



IowaCPA

May 2026

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

CPA IMPACT

Developing Iowa's next generation of CPA leaders

Iowa Society of CPAs ... Advancing the professional success of our members

What trust looks like in action

While celebrating National Accounting Day on May 19 was a welcome opportunity to recognize the essential role CPAs play in strengthening businesses, communities, and the public trust, it deserves more than one day. This year, you can help keep it going.

At the heart of this year's celebration is a new, interactive **digital mosaic**, launched by AICPA under the banner "**CPA: Trust in Action.**" It is a collective moment to show the impact of the profession in a powerful, visible way.

The mosaic invites CPAs across Iowa and the country to share photos that represent their pride in the profession and the trust they build every day. As individual photos come together, they form a larger picture—one that tells the story of CPA impact through real people and real moments.

ISCPA encourages you to upload a photo to the digital mosaic. Participation is simple and photo ideas include:

- A photo that highlights your Iowa pride via a landmark or college logo
- A group photo with colleagues, alum groups or others
- A milestone moment: graduation day or day you received your CPA license
- Selfie with client and/or employer who put their trust in you

By participating in the mosaic and social media activities supporting the CPA campaign this summer and fall, you are not only celebrating the profession; you are helping tell a story that resonates far beyond May 19. It's a story of expertise, integrity, and public service — told through thousands of individual voices coming together as one.

Share your photo to the mosaic. Help show others what Trust in Action looks like.

A message from your board

The ISCPA board of directors met April 24, 2026. Decisions and activities are listed below.

- Approved consent agenda items including minutes of the Dec. 5, 2025 meeting of the board and the March 24, 2026 meeting of the executive committee.
- Approved the 2026-27 budget.
- Approved the 2026-27 member dues schedule.
- Discussed and approved member dues categories for the 2027-28 membership year.
- Received a state legislative update from Carrie Steffen and Rick Tiwald.
- Received recap of recent AICPA regional meetings from AICPA representative Jim Smith.
- Received ISCPA investment portfolio update from Courtney Clark.
- Received a report from Chair Rick Tiwald with brief recap of 2025-26 accomplishments.
- Vice Chair Laura Meier thanked Rick Tiwald for his leadership as chair.
- Recognized outgoing board members.
- Discussed and approved 401(k) discretionary contribution.
- Scheduled a meeting for July 10, 2026.

ISSUE NO. 2026-05

Published by the Iowa Society of Certified Public Accountants (ISCPA).

Send address changes, advertising inquiries and all correspondence to:
1415 28th St., Ste. 450
West Des Moines, IA 50266

Email: iacpa@iacpa.org
Website: www.iacpa.org
Phone: 515-223-8161 or 800-659-6375
Cover photo: Lindsay Brown on Unsplash

CPAImpact aims to develop Iowa's next generation of CPA leaders

Strong leadership has never been more important to the accounting profession. As firms and organizations navigate workforce changes, evolving client expectations and increasing business complexity, the need for confident, adaptable leaders continues to grow.

To help meet that need, ISCPA has launched **CPAImpact**, a new leadership academy designed to prepare emerging Iowa CPA leaders for the next stage of their careers.

CPAImpact Leadership Academy combines immersive learning, practical application and meaningful peer connections to help participants strengthen leadership skills that extend far beyond technical expertise. The program focuses on communication, emotional intelligence, critical thinking, accountability, delegation and change management — all essential qualities for professionals preparing to lead teams, organizations and the profession itself.

“CPAImpact is different than a lot of leadership development programs available,” ISCPA CEO Carrie Steffen said. “It strengthens participants’ connection to other CPAs in Iowa, focuses specifically on CPA leadership – built around the strengths that CPAs uniquely bring to their finance leadership role, and teaches CPAs how to become advocates for the profession in Iowa, which is more important than ever.”

The academy is designed specifically for accounting professionals ages 25 to 35 who have at least three years of experience and are currently serving at the senior or manager level or are on a path toward advancement. Participants must be active ISCPA members at the time of enrollment.

Participation is limited to 25 individuals to encourage collaboration and personalized learning experiences.

The program begins with a two-day, in-person leadership immersion workshop in October. The workshop will be led by Jon Lokhorst, CPA, a leadership coach and former chief financial officer with more than 30 years of leadership experience.

During the workshop, participants will explore their leadership styles while developing practical strategies they can immediately apply within their organizations. Through hands-on activities, guided discussions and peer collaboration, attendees will

focus on real-world leadership challenges and solutions. The workshop also includes professional headshots for participants.

Learning continues after the in-person workshop through an exclusive virtual progress check-in with Lokhorst. The session is designed to help participants evaluate their leadership growth,

The graphic features a blue background with the text 'CPA III IMPACT' in large, bold, white letters with a yellow outline. Below this, a yellow banner contains the text 'Leadership Academy 2026 - 2027'. Underneath the banner, the slogan 'Influence. Lead. Inspire.' is written in white, followed by 'Enroll by Sept. 1 to secure your spot!' in a smaller white font. The ISCPA logo, consisting of the word 'iscpa' in white lowercase letters and 'IOWA SOCIETY OF CPAs' in smaller white uppercase letters below it, is positioned in the bottom right corner.

reinforce lessons learned and maintain momentum as they continue developing professionally.

CPAImpact also emphasizes leadership through advocacy and service.

Participants will take part in Iowa CPA Day at the Capitol, where they will gain firsthand insight into the legislative process while learning how advocacy helps shape the future of the profession. The experience is intended to help participants strengthen their communication skills and confidence while engaging with policymakers and industry leaders.

To further develop skills and spotlight CPA leaders' role in giving back, participants will volunteer at the spring High School Accounting Showcase, an experience that blends leadership and mentorship. Volunteers will evaluate student presentations, provide feedback and help students develop teamwork, communication and critical-thinking skills.

The program concludes with recognition during the 2027 ISCPA Leadership Summit, where participants will be honored for their dedication to developing leadership skills and successfully completing the academy.

Upon completion of all sessions and events, participants will earn a total of 18 hours of CPE credit.

CPAImpact benefits not only individual participants, but also the organizations that support them. Employers who invest in leadership development help strengthen succession planning, employee engagement and long-term organizational growth.

"This program provides a critical element of Iowa CPA workforce development by advancing skills in areas such as change management, strategy, communication and emotional intelligence which are central to the advisory role of CPAs, Steffen added. "At the same time, organizations benefit by developing leaders who can guide teams, manage change and contribute to long-term success."

Enrollment for **CPAImpact** closes Sept. 1, unless the program reaches capacity sooner. Early registration is encouraged.

More information, including eligibility requirements and program details, is available on the ISCPA website at www.iacpa.org/impact.

ISCPA
community connections
NEAR YOU IN JUNE

Your 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.

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.

We want to see you! Choose a date and location that works best and register today:

June 12 | West Des Moines | Iowa Society of CPAs office

June 19 | Spencer | Clay County Heritage Center

June 16 | Oskaloosa | Oskaloosa Public Library

June 25 | Marion | Marion Public Library

June 17 | Atlantic | Atlantic Public Library

Nominate ISCPA members for awards by June 15



We need to hear from you! It's time to recognize your fellow ISCPA members. Do you know an Iowa CPA who demonstrates commitment to the profession and has made a positive difference in the business and/or general community? Nominate them for one of these ISCPA awards to be presented at the ISCPA Circle of Excellence Awards on Sept. 24. Send us your submissions by the June 15 nomination deadline.

Public Service Award

Recognizes an Iowa CPA who has exhibited a distinguished record in their work for nonprofit, charitable or civic organizations. Nominees will be judged by their voluntary participation in one or more organizations over periods of time in their local community, the state of Iowa, or the nation.

Outstanding CPA in Business and Industry

Honors the achievements of an Iowa CPA in business and industry and promotes the CPA certificate as the preferred credential for business. Candidates are judged for having made a significant contribution to the growth and success of their employer or to a notable entrepreneurial achievement.

Rising Star Award

Recognizes the accomplishments of younger members who are emerging as leaders. Candidates must be 40 or younger and a volunteer for ISCPA, with a civic or charitable organization, or with another professional association.

For more information and nomination forms, visit www.iacpa.org/cpa-awards.



In the age of AI, trust still belongs to internal auditors

By Elizabeth McDowell, CPA, CIA

Every day, we are inundated with information about artificial intelligence.

Headlines promise efficiency gains and amazing transformations. Vendors showcase tools that can draft reports, analyze data, and make decisions in seconds. At the same time, we are warned about bias, hallucinations, deepfakes, and misinformation.

The result? A workforce navigating constant noise, with growing uncertainty about what – and who – to trust. We have more information than ever before, yet less certainty about what is real, accurate, and reliable.

In an environment where even supporting documentation can be artificially generated, the question becomes unavoidable: who do we trust?

The enduring role of the internal auditor

This is not a new question for the auditing profession. At its core, auditing has always been about trust.

Internal auditors serve as independent, objective assurance providers within organizations. They evaluate risks, assess controls, and provide insights that help organizations operate with integrity and efficiency. Their work is grounded in ethical principles that are more relevant today than ever before: objectivity, independence, confidentiality, competency, and due professional care.

Auditors are trained to ask the questions others may overlook:

- Where did this information come from?
- What assumptions underpin this analysis?
- What could go wrong?
- How do we know this is accurate?

They do not accept outputs at face value. They seek to understand the process behind them. In a world increasingly shaped by automated decisions and AI-generated outputs, that approach is not just valuable – it's essential.

Why auditors matter more in the age of AI

Artificial intelligence is often framed as a tool for efficiency. And it absolutely is. But efficiency at what cost – to businesses, people, and our values?

AI systems can process vast amounts of data, but they also amplify errors, embed bias, and produce outputs that appear credible but are fundamentally flawed or just plain wrong. As organizations race to adopt these tools, the speed of decision-making is accelerating – sometimes faster than the governance and controls designed to govern it (and in many cases, those structures are still evolving or not yet in place).

This is where internal auditors become indispensable. Internal auditors bring discipline and assurance to an environment that is rapidly evolving and, at times, poorly understood. They help organizations pause, assess, and validate before fully trusting AI-driven outputs. In other words, as technology moves faster, internal auditors ensure we do not move without asking the right questions.

How internal auditors add value in an AI-driven world

Internal auditors are uniquely positioned to help organizations navigate the risks and opportunities of AI. Auditors help organizations validate reliable information and distinguish between reliable, accurate information and outputs that may be misleading or unsupported. They evaluate data sources, model inputs, and governance processes to ensure decisions are based on sound foundations.

From data privacy and security to model bias and performance drift, AI introduces new and complex risks. Auditors identify these risks and evaluate whether appropriate controls are in place to mitigate them effectively.

Boards and management teams are being asked to make decisions about technologies they may not fully understand. Auditors serve as translators and teachers – bridging the gap between technical complexity and business impact, helping leaders make informed, responsible choices.

Auditors play a key role in evaluating and advising on the selection and implementation of AI tools. They consider not only functionality and efficiency, but also ethics, governance, and long-term sustainability.

AI doesn't eliminate responsibility – it redistributes it. Auditors ensure that accountability remains clear, governance structures are defined, and oversight mechanisms are functioning as intended.

A return to trust

As AI continues to reshape how organizations operate, the need for trust will only grow – not blind trust in technology, and not unquestioned reliance on outputs. But informed, validated trust – built on evidence, oversight, and ethical judgment.

This is where internal auditors shine.

In an age where information can be generated instantly and convincingly, auditors provide something that cannot be automated: confidence grounded in strong professional principles.

So as organizations navigate the opportunities and uncertainties of AI, one thing becomes clear: now more than ever, we should turn to internal auditors – not just for assurance, but for truth.



Elizabeth McDowell, CPA, CIA, is founder of Audit Forward and a seasoned internal audit leader with more than 20 years of experience. She is leading the ISCPA 2026 Internal Audit Series

ISCPA
IOWA SOCIETY OF CPAs

INTERNAL AUDIT SERIES

Bundle Webinar Package

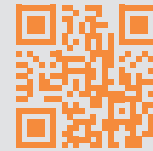
Sept. 3
Using AI to Audit Smarter, Not Harder!

Oct. 8
The Data Detective: Actionable Analytics for Internal Auditors

Nov. 5
Fraudsters Unmasked: Internal Audit's Role in Preventing Fraud



HAVE YOU RENEWED YOUR MEMBERSHIP?



Our new membership year started on May 1; if you have not yet renewed, now is the time to act before you lose access to valuable ISCPA benefits.

Benefits such as:

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!

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 share knowledge within a secure space.

CPE tracking - 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 Iowa Accountancy Examining Board accepts the My CPE Tracker transcripts when auditing CPE credits.

Discounted CPE - ISCPA provides deep discounts for quality professional education. With an eye on members' needs, we continue to deliver the highest quality events and initiatives.

CPA community - Being engaged with your state society can lead to opportunities you've never thought possible. Building connections with other CPAs provides immeasurable value for your career and personal development.

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.

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.

Visit www.iacpa.org/renew for access to our secure online renewal process. Invest in yourself, ISCPA and your profession by renewing your membership today.

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.

Rachel Bertrand

Eide Bailly LLP
Des Moines

Megan Bianchi

Ernst & Young LLP
Des Moines

Carly Bigelow

Ernst & Young LLP
Des Moines

Brendon Bruns

Lashier Bonefas Baldwin & Co PC
Shenandoah

Noah Burmeister

UHY LLP
West Des Moines

Shelby Clymer

CliftonLarsonAllen LLP
Des Moines

Alex Conrad

Ernst & Young LLP
Des Moines

Kalley Cunningham

CliftonLarsonAllen LLP
Cedar Rapids

Matt Farney

Principal Life Insurance Company
Des Moines

Paul Fritzell

Ernst & Young LLP
Des Moines

Affiliates**Morgan Albertsen**

CliftonLarsonAllen LLP
Des Moines

Luke Arens

Ernst & Young LLP
Des Moines

Jenna Beck

BakerStarrett LLP
Grinnell

John Galm

Myers and Stauffer LC
Des Moines

Cal Gebhart

CliftonLarsonAllen LLP
Des Moines

Amy Gurley

Menke & Company
Burlington

Alma Hodzic

Ernst & Young LLP
Des Moines

Davis Kennedy

MHCS PC
West Des Moines

Jaycee Knight

Ernst & Young LLP
Des Moines

Jonathan Larimore

Ernst & Young LLP
Des Moines

Makenna McDonald

RSM US LLP
Des Moines

Vanessa McElfresh

Ernst & Young LLP
Des Moines

Spencer Moon

Forvis Mazars LLP
West Des Moines

Thomas Berta

Ernst & Young LLP
Des Moines

Kolton Brandt

Ernst & Young LLP
Des Moines

Austin Brinning

Ernst & Young LLP
Des Moines

Keyton Moser

Kroese & Kroese PC
Sioux Center

Max Olsen

MHCS PC
West Des Moines

Dawson Peters

CliftonLarsonAllen LLP
Cedar Rapids

Kayla Pitz

Ernst & Young LLP
Des Moines

Anna Sanders

Forvis Mazars LLP
West Des Moines

Caleb Shumaker

DS Webb & Company PC
Tipton

Joey Sweetwood

Ernst & Young LLP
Des Moines

Christopher Williams

UHY LLP
West Des Moines

Kylie Winkler

Forvis Mazars LLP
West Des Moines

Michelle Bui

Ernst & Young LLP
Des Moines

Val Burkhart

The Capital Collective
Clive

Dan Burleson

Ernst & Young LLP
Des Moines

Miranda Burnett
Ernst & Young LLP
Des Moines

Kristi Burns
BakerStarrett LLP
Grinnell

Haley Christensen
Ernst & Young LLP
Des Moines

Steven Colby
Ernst & Young LLP
Des Moines

Allen Cook
Goodman & Hayes CPAs PLLC
Ottumwa

Kacey Croghan
Ernst & Young LLP
Des Moines

Jacob Davis
Welgaard CPAs and Advisors
Pella

Peri Dodd
Ernst & Young LLP
Des Moines

Jami Dolezal
Ernst & Young LLP
Des Moines

Olivia Engler
Ernst & Young LLP
Des Moines

Ben Evitts
RSM US LLP
Davenport

Dylan Falck
Ernst & Young LLP
Des Moines

Arianna Fischer
Ernst & Young LLP
Des Moines

Colton Fitzpatrick
Welgaard CPAs and Advisors
Altoona

Javarius Foreman
Ernst & Young LLP
Des Moines

Mitchel Fox
Ernst & Young LLP
Des Moines

Erika Fuccio
Ernst & Young LLP
Des Moines

Jose Galdeano Hernandez
Ernst & Young LLP
Des Moines

Joe Gebauer
Ernst & Young LLP
Des Moines

Richelle Gentile
Honkamp PC
Dubuque

Greta Glaser
Hacker Nelson & Co PC
New Hampton

Lexi Gootee
Ernst & Young LLP
Des Moines

Michelle Graham
CliftonLarsonAllen LLP
Cedar Rapids

Elijah Green
Ernst & Young LLP
Des Moines

Nathaniel Green
Gross & Company PLLC
Dunlap

Taylor Green
Ernst & Young LLP
Des Moines

Owen Hamel
Ernst & Young LLP
Des Moines

Shawn Healy
Aureon
West Des Moines

Lena Hewitt
CliftonLarsonAllen LLP
Cedar Rapids

Megan Hixson
Ernst & Young LLP
Des Moines

Garrett Hlubek
Winkel Parker & Foster CPA PC
Clinton

Josie Holke-Farnam
Ernst & Young LLP
Des Moines

Noelle Hurula
Eide Bailly LLP
Dubuque

Andrew Hutchcroft
Ernst & Young LLP
Des Moines

Marisa Jepsen
Ernst & Young LLP
Des Moines

Bill Johnson
Ernst & Young LLP
Des Moines

Makenna Junge
Ernst & Young LLP
Des Moines

Alex Knipp
Ernst & Young LLP
Denver, Colo.

Lundin Knudsen
Ernst & Young LLP
Des Moines

Tyler Koopmeiners
Kuhl Phillips & Jans Inc
Coralville

Riley Korczak
Ernst & Young LLP
Des Moines

Amy Larson
Fort & Schlegel CPA PC
Fort Dodge

Ryan Larson

Ernst & Young LLP
Des Moines

Mattie Lehman

Ernst & Young LLP
Des Moines

Leayla Liebich

Ernst & Young LLP
Des Moines

Adam Maharry

BakerStarrett LLP
Grinnell

Jacob Martin

Ernst & Young LLP
Des Moines

Brandon Matson

Welgaard CPAs and Advisors
Pella

Andrew McIntosh

Ernst & Young LLP
Des Moines

Taylor Mead

Ernst & Young LLP
Des Moines

Katelin Meier

Ernst & Young LLP
Des Moines

Shane Melrose

Ernst & Young LLP
Des Moines

Haley Meyer

Hacker Nelson & Co PC
New Hampton

Bryce Miller

Ernst & Young LLP
Des Moines

Maddie Miller

Ernst & Young LLP
Des Moines

Matthew Mullin

Ernst & Young LLP
Des Moines

Nate Nesler

Ernst & Young LLP
Des Moines

Ethan Orthaus

Hacker Nelson & Co PC
New Hampton

Rob Ovel

Farm Bureau Financial Services
West Des Moines

Mason Owen

Basepoint Tax & Accounting LLC
Cedar Rapids

Karen Pathmaprakashan

American Packaging Corporation
Story City

Sue Pulliam

Ernst & Young LLP
Des Moines

Ben Raveling

Hunzelman Putzier & Co PLC
Storm Lake

TikTik Rem

CliftonLarsonAllen LLP
Des Moines

Adam Severson

Ernst & Young LLP
Des Moines

Jay Sharma

Ernst & Young LLP
Des Moines

Max Sheridan

Ernst & Young LLP
Des Moines

Sam Shover

Ernst & Young LLP
Des Moines

Ganesh Singh

Ernst & Young LLP
Des Moines

Ashwin Sinha

Ernst & Young LLP
Des Moines

Lisa Smith

Myers and Stauffer LC
Des Moines

Theresa Smith

Ernst & Young LLP
Des Moines

Ashlyn Stallman

BakerStarrett LLP
Grinnell

Jack Stark

Ernst & Young LLP
Des Moines

Ethan Straight

Ernst & Young LLP
Des Moines

Giovanni Tenikat

Myers and Stauffer LC
Des Moines

Nguyen Tran

Ernst & Young LLP
Des Moines

Kathy Truong

Ernst & Young LLP
Des Moines

Spencer Van Waus

Myers and Stauffer LC
Des Moines

Everett Wegge

Hacker Nelson & Co PC
Decorah

Rebecca Wiederholt

Ernst & Young LLP
Des Moines

Vaibhav Yawale

Ernst & Young LLP
Des Moines

Noah Zetocha

Ernst & Young LLP
Des Moines

Will Zheng

Ernst & Young LLP
Des Moines

Timothy Jenson

De Noble Austin & Company PC
Rock Rapids

Christopher Williams

UHY LLP
West Des Moines

Kylie Winkler

Forvis Mazars LLP
West Des Moines

Student Members

Central College

Kale Downey

Coe College

Gio Besson
Shannon Linder

Des Moines Area Community College

Katherine Saunders

Drake University

Gabriella Perron

Iowa State University

Dawson Barthole
Preston Block
Brynn Bowman
Trevor Coyle
Jack Curtiss
Gaby Estabrook
Molly Fitzpatrick
Noah Frank

Brennan Frye
Preston Grosklags
Lexie Kvale
Andrew Lawrence
Cole Metz
Noah Miller
Gage Papich
Liam Salama
Daniel Sanabria
Colton Schroeder
Emma Wolff

Northwest Missouri State University

Alisha Cook

Simpson College

Nick Fehl

Southern New Hampshire University

Zach Burns

University of Iowa

Bryson Hope
Marin Jacobsen
Alizarin Purtle

University of Northern Iowa

Austin Anderson
Olivia Belger
Maya Cummins
Mikayla Dale
Faith Groeneweg
Bailey Hakert
Carter Homan
Megan Roling
Andrea Ruvalcaba
Blake Setser
Grant Wolford

Western Illinois University

Stephanie Latcham

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.

Becca Agnitsch, MHCS PC, West Des Moines, has been promoted to manager.

Kate Banwarth, Eide Bailly, Dubuque, has been promoted to manager.

Brianna Bautsch, Honkamp PC, Dubuque, has been promoted to senior assurance manager.

David Beck, RSM, has been promoted to senior manager.

Sarah Beckman, UHY LLP, West Des Moines, has been promoted to audit senior manager.

Erica Berning, Honkamp PC, Dubuque, has been promoted to accounting supervisor.

Justine Binkley, RSM, has been promoted to supervisor.

Katie Bonus has been hired by Principal Financial Group, Des Moines, as senior accounting analyst.

Ryan Boatman, Gilbert & Cook, has successfully completed the 2026 Greater Des Moines Leadership Institute program.

Courtney Brickner, RSM, has been promoted to managing director.

Haley Brockway, Honkamp PC, Dubuque, has been promoted to tax manager.

Phil Carpenter, TBB Advisors LLP, West Des Moines, has been named partner.

Clayton Colborn, RSM, has been promoted to supervisor.

Allen Cook has been hired by Goodman & Hayes CPAs PLLC, Ottumwa, as staff accountant.

Erica Craig, RSM, has been promoted to senior manager.

Alexi Culbertson has been hired by American Equity, Des Moines, as internal controls manager.

Jennifer Curtis has been hired by NCMIC Group, Clive, as controller.

Dylan Determan, Honkamp PC, Dubuque, has been promoted to assurance senior.

Meridyth Diamond, RSM, has been promoted to manager.

Brody Eaton, King Reinsch Prosser & Co LLP, Sioux City, has been promoted to senior accountant.

Kelly English, Honkamp PC, Dubuque, has been promoted to senior tax associate.

Jilliane Erlbacher has been hired by Security Benefit, Clive, as vice president of financial planning and analysis.

Continued on page 12

Maria Edwards, Erpelding Voigt & Co LLP, Algona, has been promoted to senior accountant.

Kaitlyn Fogarty, Honkamp PC, Dubuque, has been promoted to tax manager.

Nick Foster, RSM, has been promoted to supervisor.

Lauren Gregory, Honkamp PC, Waukee, has been promoted to senior accountant.

Freja Hager, RSM, has been promoted to supervisor.

Nicholas Haberl, RSM, has been promoted to manager.

Demi Halloran has been hired by Transamerica, Cedar Rapids, as senior tax accountant.

Devin Harker, Innovative Captive Strategies Inc, Waukee, has been promoted to finance manager.

William Hins, King Reinsch Prosser & Co LLP, Sioux City, has been promoted to senior accountant.

Magdalena Kozicka-Lopez, RSM, has been promoted to manager.

Morgan Kramoski, RSM, has been promoted to senior assurance associate.

Dylan Lange, Honkamp PC, Dubuque, has been promoted to accounting manager.

Aleda Lee, Honkamp PC, Dubuque, has been promoted to tax associate II.

Katie Lohnes, MHCS PC, West Des Moines, has been promoted to senior manager.

Nancy Manary, RSM, has been promoted to senior manager.

Lisa Mapes, Deloitte, has successfully completed the 2026 Greater Des Moines Leadership Institute program.

Ryan McCauley has been hired by TWC Services Inc, Des Moines, as director of finance.

Steph Noll, Honkamp PC, Dubuque, has been promoted to tax manager.

Erica Parks, CBE Companies, Cedar Falls, was inducted into the University of Northern Iowa Women of Business Hall of Fame.

Ryan Patchett, Lincoln Savings Bank, Reinbeck, has been promoted to controller.

Nicholas Passini, RSM, has been promoted to partner.

Kristi Patrum, Honkamp PC, Dubuque, has been promoted to senior accounting manager.

Reilly Quick, RSM, has been promoted to manager.

Michelle Rasmussen, Honkamp PC, Davenport, has been promoted to senior manager.

Nick Reiter, Eide Bailly, Dubuque, has been promoted to senior associate.

Hilary Rice, King Reinsch Prosser & Co LLP, Sioux City, has been promoted to senior accountant.

Mitch Schmitt, Honkamp PC, Dubuque, has been promoted to senior business application specialist.

Brian Sweeney, Drake University, has been promoted to associate professor of practice in accounting.

Jared Tigges, RSM, has been promoted to senior assurance associate.

Maddie VanderFeen has been hired by Farmers Mutual Hail Insurance, West Des Moines, as accountant III.

Breanna VanOosten, RSM, has been promoted to manager.

Luke Warner, Honkamp PC, Cedar Rapids, has been promoted to staff accountant II.

Sam Weber, Creative Planning LLC, Cedar Rapids, has been promoted to tax manager.

Katie Wilson, MHCS PC, Exira, has been promoted to senior.

Kirk Williams has been hired by Best Veterinary Solutions Inc, Ellsworth, as chief financial officer.

Anna Yung, MHCS PC, West Des Moines, has been promoted to manager.

Kelly Zadow, Erpelding Voigt & Co LLP, Algona, has been promoted to senior accountant.

Karla Zweifel, RSM, has been promoted to senior assurance associate.

MEET OUR ISCPA STAFF



JOSIE HOVE

POSITION: Student and Future CPAs Coordinator

ALMA MATER: Iowa State University

HOMETOWN: Roland

First job: I sold shoes at a Journeys.

What I wanted to be when I grew up: A dancer.

Tell us about your career history: Before joining ISCPA after graduation, I worked as a dance teacher, a barista, day-camp staff, and a few other fun jobs during college.

I am passionate about: Music! I spend most of my time listening to everything from hip hop to angst rock to K-pop to literally any genre. I just love music.

What attracted you to join ISCPA? The team! Everyone was so welcoming and fun to talk to from the moment I walked through the door.

If I weren't an association professional, you might find me working as...: A tour dancer. I think it would be fun to travel while dancing.

My favorite thing about my ISCPA role so far: The people! It has been so fun getting to know the members and meeting students all over the state.

I never leave home without: My phone, air pods, and my emotional support water bottle.

Favorite food: Ramen! I like almost every kind, but my favorite is tonkotsu ramen.

Favorite app: Spotify, for sure.

When I have free time: Reading, listening to music, dancing, playing Fortnite, and creating things.

Last book I read: Meditations

Favorite movie: I'm not a big movie person, but I've seen every episode of One Piece.

Favorite vacation spot: I always enjoy my trips to Chicago. The live music, river walks, and museums are always fun!

Favorite quote: "To yield without conviction is no compliment to the understanding of either."
- from Jane Austen's Pride and Prejudice.

Favorite band or musician: Impossible to answer...right now, I'd say BTS, Halsey, or Tame Impala.

Best concert you've been to and where: As of now, Halsey at the Armory last November. But I'm seeing BTS and Harry Styles this year and I think one of them will become my new favorite.

Three words that describe me best: Loud, outgoing, creative.

Place I'd love to live: Somewhere like Busan or Seoul where people operate on more of a night owl schedule. I'm not naturally a morning person.

Go-to Karaoke song: Anything Britney Spears

Person I'd like to exchange roles with for a day: Molly Long

Fictional family I'd like to be a member of: The Weasleys from Harry Potter

If I were famous, I'd want to be famous for: A dance piece that I made

My first guest if I hosted a talk show: Timbaland, he's a genius and I think it'd be interesting to hear him talk about his creative process.

Josie lives in Nevada with her two cats, Ivy and Tobi, and dog, Ahsoka.

2026 ISCPA Leadership Summit featured leaders in motion

More than 100 ISCPA leaders, volunteers, champions of the profession and dedicated members came together on May 7 for the 2026 ISCPA Leadership Summit and Annual Meeting. We elected our board of directors and celebrated two great leaders making a difference for ISCPA and the profession. We will have more on our newly elected leaders and award winners in next month's Iowa CPA.

ISCPA CEO Carrie Steffen led the group through a two-minute drill to provide committee highlights including a very creative and entertaining opportunity for members to share a song title that best describes the committee. Transitioning to her keynote presentation, Carrie focused on the Human Side of Leading Change where everyone, no matter their title or role, could learn to lead and model behavior for others.

After some networking time, Jenny McGarry, Associate Professor, University of Dubuque and current ISCPA board director led an interactive workshop focused on Courage in Motion: Experiencing the Human Side of Leadership – complete with some dance moves for willing participants.

Finally, the coveted Golden Calculator trophy was awarded to the ISCPA committee with the highest attendance at the event (based on percentage of total committee members). The Nonprofit Organizations Committee earned this year's bragging rights.

Mark your calendar now for May 6, 2027 to catch the action and the energy of the next ISCPA Leadership Summit.



May 28 Financial Institutions Conference: *where banking meets expertise*

The ISCPA Financial Institutions Conference brings together CPAs and industry professionals dedicated to the banking and financial services sector for a timely and insightful learning experience. This premier event explores the key developments, emerging trends, and critical issues impacting financial institutions today and into the future.

Hear from respected industry leaders and subject matter experts as they discuss topics ranging from regulatory and compliance updates to AI and technology advancements and evolving market conditions. In addition to gaining practical insights, attendees will have the opportunity to connect with peers, exchange ideas, and build valuable professional relationships.

Carefully developed by industry professionals, the conference agenda is designed to deliver relevant, meaningful content focused on the issues that matter most to those serving the financial institutions industry. Learn more at www.iacpa.org/fic

**FINANCIAL
INSTITUTIONS
CONFERENCE**

MAY 28
8 a.m. - 4:35 p.m. | 8 hrs CPE
WEST DES MOINES MARRIOTT

iscpa
IOWA SOCIETY OF CPAs

2026 Conferences and Signature Events at a Glance

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 Gala
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)
DEC. 14	Excel Mastery Conference



June Free CPE Series opportunity

Keep Your Best Leaders: Four Keys to Build a Flourishing Leadership Pipeline

June 10 | 9-10 a.m. CT | Live virtual webcast

Could your organization afford to lose its strongest leaders? Today's workforce trends suggest many organizations are at greater risk than they realize. According to a recent Gallup study, managers are more likely than non-managers to feel disengaged, burned out, and actively searching for new opportunities. In fact, more than half indicated they were either looking for or pursuing another job.

Retaining top leadership talent has never been more critical. Led by leadership coach and consultant Jon Lokhorst, this program explores four essential strategies to help organizations keep their best leaders: Identify Them, Engage Them, Develop Them, and Empower Them. Gain practical tools and ideas to strengthen leader retention efforts and build a thriving internal leadership pipeline for the future.



CPA IMPACT

ISCPA
IOWA SOCIETY OF CPAs

Leadership Academy
2026 - 2027



Looking for more opportunities to build your younger leaders? CPA Impact Leadership Academy is your answer!

Elevate your expertise at a June signature conference

Technology Conference

June 8-9 | Live Virtual Conference

Get ready for a tech-fueled adventure at the 2026 Technology Conference! The nationally recognized speakers from K2 Enterprises will equip you with practical solutions to real-world technology issues faced by accounting, financial and other business professionals. Dive into a wealth of actionable insights with cutting-edge strategies ensuring you're not just keeping up but surging ahead in today's dynamic tech realm. Find more details at www.iacpa.org/tc.

Technology for Nonprofit & Mission-Driven Organizations Conference

June 15 | Live virtual conference

This specialized conference brings together practical AI applications, automation strategies, donor engagement systems, and nonprofit-specific software solutions designed to help your organization run more efficiently without losing sight of what matters most - your mission. Find more details at www.iacpa.org/nfpotech

Taxation on Real Estate Conference

June 17 | Live virtual conference

The Taxation on Real Estate Conference brings together industry experts to explore the latest developments in real estate taxation, compliance and planning. Gain valuable insights and practical strategies to navigate the ever-changing market. Find more details at www.iacpa.org/realtax

Insurance Industry Conference

June 18 | Meadows Events & Conference Center, Altoona and live webcast

Discover fresh trends and top-notch practices shaping the insurance sector. Whether you're a seasoned pro or new to the field, this conference promises to arm you with valuable insights and expertise to level up your understanding of the insurance world. Find more details at www.iacpa.org/iic

Artificial Intelligence Conference

June 22 | Live virtual conference

Artificial Intelligence (AI) has rapidly taken center stage in the tech world - few innovations have captured more attention. Yet for many accounting and finance professionals, tapping into AI's full potential remains a challenge. This conference bridges the gap, exploring how AI can drive productivity gains, streamline workflows, and open the door to smarter, faster decision-making in your day-to-day work. Find more details at www.iacpa.org/aiconf

Popular multistate tax learning opportunity returns in June

If you work in multistate tax, mark your calendar - this one's for you. This unique virtual seminar returns in June, bringing together CPAs from across the Midwest for a deep dive into the latest regional tax developments.

Hosted in partnership with six Midwest state CPA societies, this event features seasoned tax experts from Iowa, Illinois, Indiana, Minnesota, Nebraska, North Dakota and Wisconsin. Gain practical insights into each state's evolving tax landscape, all in one convenient session.

Whether you're advising clients across state lines or handling multistate tax compliance, this seminar provides the focused insights you need to stay on top of the latest developments.

MULTISTATE TAX TRENDS: INTERSTATE INSIGHTS AND REGIONAL TAX PERSPECTIVES

June 25 | 8:30 a.m.-noon CDT | 4 hours CPE | Live virtual seminar

Find more details at www.iacpa.org/mstu

News and features moving to website



As part of our efforts to deliver more timely and accessible content, we are sunsetting the traditional monthly Iowa CPA newsletter after the June issue. Going forward, news, updates, and feature articles will be published individually on our website as they become available, allowing members to access information more quickly and easily. Watch for monthly email summaries with links to content and visit the ISCPA website often for the latest information.

Grow your nest egg, not your tax bill.



Qualified intermediary services for all types of Section 1031 exchanges



800-805-1031 • 515-224-5259

2900 Jordan Grove
West Des Moines IA 50265

iowaequityexchange.com



Ken Tharp



INTEGRITY. PRECISION. SECURITY.

TECHNOLOGY CONFERENCE

June 8- 9 | Live Virtual Conference

ISCPA
IOWA SOCIETY OF CPAs

Register today at www.iacpa.org/tc

Technology is evolving faster than ever and staying current is essential for today's accounting and finance professionals. Join the experts from K2 Enterprises at the 2026 Technology Conference for two days of practical insights, innovative tools, and strategies designed to help you thrive in an increasingly digital world. This virtual event delivers real-world applications and productivity-focused learning tailored specifically for professionals in accounting, finance, and business.

Featuring more than 18 sessions, the conference covers timely topics including AI, cybersecurity, Excel, QuickBooks, productivity tools, automation, workflows and more. Whether you're looking to sharpen your technical skills, improve efficiency, or better support clients and your organization, this conference offers valuable takeaways for every level of professional.