



IowaCPA

May 2025

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

CPA LICENSURE BILL SIGNED BY GOVERNOR

Iowa has a new CPA licensure pathway, backed by ISCPA and signed into law by Gov. Reynolds, expanding access while preserving professional standards. The law, effective July 2026, aims to ease entry into the profession and enhance interstate practice mobility.

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



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Celebrate the achievements of outstanding CPAs, scholarship recipients, and Iowa's newest licensees at this premier recognition event.

ISSUE NO. 2025-05

Published 10 times per year by the Iowa Society of Certified Public Accountants (ISCPA).

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Cover photo by Austin Johnson: Urbandale, Iowa

NEW! Leaders Emerging in Accounting Program

ISCPA is proud to launch our new **Leaders Emerging in Accounting Program** as we kick off the new membership year!

Join us Thursday, June 5, from 3-4 p.m. (in person or virtually) for the debut session: From Technician to Strategic Advisor. This dynamic workshop is built for early-career CPAs ready to grow beyond the task list and step confidently into strategic roles.

Build confidence, elevate your communication, and contribute more strategically to your team. You'll walk away with practical tools to shift your mindset, communicate financial insights, build influence, stand out in your organization and make decisions that drive results - no matter your job title.

- Practical tools, real-world examples, actionable habits.
- Presented by ISCPA member Joe Haley, CPA, director at Casey's General Stores.
- 1 hour of CPE | Ideal for CPAs with 0-5 years of experience, CPA exam candidates, or student members.

FROM TECHNICIAN TO STRATEGIC ADVISOR

June 5 | 3-4 p.m. CST

Sign up at www.iacpa.org/ftsa.

Summer conference for college educators

Attention educators! You don't want to miss this opportunity. The Iowa Society of CPAs, in partnership with the Illinois CPA Society, is hosting an Educators Conference this summer.

It's a free, half-day event designed for college accounting educators who want to stay ahead of the curve. You'll get timely updates, practical ideas to boost student engagement, and fresh perspectives on navigating the changing CPA landscape. Plus, it's a great chance to connect and share ideas with your peers.

Please help us spread the word to other college educators.

EDUCATORS CONFERENCE

July 23 | 9 a.m.-1:30 p.m. CST

Virtual event | CPE available

Register at www.iacpa.org/educatorsconference

A message from your board

The ISCPA board of directors met April 25, 2025. Decisions and activities are listed below.

- Approved consent agenda items including minutes of the Dec. 6, 2025 meeting of the board and the March 6, 2025 meeting of the executive committee.
- Received a written report updating state legislative activity from Brad Epperly, ISCPA's legislative counsel.
- Received information and discussed fiduciary responsibilities for directors with Eric Tubbs, Nyemaster Goode PC.
- Approved the 2025-26 budget.
- Discussed and approved 401(k) discretionary contribution.
- Discussed and approved ISCPA investment policy updates.
- Received an update on ISCPA building lease renewal.
- Received a report from Chair Erik Bonstrom including information on the new CEO starting in May.
- Vice Chair Rick Tiwald thanked Erik Bonstrom for his leadership as chair.
- Recognized outgoing board members.
- Scheduled a meeting for Sept. 26, 2025.

CPA licensure bill signed by governor

The ISCPA-backed legislation expanding CPA licensure pathways proposed during this legislative session and passed by unanimous vote in both chambers was signed by Gov. Reynolds on May 1. The bill, HF 778, introduces an additional pathway to licensure in Iowa by enabling future CPA candidates to become licensed upon earning a bachelor's degree with required accounting coursework, two years of accounting work experience, and passing the CPA Exam. The law will take effect July 1, 2026, allowing educational institutions and accounting firms a year to prepare students and staff for the new licensing pathway option.

The bill also addresses practice mobility by allowing licensed CPAs in good standing from outside the state to operate in Iowa, thereby removing state-based substantial equivalency requirements and improving Iowa's interstate mobility law by shifting to individual-based practice privilege.

The two existing pathways to licensure in Iowa also remain as options for aspiring CPAs: a bachelor's degree plus master's degree in accounting and one year of accounting work experience with CPA Exam, or a bachelor's degree with required accounting coursework plus 30 additional credit hours and one year of accounting work experience with CPA Exam.

"This legislation reflects a forward-thinking approach to licensure that preserves the integrity of the CPA while opening the door to more aspiring professionals," said ISCPA Interim CEO Ardis Kelley.



OPTION 1	Bachelor's degree	Bachelor's degree	1 year experience	CPA Exam
OPTION 2	Bachelor's degree	Up to 30 credits	1 year experience	CPA Exam
NEW OPTION 3	Bachelor's degree		2 year experience	CPA Exam

*All options lead to CPA licensure eligibility.

The additional pathway helps to remove barriers to entering the profession such as the time and cost of an extra 30 college credits while ensuring the "Four E's" (Education, Exam, Experience and Ethics) remain essential components to the CPA designation. Attracting more to the profession is critical in the face of decreasing new licensees combined with increasing CPA retirements. The public relies on CPAs to protect their financial interests in businesses, government, charitable organizations and more.

AICPA and NASBA have recently approved changes to the Uniform Accountancy Act (UAA) which enables states to adopt a third licensure pathway and shifts to an individual-based mobility model.

HISTORY

ISCPA's decision to propose new licensing legislation came about after members shared their ideas and experiences surrounding the current licensing requirements.

Continued on page 9
www.iacpa.org

2025 ISCPA Leadership Summit exceeds expectations

More than 100 ISCPA leaders, volunteers, champions of the profession and dedicated members came together for our first Leadership Summit. We elected our board of directors and celebrated two great leaders making a difference for ISCPA and the profession.



Suzanna de Baca, CEO of Story Board Advisors provided excellent insights into what it takes to be a future-ready leader during her keynote presentation. Here's a hint: empathy, trust and resiliency are all critical attributes of a leader.



Congratulations to Jenna Siberz, audit managing director with KPMG LLP in Des Moines for recognition as our Outstanding Committee Chair, and to Jeff Burnison, senior director for North America strategy, key projects and global commercial systems with Corteva Agriscience in Johnston for being honored with ISCPA's Distinguished Service Award.



Jenny McGarry, owner of JL McGarry Consulting in DeWitt and Monica Steckel, managing director at EY in Des Moines led an energizing workshop that had ISCPA committee members fully engaged. From ISCPA trivia to an escape-room challenge, members practiced their leadership styles and shared ideas for the future of their committees and resource groups.



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 Financial Institutions Committee earned this year's bragging rights.



The bar is set high for subsequent Leadership Summit events. Mark your calendar now for **May 7, 2026** to catch the action and the energy.



Make the most of your ISCPA membership

Join an ISCPA committee or resource group

There's never been a more exciting time to get involved with the Iowa Society of CPAs and we invite you to take the next step by joining one of our member volunteer committees or resource groups. Whether you're passionate about advocacy, interested in developing the next generation of CPAs, or eager to share your technical expertise, there's a committee or group where your voice can make a meaningful impact.

ISCPA committees and resource groups are where ideas are sparked, connections are made, and progress happens. You'll collaborate with peers across the state who share your commitment to strengthening the profession. Plus, it's a great way to expand your network, build your leadership skills, and stay informed about issues shaping the accounting landscape in Iowa and beyond. Nearly all meetings are offered virtually, so don't let geographical location hold you back.

Not sure where to start? No problem! The ISCPA team is happy to help you find a committee or resource group that aligns with your interests and availability. Some committees and groups meet in person, others virtually, and most offer a hybrid format. All are focused on providing real value to members while advancing the Society's mission.

Check out our committee and resource group list at www.iacpa.org/committees. We'd love to have you at the table.

Business & Industry Committee

The Business & Industry Committee brings together members working in accounting and finance roles across the private sector to exchange ideas, share expertise, and stay informed on emerging issues. This committee meets 2-3 times a year and serves as a forum for open dialogue with key stakeholders, shape the content and focus of ISCPA's annual Business & Industry Conference.



Career Awareness Committee

To increase the number and quality of entrants into the accounting profession, the Career Awareness Committee promotes, encourages, and educates students and influencers about the CPA profession. This includes planning events for high school, such as the annual Accounting Opportunities Experience presentations and spring High School Case Competition. In addition, the committee reaches college students through campus visits and CPA panels. This committee meets 10 times a year, with hybrid participation available.

Financial Institutions Committee

ISCPA's Financial Institutions Committee is composed of members working in or with financial

institutions. The committee serves as a resource for members serving or employed in the financial services arena and plans the annual Financial Institutions Conference. Committee members attend 2-3 meetings per year in addition to attending the conference.



Governmental Auditing and Accounting Committee

The Governmental Auditing and Accounting Committee brings together members who work in or with governmental entities or have an interest in governmental accounting. The committee promotes excellence in auditing and accounting for government units and collaborates with regulatory bodies such as the Iowa Auditor of State and the Iowa Department of Revenue. Members help plan the virtual Iowa Governmental Roundtable, monitor changes to federal and state requirements, and provide input on educational opportunities for ISCPA members. The committee meets 2-3 times a year, in addition to attending the Roundtable.

Insurance Industry Committee

The Insurance Industry Committee is tailored for accounting and finance professionals working in or

with the insurance sector, offering a space to share ideas and explore industry-specific challenges. Committee members help shape the annual Insurance Industry Conference held each June and meet 2-3 times a year in addition to attending the conference. If you're in the insurance space, this is a great way to stay plugged in and make your voice heard.

Iowa CPA Education Foundation Advisory Committee

This committee promotes the Iowa CPA Education Foundation by selecting scholarship recipients and advocating for this meaningful endeavor that supports the next generation of CPAs. The estimated time commitment is 3-6 hours, which includes reviewing and scoring scholarship applications, working on efforts to increase awareness of the foundation, and attending 1-2 meetings per year.



Iowa CPAs Month of Service Committee

The Iowa CPAs Month of Service Committee is responsible for planning the annual Iowa CPAs Month of Service event held in September. Committee members should evaluate how the event can best promote Iowa CPAs as local community advocates and provide value to members and their employers. Also, provide input on volunteer opportunities, promotion, and participation; and participate in the event through individual or team projects with co-workers or other CPAs. The committee is also responsible for reviewing criteria and selecting Iowa CPA Month of Service Award recipients. This committee meets 2-3 times per year.



Legislation Committee

The Legislation Committee plays a key role in shaping and promoting ISCPA's legislative priorities. Committee work includes developing the Society's legislative agenda, monitoring legislation during the Iowa legislative session, and keeping members

informed. Members also build relationships with policymakers, support grassroots advocacy efforts, attend CPA Day at the Capitol, and promote the Iowa CPA PAC, including helping distribute contributions to legislative candidates. The committee meets once a year, typically in August.

Mid-Career Professionals Resource Group

The ISCPA Mid-Career Professionals Resource Group is designed for CPAs who are navigating the middle stages of their careers, often balancing growing leadership roles, evolving professional goals, and increased responsibilities at work and at home. This group offers a space to discuss career advancement, skill development, leadership challenges, and work-life integration. It's an opportunity to connect with peers facing similar transitions, share strategies, and gain insights to support continued growth and success in the profession. The resource group meets 3-4 times a year.

Nonprofit Organizations Committee

The Nonprofit Organizations Committee is made up of members serving or employed in nonprofit organizations. This committee analyzes and recommends educational opportunities in not-for-profit accounting, auditing, governance, compliance and taxation, including planning and participating in the annual Nonprofit Virtual Series. This committee meets 2-3 times a year.

Taxation Committee

The Taxation Committee helps ISCPA members stay up to date on key tax law changes and provides technical guidance on complex issues. Committee projects include contributing to tax-related content for ISCPA members, engaging with agencies like the Iowa Department of Revenue and the IRS, reviewing proposed administrative rule changes, and monitoring tax legislation at both the state and federal levels. Members also support ISCPA advocacy efforts, including Iowa CPA Day at the Capitol and input on tax appeals processes. The committee meets monthly from May through August (with hybrid option), and time commitments vary based on the legislative and regulatory landscape.

Working Parents Resource Group

The ISCPA Working Parents Resource Group offers a space for members to connect, share resources, and discuss the realities of balancing a career and family life. Designed for professionals at all stages of parenting, the group explores topics like time management, workplace flexibility, and navigating career growth while raising children. It's a chance to exchange ideas, offer support, and build community with others who understand the unique challenges working parents face. The resource group meets virtually 5-6 times each year.

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cpas

Thanks to member feedback in late 2023, the ISCPA Pathways to CPA Licensure Task Force recommended, and the Board of Directors approved, that ISCPA support alternative pathways to CPA licensure that preserve a path to mobility.

At the 2024 Iowa CPA Day at the Capitol in January, members began talking with legislators about the CPA pipeline challenges and other states' legislative activities. The year saw other state CPA Societies also lay the groundwork for expanding pathways to licensure. By late 2024, ISCPA's board voted to introduce draft legislation for an additional pathway to licensure in Iowa. In February, two bills were introduced, one in the House and one in the Senate. With unanimous support, the bills were eventually merged and passed by both chambers.

Pathways task force member and ISCPA Secretary Twyla Rosenbaum attended the bill signing and said, "The signing of this legislation is the culmination of years of research and work from members of the ISCPA pathways task force and board of directors, and we look forward to this alternate pathway leading to future Iowa CPAs. It's a great day to be a CPA in Iowa!"

Attending the bill signing with Gov. Reynolds were ISCPA leaders and members Joel Anderson, Joanna Guhl, Jim Smith, Erik Bonstrom, Laura Meier, Elizabeth Rider, Emily Junker, Ardis Kelley, David Wall, Twyla Rosenbaum, Rachel Wollschlager, Erica Davis and Tyler Overmohle as well as ISCPA's legislative counsel Brad Epperly.

Renew your membership now

To take full advantage of all that your ISCPA membership offers, be sure you renew right away. May is the first month of the new membership year, and you won't want to miss the upcoming June session in our FREE CPE series only available to members. The total value of this FREE CPE series benefit alone is more than your annual membership dues! Look for your renewal statement in your inbox, mail, or visit **www.iacpa.org/renew**.

MORE BENEFITS WITH MEMBERSHIP

Career Center - Get acquainted with our new, upgraded ISCPA Career Center on our **website**. Replacing our previous job posting page, the Career Center provides members with invaluable resources to seek out accounting professionals and engage with highly qualified candidates or find your next career adventure!

Insurance - Protect what matters most. EXCLUSIVE INSURANCE DISCOUNTS FOR ISCPA MEMBERS COMING SOON! As an ISCPA member, you will soon have access to exclusive discounts on a variety of insurance products designed to protect you, your career, and your business.

College savings - ISCPA members qualify for Upper Iowa University's Gold Grant thanks to our partnership. Members, members' spouses and children are eligible. Learn more about this opportunity at **UIU.EDU/ISCPA**.

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. This easy access tool allows ISCPA members to conveniently connect.

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 from other courses you've taken, and it's 100% free for you.

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.

Make connections - Being engaged with your state society can lead to opportunities you've never thought possible. Attend an in-person conference, sign up for an upcoming Community Connections gathering near you, or connect with others through discussions on ISCPA Link.

Invest in yourself, your state society and your profession by renewing your membership in May. Thank you for your continued support of ISCPA. The membership renewal covers May 1 to April 30, 2026.



**Strengthen our voice and contribute at
www.iacpa.org/advocacy**

Best practices for maximizing AI - seamlessly integrating AI into your business operations

By Thomas G. Stephens, Jr., CPA, CITP, CGMA



AI has emerged as a transformative force in an era of rapid technological advancements. Considering the best practices for maximizing AI, the potential to revolutionize how we conduct business operations is astounding. As you delve into AI, you will discover how to align this technology with your core objectives and tackle challenges. Let's dive into the strategies that will help you unlock the full potential of AI.

Setting clear AI objectives for business success

Identify clear objectives that resonate with your core business goals to make the most of AI. This approach ensures that your AI initiatives are purposeful and lead to tangible benefits, such as improved efficiency or enhanced customer satisfaction. By defining these objectives, you create a strategic roadmap that helps avoid costly misalignments and missed opportunities. Additionally, these objectives should address ethical and regulatory challenges and build stakeholder trust. This alignment is critical to driving innovation and growth.

Safeguarding data privacy in the AI era

Data privacy and security should be at the forefront as you

integrate AI. Mismanagement of sensitive data can lead to compliance risks and erode customer trust. Many of the population are concerned about AI's impact on data privacy, underscoring the need for transparency and accountability. Implementing robust data protection measures and adhering to privacy regulations like the General Data Protection Regulation can help safeguard personal data and maintain trust.

Navigating upfront costs

Integrating AI involves upfront hardware, software, data preparation, and ongoing maintenance costs. However, these investments can lead to substantial long-term savings and an impressive return on investment. AI systems can enhance accuracy, speed, and decision-making, ultimately boosting operational efficiency. You can optimize cost management and maximize AI's benefits.

Advancing AI expertise through an online degree

An online degree can deepen your understanding of AI technologies while offering a flexible learning schedule. Earning an online degree allows business owners to gain valuable skills and knowledge while

managing their operations flexibly. Pursuing a degree in computer science not only covers AI but also builds a foundation in IT, programming, and computer science theory—start by comparing online computer science degree options.

Empowering your team with tailored AI training

You must equip your team with the right skills to fully leverage AI. Developing a comprehensive AI training program tailored to various roles ensures that employees can effectively deploy and utilize innovative technologies. Customizing training balances theoretical understanding and practical application, empowering your workforce to harness AI advancements, improve productivity, and innovate business strategies.

Revolutionizing customer interaction with chatbots

AI-driven chatbots can revolutionize your customer service by enhancing efficiency and personalization. These bots, equipped with natural language processing and real-time response capabilities, engage customers across multiple channels, addressing inquiries promptly. By managing repetitive tasks, chatbots free up human agents for more complex issues, ultimately boosting customer satisfaction and loyalty. Although human oversight is necessary, chatbots offer a cost-effective way to enhance customer interactions.

Steering through AI regulatory waters

When integrating AI solutions, understanding and complying with regional regulations and data protection laws is essential.

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– Cantor Forensic Accounting, PLLC

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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.

Hannah Dash

CliftonLarsonAllen LLP
Cedar Rapids

Austin Eckenrod

RSM US LLP
Des Moines

Katie Hatlie

RSM US LLP
Des Moines

Lindsey Gaunitz

Honkamp PC
Dubuque

Matt Kalof

Meriweather Wilson and
Company PLLC
West Des Moines

Dahlia Le Roy

Legacy Financial Group
Tax and Accounting
Des Moines

Levi Luko

Tarbell & Co PLC
West Des Moines

Kayla McCormick

RSM US LLP
Des Moines

Nathan Ryan

RSM US LLP
Des Moines

Alexa Stripe

The Mutual Group
West Des Moines

Ami Taylor

Tailored Tax &
Accounting
Iowa City

Jayde Vondrak

Tarbell & Co PLC
West Des Moines

AFFILIATES**Chris Burrows**

Nevada

Maia Harvey

Hacker Nelson & Co PC
Dubuque

Blake Henriquez

Hacker Nelson & Co PC
Decorah

Laura McGee

Hacker Nelson & Co PC
Decorah

Ava Mess

Eide Bailly LLP
Dubuque

Timothy Miller

Dubuque

NON-RESIDENT**Brittney Berhorst**

Erpelding Voigt & Co
LLP
Canton, Mo.

Shaun Stoker

KPMG
Olathe, Kan.

New student affiliates

Buena Vista University

Erica Amigon
William Munger
Laurie Van Schouwen

Central College

Colton Comstock
Andrew Cotty
TJ DiSessa

Coe College

Maddy Maahs

**Des Moines Area
Community College**

Maya Anderson

Dordt University

Addie DeJong
Lauren Regnerus

Drake University

Bethany Erkel
John Lee
Colton Owens

**Iowa Lakes Community
College**

Macy Schneider

Iowa State University

Kaitlyn Ault
Olivia Knudtson
Anna Rader
Emery Rinderknecht

**Maharishi International
University**

Suresh Kathayat

**Northwestern Missouri
State University**

Regan McClure

**Southern New
Hampshire University**

Ciane Smith

University of Iowa

Zachary Johnson
Benedict Karuru

**University of Northern
Alabama**

Nicholas Jose Tenuto

**University of Northern
Iowa**

Elise Andersen
Julia Anderson
Ryan Augustine
Dylan Boone
Aaron Brost
Emily Erdelt
Isabel Erzen
Sam Gourley

Josiah Laddusaw
Kate Lappe
Reese Monson
Kailey Novak
Jamison Stutzman
Will Swift
Baylor Van Sickle
Cecilia Venenga
Chloe Yearian

**University of Notre
Dame**

Allison Narmi

Upper Iowa University

Tyler Bailey
Diogo Cardoso
Kemper Cline
Logan Cockerham
Sage Stellmacher

**FIND A
CPA**

Join the Find a CPA Directory at www.iacpa.org/find-a-cpa

Members in the news

Matthew Adams, UHY LLP, West Des Moines, has been promoted to tax manager.

Joseph Adducci has been hired by Seneca Tank, Des Moines, as CFO.

Tabetha Albrecht, UHY LLP, West Des Moines, has been promoted to CAS accounting manager.

Anoud El Anani has been hired by Principal Financial Group, Des Moines, as technology manager, internal audit.

Paul Archer, Gardiner + Company PC, Albert City, has been promoted to audit manager.

Chris Axiotis, Wellabe Inc, Des Moines, has been promoted to vice president of risk management.

Brant Barnhart has been hired by Farm Bureau Financial Services, West Des Moines, as senior assurance associate.

Courtney Berg has been hired by St Ambrose University, Davenport, as CFO.

Claire Bozman has been hired by Principal Financial Group, Des Moines, as senior accounting analyst.

Rachel Burds has been hired by Wolfe Eye Clinic, West Des Moines, as CFO.

Madeline Clemens has been hired by ARAG Legal Insurance, Des Moines, as tax manager.

Kristin Glick, Welgaard CPAs and Advisors, Urbandale, has been promoted to staff accountant.

Carly Haden, Cain Ellsworth & Co LLP, Sheldon, has been promoted to supervisor.

Scott Hartema has been hired by Bankers Trust, Des Moines, as CFO.

Kelsey Hilgenberg has been hired by American Equity Investment, Des Moines, as internal controls manager.

Matt Hickman has been hired by Athene USA, West Des Moines, as manager of internal audit and SOX.

Bradon Hines has been hired by IRG Inc, West Des Moines, as CFO.

Shannon Hunter, Honkamp PC, Dubuque, has been named chief financial officer.

Amy Kircher, Fidelity & Guaranty Life, Des Moines, has been promoted to lead internal auditor.

Scott Kruger, Cain Ellsworth & Co LLP, Sheldon, has been promoted to supervisor.

Kaylee Kruschwitz has been hired by Sammons Financial Group, West Des Moines, as senior accountant - accounting policy.

Brianna Nelson has been hired by Medical Associates Clinic PC, Dubuque, as accountant.

Ryan Peterson has been hired by Continental Western Group, Urbandale, as director of finance.

Riley Plummer has been hired by Sammons Financial Group, West Des Moines, as corporate accounting analyst 2 - financial planning and analysis.

Kristin Quinones, Eide Bailly LLP, Dubuque, has been promoted to senior associate, audit.

Katie Roth has been hired by Iowa Soybean Association, Ankeny, as senior accountant.

Abby Schreck, TP Anderson Company PC, Humboldt, has been named shareholder.

Brian Schult, F&G Life, Des Moines, has been promoted to VP, finance enablement.

Joe Splinter, Eide Bailly LLP, Dubuque, has been named Dubuque Market Leader.

Eddie Weible has been hired by Principal Financial Group, Des Moines, as accountant.

The following members have been added to the 2025 Forbes Best in State CPAs List:

Barry Anderson, Anderson Lower Whitlow PC, Bettendorf

Brian Becker, RSM US LLP, Cedar Rapids

Erik Bonstrom, UHY LLP, West Des Moines

Steve Bruner, Denman & Company LLP, West Des Moines

Gregory Burbach, Honkamp PC, Dubuque

Holly Cushman, Honkamp PC, Dubuque

Jodi Kerr, TDT CPAs and Advisors PC, Fairfield

Amie Kuntz, RubinBrown LLP, Clive

Chris Overturf, LattaHarris LLP, Cedar Rapids

Ebony Rahe, Williams & Company PC, Spencer

Jessica Richter, Forvis Mazars LLP, West Des Moines

Dan Schwarz, MHCS PC, West Des Moines

Chris Terhark, Deloitte & Touche LLP, Des Moines

Katie Thomas, Honkamp PC, Dubuque

Community Connections: Bringing Iowa CPAs together

*Face-to-face conversations that
shape the future of the profession.*



In a time when virtual meetings and inbox overload dominate our professional lives, there's something refreshing, almost revolutionary, about face-to-face conversation. The Iowa Society of CPAs has tapped into that need through its Community Connections series, a statewide effort to bring CPAs together for real, meaningful dialogue.

Held in a townhall-style format, Community Connections meetings take place in communities across Iowa twice a year, this year in June and again in the fall. These aren't lectures or formal presentations, they're interactive, come-as-you-are conversations designed to connect ISCPA members with Society leadership and with each other. New ISCPA CEO Carrie Steffen plans to attend as many as her schedule allows. Whether you're in public accounting, industry, education, or government, the goal is the same: listen, learn, and collaborate to strengthen the accounting profession in Iowa.

SUMMER COMMUNITY CONNECTIONS

JUNE 2 | Burlington 3-4:30 p.m.

JUNE 3 | West Des Moines 3-4:30 p.m.

JUNE 6 | Atlantic 2-3:30 p.m.

JUNE 9 | Sioux Center 3-4:30 p.m.

JUNE 11 | Clear Lake 2:30-4:00 p.m.

JUNE 19 | Fort Dodge 9:30-11 a.m.

JUNE 23 | Marion 3-4:30 p.m.

JUNE 25 | Cedar Falls 3:30-5 p.m.

A FORUM FOR REAL TALK

Community Connections gives members an open platform to share what's on their minds, whether it's concerns about licensing changes, challenges with recruitment and retention, or the evolving role of CPAs as strategic advisors. ISCPA staff and member leaders come prepared to provide updates on key issues, but they're also there to listen. It's not uncommon for ideas shared in these sessions to influence ISCPA's strategic direction or inspire new member initiatives.

"Last fall, I walked away from my area Community Connections meeting with a broader perspective,"

says ISCPA board of directors member Twyla Rosenbaum, a professor at Morningside University. "Hearing what's happening in other parts of the state reminds me we're part of something bigger."

"We're part of something bigger."

– Twyla Rosenbaum

STAYING INFORMED IN A CHANGING PROFESSION

One of the most valuable aspects of the Community Connections series is the opportunity to hear first-hand about legislative updates, regulatory shifts, and profession-wide developments. From the recent passing of a bill creating a third CPA licensure pathway to tax challenges facing many members, these sessions provide context and clarity you won't find in a newsletter.

Last fall, ISCPA staff fielded questions about the state's (now signed) 120-hour licensure option, offering details on implementation timelines and implications for firms. For many attendees, the discussion helped ease concerns and sparked important planning conversations back at the office.

NETWORKING WITHOUT NAME TAGS

Unlike traditional networking events, Community Connections meetings are intentionally casual. There's no podium, (usually) no PowerPoint, and no pressure. It's just a group of peers coming together over coffee to talk shop. That authenticity fosters genuine relationships and makes it easier for new members and young professionals to jump in.

YOUR VOICE, YOUR PROFESSION

Perhaps most importantly, these meetings reinforce the value of member input. ISCPA doesn't just serve its members, it serves because of its members. Community Connections is a direct line between the people doing the work and the organization advocating on their behalf.

If you've never attended a Community Connections event, now's the time. Whether you're looking to ask questions, offer feedback, or just connect with

fellow CPAs in your area, your presence matters.

For upcoming dates and locations, visit www.iacpa.org/ccsummer and get signed up. Let's build the future of the profession, together and in person. If you have questions or ideas, please contact Lindsey Haley, Director of Membership and Business Development at lhaley@iacpa.org or 515-985-7125.



My CPE Tracker Another great benefit of ISCPA membership. Access your CPE Dashboard at www.iacpa.org/my-cpe/tracker.



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Continued from page 10

The regulatory landscape is complex and varies across jurisdictions, affecting data security and AI deployment. Compliance may involve impact assessments, particularly in sensitive sectors like healthcare and finance. International efforts like the Bletchley Declaration emphasize ethical AI usage and encourage global standards. Proactively adapting to these regulations can protect your operations from legal liabilities and enhance your market reputation.

Summary

In the evolving digital landscape, harnessing the power of AI can be the key to unlocking new horizons for your business. The journey may present hurdles when applying best practices for maximizing AI, such as ensuring data security and navigating complex regulations. Still, these challenges are stepping stones to creating a future-ready enterprise. By embracing AI with purpose, clarity, and ethical foresight, you are not just adapting to change but actively setting a new standard in business excellence.

Tommy is a shareholder of K2 Enterprises. At K2, Tommy focuses on creating and delivering content and is responsible for many Firm management and marketing functions. You can reach him at tommy@k2e.com or learn more about K2 Enterprises at www.k2e.com.

To learn more about AI and other technology topics important to accounting, financial and other business professionals like you, attend the virtual Technology Conference on June 9-10. Get details at www.iacpa.org/TC.

TECHNOLOGY CONFERENCE

JUNE 9 8:00AM - JUNE 10 4:00PM CDT | 16 HRS CPE | LIVE VIRTUAL CONFERENCE

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Parting thoughts from...

Outgoing Chair Erik Bonstrom

Looking back on my time as chair of the Iowa Society of CPAs, a lot has been accomplished, but I'm also deeply aware of how far we still need to go. One of the most valuable lessons I learned during my tenure has been the power of collaboration. I have learned so much from working with other CPAs across our state to tackle the challenges affecting our profession.

Alternative path to CPA licensure legislation: a game-changer for the profession

A central focus of our efforts has been addressing the CPA pipeline. The shortage of qualified individuals entering the profession is a major concern, and finding new approaches to tackle this issue has been a top priority. One of our key initiatives has been advocating for legislative changes to reshape how future accountants enter the profession.

A major milestone in this effort has been our ongoing work on legislation to create an alternative pathway to CPA licensure in Iowa. For over 20 years, a barrier has existed that made it harder to attract individuals to the accounting profession. This barrier was in the form of educational requirements, which were often seen as a roadblock. The current model requires completing 150 semester hours, earning a bachelor's degree, passing the CPA exam, and obtaining one year of experience. That is about to change.

Our ISCPA-backed legislation passed the Iowa legislature and was signed by the governor on May 1. This is a game-changer. The bill offers an alternative pathway: completing 120 semester hours, earning a bachelor's degree, passing the CPA Exam, and obtaining two years of experience. This new model has been well-received and was met with overwhelming support when it passed through the legislature. Advocating for this legislation with a successful CPA Day at the Capital in January helped bring awareness to its importance. This is a monumental step forward and will help attract more

students to the accounting profession for years to come.

National Pipeline Advisory Group

In July 2024, the National Pipeline Advisory Group (NPAG) issued their report to help address the shortage of CPAs. NPAG is also requesting that CPAs sign a pipeline pledge. NPAG's recommendations are organized into six equally important themes:

- Make the academic experience more engaging
- Address the time and cost of education
- Grow support for CPA Exam candidates
- Prioritize strategies to expand access for underrepresented groups
- Enhance the employee experience by evolving business models and cultures
- Tell a more compelling story about accounting careers

Please consider how you can pledge to push these initiatives forward.

Advocating for STEM field recognition

Alongside our work on the CPA licensure legislation, we've also focused on advocating for accounting to be recognized as a science, technology, engineering, and mathematics (STEM) field. Accounting faces challenges in attracting new talent, partly because it does not receive the same level of funding as other STEM fields. Advocating for this shift, both locally and nationally, has been an ongoing effort. Two years ago, we lobbied for this cause in Washington, D.C. with the AICPA Council Meeting, and we plan to do so again in this year.

Leadership transition and the future ahead

On the organizational side, the search for a new CEO of the ISCPA is now complete. We are excited to welcome Carrie Steffen to lead the organization into the future. She brings more than 25 years of

experience in the accounting profession and passion for supporting CPAs. This is another step in ensuring we have the leadership needed to continue pushing forward on all the important issues we face.

Final thoughts

As I reflect on the past year, I am reminded of the incredible people I've met and worked with along the way. Collaborating with such passionate and driven individuals has made all the difference. Together, we have been able to tackle some of the toughest issues facing the profession, and we are well on our way to creating meaningful change.

I'd like to extend my heartfelt thanks to the ISCPA for the opportunity to serve. It has been an incredible honor to lead this organization, and I am proud of all that we have achieved together. I am excited to see what the future holds, and I look forward to continuing our work to strengthen and advance the accounting profession.

Erik Bonstrom is a CPA and partner at UHY LLP in West Des Moines. He has been a member since 2003.





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JUNE 18, 2025 | 7 AM - 4:20 PM | 8 HRS CPE | THE MEADOWS EVENTS & CONFERENCE CENTER, ALTOONA

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Harness the power of AI: a new learning series for CPAs

Introducing **AI Unboxed**, a new four-part series designed to help CPAs use artificial intelligence (AI) to improve business processes. Whether you're new to AI or looking to expand your knowledge, this series will provide practical strategies for integrating AI into your daily workflow.

Led by experts Tommy Stephens of K2 Enterprises and Jennifer Elder, founder of The Sustainable CFO, each session offers clear, actionable insights to help you apply AI in your work and increase efficiency.

Purchase the sessions individually or as a bundle for a discounted rate.

SESSION 1, MAY 22

Exploring the Power and Potential of AI

SESSION 2, MAY 29

Using AI and Excel

SESSION 3, JUNE 5

Financial Statement Analysis with AI

SESSION 4, JUNE 12

Using AI to Research and Report

Find more details at www.iacpa.org/25aiunboxed

Save the date for annual tax updates and signature programs

JUNE 16	Multistate Tax Issues: Interstate Insights and Regional Perspectives
AUG. 6	Farm Tax Update
OCT. 27	Accounting and Auditing Update for the Real World
OCT. 28	Preparation, Compilation and Review Update for the Local Firm
OCT. 30	Real World Tax Update for Individuals and Entities
NOV. 6	Federal Tax Update: Individual and Business C.urrent Developments
NOV. 13	Iowa Tax Update
NOV. 20-21	Fall Federal Tax Summit (Cedar Rapids)
DEC. 2	Iowa Department of Revenue Update
DEC. 8-9	Winter Federal Tax Summit

As potential future tax updates are released, ISCPA will be your go-to source for the latest news and developments. Visit our **online CPE catalog** often for the latest learning opportunities.

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MAY 20, 2025
8 AM - 4:25 PM | 8 HRS CPE
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MAY 20 FINANCIAL INSTITUTIONS CONFERENCE: WHERE BANKING MEETS EXPERTISE

The ISCPA Financial Institutions Conference is the premier event for CPAs and professionals who work in or with the banking industry. This conference offers an exclusive opportunity to dive deep into the latest trends, innovations and challenges shaping the future of banking and financial institutions.

Engage with industry leaders and experts as they share valuable insights on the most pressing issues affecting the sector today, from regulatory changes to emerging technologies and market shifts. Expand your knowledge and connect with like-minded professionals, exchange ideas and strengthen your network. The agenda is curated by industry professionals to provide deeper insights and focus on what matters most to you. For more details, visit www.iacpa.org/fic.

Level up your learning at a June conference

TECHNOLOGY CONFERENCE

June 9-10 | Live Virtual Conference

Nationally acclaimed experts from K2 Enterprises deliver powerful, practical solutions to the real-world tech challenges facing today's accounting, finance, and business professionals.

TAXATION ON REAL ESTATE CONFERENCE

June 17 | Live Virtual Conference

Join leading industry experts as they break down the latest developments in real estate taxation, compliance, and planning. Gain timely insights and practical strategies to navigate complex tax challenges with clarity and confidence.

INSURANCE INDUSTRY CONFERENCE

June 18 | Altoona and Live Webcast

Explore emerging trends and best practices transforming the insurance industry. Whether you're a seasoned professional or just getting started, you'll gain valuable insights and practical knowledge to elevate your impact in the field.

K2'S ARTIFICIAL INTELLIGENCE CONFERENCE

June 30 | 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.

Popular multistate tax learning opportunity returns in June

If you work in multistate tax, mark your calendar - this one's for you. After a strong debut last year, 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, Michigan, Minnesota, Nebraska, and North Dakota. 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 ISSUES: INTERSTATE INSIGHTS AND REGIONAL TAX PERSPECTIVES

June 16 | 8:30 a.m.-noon CDT | 4 hours CPE

Live virtual seminar

2025 Conferences at a Glance

MAY 20	Financial Institutions
JUNE 9-10	Technology
JUNE 18	Insurance Industry
AUG. 14	Emerging Leaders
AUG. 26	CPA Trends Forum
SEPT. 16-17	Fall CPE
SEPT. 25	Circle of Excellence Awards
NOV. 3	Business Valuation
DEC. 3	K2's Excel



Carrie Steffen to lead ISCPA

Carrie Steffen was recently named the Society's new CEO. She will assume her new position on May 19, taking over from member and Interim CEO Ardis Kelley who will continue to chair the ISCPA Pathways to CPA Licensure Task Force.

"We are very excited to announce Carrie as ISCPA's CEO," stated ISCPA Chair Erik Bonstrom. "She brings a wealth of experience serving CPAs as president of the Whetstone Group, Inc., is a nationally recognized speaker, and was the national marketing director for a large CPA firm. I know that members will benefit from Carrie's passion for supporting CPAs."

GETTING ACQUAINTED

As we welcome Carrie to the organization, it's a perfect time to learn more about her background, career path and her thoughts about leading the Society.

A native of Denver, Colo., she moved to Bloomfield, Ia. in middle school and graduated from Davis County High School. Carrie was a volleyball and track athlete at Simpson College where she was an eight-time conference champion and three-time All-American in track and was inducted into the Simpson College Athletic Hall of Fame.

Cedar Rapids is home for Carrie and her husband Brian, a PT and a Partner at Rock Valley Physical Therapy. They have two sons: one recently graduated from Coe College in Cedar Rapids, and the other is a sophomore at Iowa State University in Ames.

CAREER PATH

A marketing internship with RSM in Des Moines led to a full-time offer, and she eventually served as the national marketing director before establishing The Whetstone Group in 2000. As co-founder and president of the company, she has promoted the discipline of growth among firms of all sizes ranging from sole practitioners to the top national firms. She has not only influenced firm leaders, but also shaped thousands of professional staff, marketing resources and other industry consultants through her speaking and training efforts.

"I love the people of accounting and supporting them in their journey to be successful in whatever way they define it. Accountants are some of the smartest, most sincere, most generous professionals. I want them to value themselves and what they do for clients in equal measure," says Carrie.

Carrie has been named to the Association for Accounting Marketing Hall of Fame, Accounting Today's Top 100 Most Influential Consultant to Watch list and the Corridor Business Journal 40 Under 40 List. She is a member and past president of CPA Consultants' Alliance (CPACA) and has held various roles with the National Association for Accounting Marketing (AAM) including board member, treasurer, finance committee chair, and education committee chair. She's a frequent guest on industry leading podcasts including the Accounting Today podcast, AICPA's Small Firm Podcast and has been a featured guest on the AICPA's Town Hall.

"Accounting is the backbone of business and our economy. As a citizen, I absolutely want CPAs and other accounting professionals involved in making sure this important function is handled with integrity, vision and accuracy. If I can play a role in ensuring the well-being of the profession and its people, I'm honored to do that," adds Carrie.

INTERESTING FACTS ABOUT CARRIE

- I have a lot of hobbies including knitting, baking sourdough, bourbon tasting, reading, traveling, and experimenting in the kitchen.
- My husband grew up in Des Moines and graduated from Dowling. Yes, we know Caitlin Clark's parents. No, we can't get you Fever tickets.
- Last May, my husband and I hiked Rim to Rim of the Grand Canyon (26 miles). It took us about 11 hours, 9 hours of active hike time. It was one of the most awe-inspiring, bucket list experiences of my life.
- I absolutely love winter – skiing in particular. We have skied in Colorado, Arizona, and New Mexico and try to do a trip every year as a family. This year we are going skiing in the French Alps.
- I enjoy almost any kind of physical activity, but on the regular I run, bike, hike and play tennis and golf. Working out, in general, is a huge piece of my stress management routine.
- I've also recently started practicing meditation (see stress management routine above).
- I have two rescue dogs who have assumed the role of "kids" as our nest has emptied.

WANT TO MEET CARRIE IN PERSON?

She plans to attend these upcoming events in her first few weeks (subject to change):

MAY 20 | Financial Institutions Conference at West Des Moines Marriott

JUNE 2 | Community Connections* in Burlington

JUNE 3 | Community Connections in West Des Moines

JUNE 6 | Community Connections in Atlantic

* See more on Community Connections dates on page 14.

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Dan Biersdorf is pursuing his master's in accounting analytics online while serving as vice president of studio operations at NBCUniversal in Atlanta, Georgia.

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MEET OUR ISCPA STAFF



MADELINE WARD

POSITION: Member engagement coordinator

HOMETOWN: Ollie, Iowa

ALMA MATER: University of Iowa, Tippie College of Business

COMMUNITY ACTIVITIES: Board president of synerJGy, the young professionals group affiliated with the Johnston and Grimes Chambers of Commerce, communications team member and ambassador for the Johnston Chamber of Commerce.

First job: Sales associate at Flirt Clothing Boutique

What I wanted to be when I grew up: Archeologist

I am passionate about: I am passionate about creating meaningful connections with people and finding ways to make a positive impact, whether it's through my work, my community, or everyday interactions.

What attracted you to ISCPA? I admire the organization's commitment to fostering professional growth and its meaningful impact on the industry. The opportunity to help shape the future of CPAs is both rewarding and exciting, and I'm eager to contribute to an organization that supports professionals at every stage of their career.

Tell us about your career history: I gained strong customer service experience in my first high school job working in a clothing boutique. During college, I interned at the Cedar Rapids Metro Economic Alliance, which allowed me to dive into community engagement, event planning, and economic development. After graduation, I further developed my skills in marketing and client relations working at Allegra Marketing. Each of these roles helped me grow professionally and ultimately led me to my current position at the Iowa Society of CPAs, where I focus on member engagement and contribute to the future of the accounting profession.

My favorite thing about my job so far: Is getting to learn something new every day and working with a team that's genuinely supportive. It's exciting to be in

an environment where people root for each other's success.

Best advice I ever received: To focus on progress, not perfection. It reminds me that it's okay to make mistakes as long as you're learning and moving forward.

When I have free time: I enjoy hanging out with friends, catching a comedy show, trying out new restaurants, or hitting the golf course when the weather's nice.

People don't know this about me, but: I am currently pursuing my Master's in Accounting at Iowa State University. I'm just a few credit hours away from meeting the 24-hour accounting requirement to sit for the CPA exam.

If I weren't a member engagement coordinator, you might find me: Out finding and excavating dinosaurs. It's a passion I've always had!

Special talent: Having extreme luck – whether it's winning raffles or finding the perfect parking spot, luck seems to always be on my side.

Favorite vacation spot: Camping at the Iowa State Fair with my entire family. It's one of my favorite traditions – great food, fun memories, and time together that I always look forward to.

Favorite quote: "Everything happens for a reason." It's a simple reminder to trust the timing of life and believe that every experience has a purpose.

I never leave home without: A Vitamin Water or a BodyArmor drink.

Favorite food: Buffalo chicken sandwich

Favorite app: TikTok

Favorite movie: Interstellar

Favorite musician: Jessie Murph

Best concert you've been to and where: Zach Bryan at the Nissan Stadium in Nashville.

Three words that describe me best: Driven, creative, and genuine.

Place I'd love to live: Nashville, Tenn.



SEPTEMBER 25 | THE MEADOWS EVENTS & CONFERENCE CENTER, ALTOONA

The Circle of Excellence recognizes outstanding individuals and firms for their leadership, dedication, and service. It also celebrates the future of the profession by honoring newly licensed CPAs, recent CPA Exam passers, and Iowa CPA Education Foundation scholarship recipients whose hard work and determination inspire us all.

WHAT TO EXPECT:

Award Presentations

Honor outstanding professionals who have gone above and beyond in their service and contributions to the CPA profession.

Iowa CPA Education Foundation Scholarship Awards

Celebrate the students receiving scholarships that will help support their path toward becoming CPAs.

New CPA Recognition

Welcome and applaud Iowa's newest CPAs as they begin their professional journey.

Outstanding Accounting Student Awards

Recognize top-performing students nominated by Iowa colleges and universities for their academic excellence and leadership.

CPA Exam Success Recognition

Congratulate those who have successfully completed the CPA Exam—an impressive milestone in any accounting career.

REGISTER AT WWW.IACPA.ORG/COE



Reminder! Iowa CPA shifts delivery

As announced in January, this Iowa CPA newsletter will continue to be produced and distributed by email 10 times a year. However, only four of those issues will be printed and mailed. To ensure you never miss an issue, be sure your profile is set up for the email delivery option of this publication.

1. Sign into the ISCPA website at www.iacpa.org; if you don't recall your login information, use the easy Reset Your Password feature.
2. Once logged in, go to Manage Communications under "Profile" in My ISCPA, or use this link: www.iacpa.org/my-cpa/subscriptions.
3. Select the box for "Iowa CPA newsletter" found in the Membership and Events category; you may need to scroll down the page to find. This will opt you in for email delivery.
4. Click the Save My Preferences button at the bottom of the page.

The website will continue to be your source for current and past issues of Iowa CPA regardless of your selected delivery method.

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The future of technology is now, and you don't want to be left behind. At the 2025 Technology Conference, the experts from K2 Enterprises return with insights, tools and guidance to help you confidently navigate a rapidly evolving digital landscape. Designed specifically for accounting, finance and business professionals, this two-day virtual event is packed with sessions that offer real-world applications, productivity boosters, and strategic innovations that will move your skills forward. With over 18 sessions on hot topics like data security, AI, Excel tips, QuickBooks, productivity hacks, CRMs, client accounting services, and beyond - this lineup offers something valuable for every finance and accounting professional.

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