



**Audit and Joint Interest Standing Committees  
Fall 2023 Meeting  
Thursday, September 21, 2023  
Colorado Springs, Colorado**

TIME (MT)	AGENDA ITEM	DISCUSSION LEADER
<b>COMBINED SESSION WITH AUDIT AND JOINT INTEREST</b>		
8:00 a.m.	<b>Welcome and Introductions</b> Antitrust Statement Introductions and First Timers	Matt Pilkington/Patricia Ellington
8:15 a.m.	<b>Guest Speaker - Basic Interviewing Skills for Financial Professionals</b>  Learning Objectives: <ul style="list-style-type: none"> <li>• Describe the interview process</li> <li>• Identify best practices for interviewing</li> <li>• Identify behaviors of deception when interviewing</li> </ul> <u>Program Level:</u> Basic <u>Pre-requisite:</u> None <u>Advance Preparation:</u> None <u>Delivery Method:</u> Group Live <u>Field of Study:</u> Specialized Knowledge <u>CPE Credits:</u> 1.5	Bret Hood
9:45 a.m.	<b>Break</b>	
10:00 a.m.	<b>Documents Review Task Force</b>	Matt Pilkington/Patricia Ellington
11:15 a.m.	<b>Model Form Interpretation-57 (Remote Technology Centers) Addendum 1</b> Deb Retzloff / Project Team  These sessions will consist of presentation and discussion of various COPAS publications. Learning Objectives: <ul style="list-style-type: none"> <li>• Describe the scope and purpose of the Documents Review Task Force and be prepared to facilitate discussion</li> <li>• Discuss COPAS publication issues identified by the task force</li> <li>• Describe and discuss the MFI-57 Addendum 1 draft</li> </ul> <u>Program Level:</u> Intermediate <u>Pre-requisite:</u> Some familiarity with the COPAS documents, their purpose and use, as well as some familiarity with general accounting standards <u>Advance Preparation:</u> None <u>Delivery Method:</u> Group Live <u>Field of Study:</u> Specialized Knowledge <u>CPE Credits:</u> 2.0	
11:45 a.m.	<b>End Combined Session - Move to Joint Interest and Audit Breakout Rooms</b>	



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<b>TIME (MT)</b>	<b>AGENDA ITEM</b>	<b>DISCUSSION LEADER</b>
<b>AUDIT STANDING COMMITTEE BREAKOUT SESSION</b>		
<b>11:45 a.m.</b>	<b>Welcome and Introductions</b> Antitrust Statement Introductions	<b>Matt Pilkington</b>
<b>11:50 a.m.</b>	<b>Roll Call Voting Representatives</b>	<b>Kim Goodwin</b>
	<b>Voting Items and Discussion</b> <ol style="list-style-type: none"><li>1. Spring 2023 Minutes</li><li>2. Summer 2023 Minutes</li><li>3. Audit Standing Committee Secretary</li></ol>	<b>Matt Pilkington</b>
<b>11:55 a.m.</b>	<b>Updates</b>  Emerging Issues Sub-Committee Report COPAS Board of Directors Report	Lucas Vaughn Kevin Launchbaugh
<b>12:00 p.m.</b>	<b>Other Business and Adjourn</b>	<b>Matt Pilkington</b>



<b>TIME (MT)</b>	<b>AGENDA ITEM</b>	<b>DISCUSSION LEADER</b>
<b>JOINT INTEREST STANDING COMMITTEE BREAKOUT SESSION</b>		
<b>11:45 a.m.</b>	<b>Welcome and Introductions</b> Antitrust Statement Introductions	<b>James Wright</b>
<b>11:50 a.m.</b>	<b>COPAS Board of Directors Report</b>	<b>Tom Batsche</b>
<b>11:55 a.m.</b>	<b>Roll Call Voting Representatives</b>	<b>Matt Hayward</b>
	<b>Voting Items and Discussion</b> 1. Employee Benefits Limitation (2024)	<b>James Wright</b>
<b>12:15 p.m.</b>	<b>Other Business and Adjourn</b>	<b>James Wright</b>