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Seventh Annual CAQ Symposium

August 9, 2015

Panelist Biographies

Corporate Social Responsibility Reporting and the Role of the Auditor

Moderator

Jim Powers, *CEO*
Crowe Horwath LLP

Jim Powers assumed the role of chief executive officer effective April 1, 2015. He has 36 years of experience in providing audit services to publicly and privately owned businesses in a variety of industries. In addition, he has extensive experience in all aspects of corporate finance, including mergers and acquisitions and private and public sector offerings, as well as in the areas of strategic planning and business process re-engineering. Jim has served three separate terms as a member of the firm's Executive Committee, including serving as its chairman in 2012-13. He previously led the firm's Audit and Financial Advisory businesses on a national basis. He also previously served as chairman of the firm's Accounting and Auditing Practice Committee, which was responsible for all policy aspects of the firm's accounting and auditing practices. Jim also served as managing partner of the firm's Indianapolis office, and chaired the firm retirement plan investment committee.

Panelists

Brendan LeBlanc, *Partner, Climate Change & Sustainability Services*
EY

Brendan LeBlanc has more than 20 years' experience working with global public and private companies to provide financial and non-financial advisory and assurance services. Brendan currently leads EY's Sustainable Business Solutions team within the Americas Climate Change and Sustainability Services practice. Brendan is a subject matter expert on sustainability metrics, reporting and assurance. He serves as an architect of EY's Purpose Led Transformation methodology and tools. Brendan brings extensive experience in implementing sustainability initiatives into internal balanced scorecards utilized to drive executive compensation. Brendan brings significant experience leading and coordinating several sustainability risk assessments, human rights engagements, conflict minerals engagements and sustainable sourcing reviews, including working with some of the leading manufacturers on sustainable sourcing programs, values-led sourcing programs and numerous third-party certification schemes. He serves as EY's representative on the World Business Council for Sustainable Development Liaison Delegate, Sustainability Accounting Standards Board Advisory Board, Education and Assurance Committees, SHIFT-Reporting and Assurance Framework Initiative-Advisor, International Integrated Reporting Council Working Group, and Global Reporting Initiative-North American Organizational Stakeholder Group. Prior to joining EY, Brendan was the founder and CEO of LeBlanc & Associates, a niche CPA firm focused on corporate social responsibility reporting and assurance services which issued the first reasonable assurance opinion on a sustainability report in the U.S. in 2008.

Beth Schneider, *Audit Director*
Deloitte & Touche LLP

Beth Schneider is an Audit Director in the Audit & Assurance Services in the National Office of Deloitte & Touche LLP. She is responsible for developing attest services in emerging areas, including sustainability, greenhouse gas emissions, conflict minerals reporting, XBRL and Integrated reporting. She also provides consultation support to the U.S. practice offices on matters concerning attest services and audit reporting. Beth has over 35 years of experience in the practice of public accounting. She is a member of the AICPA Assurance Services Executive Committee and the following AICPA ASEC Task Force and working groups: XBRL Assurance Task Force, Strategic Directions Working Group, and the Regulatory/Legislative Assurance and Advisory Working Group. Under the Auditing Standards Board, she chairs the Sustainability Task Force and is a member of the Performance Audit Task Force. She has also been a member of various other AICPA task forces and has participated in numerous industry and AICPA projects, including issues relating to the following industries: airline, health care, insurance, investment companies, public sector and telecommunications. Beth works with various industry groups, regulators and clients in responding to their needs for attest services in new and emerging areas. Beth served as a Technical Director at the Secretariat of the International Reporting Council from January 2012 through December 2013, assisting with the development of the International Integrated Reporting Framework. She is a member of IAASB's Integrated Reporting Working Group. She has authored a number of articles and papers on assurance-related matters.

Roger Simnett, *Professor of Accounting*
University of New South Wales

Roger Simnett is the Macquarie Group Foundation Scientia Professor of Accounting and Academic Director, Centre for Social Impact, at, UNSW Australia Business School. His research interests cover a range of international auditing/assurance issues aimed at improving audit/assurance quality and making policy recommendations. His current areas of interests include improving the measurement and assurability of corporate reporting for both financial and nonfinancial disclosures. He has published in the leading journals, including *The Accounting Review*, *Accounting, Organizations and Society*, *Auditing: a Journal of Practice and Theory* and *Contemporary Accounting Research*. Roger has a background in standard setting, serving for two terms on the Australian Auditing and Assurance Standards Board and being the first academic appointed as a member of the IAASB. He recently co-chaired the task force that developed the assurance standard on greenhouse gas emissions disclosures for the IAASB in 2012, was a member of the International Integrated Reporting Council working group and technical task force 2011-2014, and is currently a member of the International Integrated Reporting Council Assurance Task force.

Impact of Data Analytics on the Financial Statement Audit of the Future

Moderator

Joe Ucuzoglu, *Chairman and CEO*
Deloitte & Touche LLP

Joe Ucuzoglu is the chairman and chief executive officer for Deloitte & Touche LLP. As the leader of the U.S. audit practice, Joe is responsible for overseeing all aspects of the organization including execution of the firm's quality, innovation, growth, and talent strategies. Along with the 9,000 professionals comprising Deloitte's audit practice, Joe plays a crucial role in delivering exceptional value and insights to clients and the capital markets. He maintains significant audit client responsibilities, serving as the advisory partner for selected client engagements, and is a frequent speaker on issues impacting the audit profession and regulatory landscape. Joe also serves on Deloitte's Global Board of Directors. Previously, Joe was Deloitte's National Managing Partner for Government, Regulatory and Professional Matters. In this role, he was responsible for Deloitte's interactions with regulators and elected officials as well as overseeing the government affairs, public policy, independence, and ethics functions. Joe served as Senior Advisor to the Chief Accountant at the SEC, advising on complex accounting, auditing, and public policy matters, and interacting frequently with other governmental agencies and Congress. He serves on the board of directors of the U.S. Chamber of Commerce, the board of advisors of the SEC Historical Society, and the executive committee of USC's SEC Financial Reporting Institute. He is a member of the Committee on Capital Markets Regulation, an independent research organization dedicated to enhancing the competitiveness of U.S. capital markets and ensuring stability of the U.S. financial system, and is active in the CAQ.

Panelists

Jeff Burgess, *National Managing Partner of Audit Services* **Grant Thornton LLP**

Jeff Burgess is the National Managing Partner of Audit Services for Grant Thornton LLP. Previously, he served as the National Managing Partner of Professional Standards and Partnership Board member. Earlier, he was Partner-in-Charge of the firm's National Professional Practice Director Group and the National Professional Practice director for the Southeast region. Jeff also served as the Partner-in-Charge of the firm's Greensboro, N.C., office and as the Professional Standards Partner for the Carolinas practice, which includes offices in Charlotte and Raleigh, N.C. and Columbia, S.C. Jeff, who is a member of the firm's Senior Leadership Team, has extensive experience in numerous financial consulting projects, including Sarbanes-Oxley Section 404 compliance, acquisition and disposition due diligence, and process mapping and improvement projects. He has participated in operational and productivity improvement projects; deduction and chargeback process improvement projects; preparation of financial forecasts and projections; and numerous regulatory filings, including debt offerings and initial public offerings. Prior to joining Grant Thornton in 2002, Jeff spent more than 15 years with Arthur Andersen.

Walt Conn, *Global Head of Audit Methodology and Implementation* **KPMG LLP**

Walt Conn is an audit partner and Global Head of Audit Methodology and Implementation at KPMG, leading the firm's Global Services Centre, which develops and maintains audit methodology, guidance, tools, and training for use by KPMG member firms around the world. He also serves on KPMG's Global Audit Steering Group, which oversees the audit strategy for KPMG International and its member firms. Walt served on the U.S. Auditing Standards Board, the senior technical committee of the AICPA designated to issue auditing standards and guidance relating to private entities, from 2006 through 2009. From early 2004 to September 2008, Walt worked in the firm's Department of Professional Practice, where he assisted KPMG's engagement teams with the resolution of auditing issues, developed firm policy on professional practice matters, and followed the standard-setting and rulemaking activities of the PCAOB and the SEC. Previously, Walt was an audit partner in KPMG's Silicon Valley office, where he served software and other technology clients and worked on a number of high profile mergers and initial public offerings. Earlier, he spent time in the firm's Birmingham and Nashville offices and completed rotations in the firm's national office and in a practice fellowship for the ASB in New York. Walt is one of the firm's designated senior technical partners and has served on and chaired a number of task forces of the AICPA and the CAQ.

Mike Leonardson, *Partner, Americas Professional Practice, Auditing* **EY**

Mike Leonardson has 21 years of experience in public accounting, focusing on multi-national manufacturing and technology companies. Mike is currently serving in Americas Professional Practice-Auditing, focusing on technology enablement, data analytics, sampling methodologies and other auditing topics. Mike is leading the development of the firm's analytics capabilities and related methodology for the Americas and is also serving as the Global Client Service Partner to Generac. Mike previously served Joy Global, Rexnord, Diversey, Porsche, Voith, Steel Dynamics, Federal Signal, Stericycle, Harley-Davidson, Hewlett Packard, Whirlpool, Tecumseh Power Company, and FTD Group. Mike has significant experience managing stakeholder expectations, working with public, private and private equity backed clients. Mike is an advisor to clients on accounting and reporting issues, operational matters, acquisitions due diligence and internal control considerations. Having lived and worked in the United States and overseas, Mike has extensive experience in global engagement management, SEC reporting, and technical accounting matters, including purchase accounting, restructuring, accounting for income taxes, percentage of completion accounting and GAAP conversions.