours of FREE continuing education during the 2026-2027 membership year - a \$580 value included at no additional cost. It's just one of the many ways your membership provides meaningful benefits, helping you stay current, build your expertise and maintain your credentials without extra fees.

We're currently developing a schedule of convenient, one-hour virtual sessions designed to help you take full advantage of this member perk. Be sure to renew your membership in early May so you can continue enjoying high-quality education and resources that support your professional success. Stay up to date on upcoming sessions by visiting www.iacpa.org/cpe/freecpe regularly for the latest schedule.



2026 Conferences at a Glance

MAY 7	ISCPA Leadership Summit
MAY 11	Iowa Governmental Audits – Local Government Update
MAY 12	Iowa Governmental Roundtable
MAY 18	Audits of Employee Benefits Conference
MAY 20	Estate, Gift and Trust Conference
MAY 28	Financial Institutions Conference
JUNE 8-9	Technology Conference
JUNE 15	Technology for Nonprofit & Mission-Driven Organizations Conference
JUNE 17	Taxation on Real Estate Conference
JUNE 18	Insurance Industry
JUNE 22	Artificial Intelligence Conference
JUNE 25	Multistate Tax Update
AUG. 13	Agriculture Tax & Accounting Conference
SEPT. 17-18	Fall CPE Conference (Cedar Rapids)
SEPT. 24	Circle of Excellence Awards
NOV. 2	Preparation, Compilation and Review Update for the Local Firm
NOV. 3	Accounting and Auditing Update for the Real World
NOV. 12	Federal Tax Update: Individual and Business Current Developments
NOV. 19	Iowa Tax Update
DEC. 3	Iowa Department of Revenue Update
DEC. 7-8	Winter Federal Tax Summit with Ron Roberson
DEC. 14	Federal Tax Update: Individual and Business Current Developments (Cedar Rapids)

Visit the ISCPA website regularly for updates; dates will be added throughout the Spring.

Add these events to your calendar now!

Summer Intern Social

July 29

This is an exciting summer social hosted by the Iowa Society of CPAs, exclusively for accounting, finance and business interns! Be sure to have your interns register for an afternoon filled with networking opportunities, fun activities, and valuable insights into the world of accounting.

Sips & Socialize Networking Event

Oct. 22

Come socialize in a relaxed atmosphere at this networking event for Iowa's CPAs, bankers, lawyers, and financial professionals. This is one of our most popular social activities of the year.

MEET OUR ISCPA STAFF



HOLLY MUEGGENBERG

POSITION: Conference and Member Events Manager

ALMA MATER: Iowa State University

HOMETOWN: Carroll, Iowa

PROFESSIONAL ACTIVITIES: Committee member, Meeting Professionals International

First job:

I delivered the daily newspaper on a route in our neighborhood.

Tell us about your career history:

I have spent my whole career working in associations. I enjoy helping others make connections for a positive impact on their business. Utilizing my organizational skills led me to explore the events side of association work.

People don't know this about me, but:

I enjoy NASCAR and someday would like to skydive.

What attracted you to join ISCPA?

The team. Everyone was so welcoming and excited to have me come onboard.

If I weren't an association professional, you might find me working as...:

A travel agent. I really love to plan events and I enjoy traveling, so it would be a perfect combination of the two.

My favorite thing about my ISCPA role so far:

Learning. There is so much I know about associations from my past experience, but joining a new team with a new member focus is exciting. I am looking forward to learning more about how I can help the team and meeting ISCPA members.

I never leave home without:

My phone - mainly for the camera. I love taking pictures to capture adventures and life's moments.

Favorite food: Italian food of any kind.

Favorite app: My online library app.

When I have free time: I enjoy scrapbooking, reading and playing board games with family and friends.

Favorite movie: The Cutting Edge

Favorite vacation spot: Anywhere new and explored with my family.

Favorite band or musician: Luke Combs and Dave Matthews Band

Best concert you've been to and where: Oh, so hard to choose. I love going to concerts and have really enjoyed them because of who attended them with me.

Three words that describe me best: Organized, mom, friendly.

Place I'd love to live: Close to my family.

I'm passionate about: Organization - because it directly impacts team success. I genuinely enjoy bringing structure to complex projects; setting up systems, timelines, and tracking tools that keep everything moving forward.

Holly and her husband Jeff reside in Polk City with their children, Emily and Drew.



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The 2026 Financial Institutions Conference brings together CPAs and other professionals working in or with the banking industry to discuss the latest trends, innovations and challenges facing the industry today. Gain valuable insights, connect with industry leaders, and expand your network.

This premier industry event includes topics on:

- Economic & regulatory updates
- Key tax updates for financial institutions
- Ethical AI practices and insights
- Candid insights into common challenges in banking internal audit
- Emerging banking fraud trends and vulnerabilities

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May 28 | West Des Moines Marriott or Live Webcast | 8 hrs CPE

