IESBA Outreach and Related Activities for 2022  
(January – August 2022)

January

- Presentation to the New York State Society of CPAs’ (NYSSCPA) Sustainability Accounting and Reporting Committee on the IESBA’s Sustainability initiative (Jules, Sramko)
- Forum of Firms meeting (Dias, Siong, Jules)
- Meeting with representatives of the Abu Dhabi Accountability Authority (Clark)
- Meeting on Ethics and Technology with the Head of Artificial Intelligence and member of the Executive Committee at the World Economic Forum (B. Friedrich, L. Friedrich, Leung)
- Meeting on PAIB issues related to Technology with alternative asset management firm HRL Morrison (B. Friedrich, Leung)
- Meeting on Public Sector Ethics and Technology issues with senior Government of Canada representatives (B. Friedrich, Leung)

February

- IAASB roundtable on Disruptive Technology (Huesken)
- IOSCO Sustainable Finance Task Force roundtable on sustainability-related assurance (Dias, Gunn, Siong, Jules)
- Roundtable on Technology and Ethics hosted by the Pan African Federation of Accountants (B. Friedrich, L. Friedrich, Borgerth, Clark, Huesken, Nisoli, Leung)
- Meeting with Hilde Blomme (Deputy CEO), Liesbet Haustermans (Chair, Professional Ethics Working Party), and Harun Saki (Staff), Accountancy Europe (Dias, Siong, Jules)
- ASEAN Federation of Accountants workshop on SMO 4 (Code of Ethics) (Kwan)
- Meeting with representatives of the Institute of Electrical and Electronics Engineers (IEEE) and IFAC (B. Friedrich, L. Friedrich, Siong)
- Meeting with representatives of the International Bar Association (IBA) and IFAC on the topic of non-trial resolution (Dias, Siong, Jules)
- Interview with CPA Canada Foresight for its podcast series to discuss ethical challenges and opportunities related to the future of the profession, with a focus on technological innovations (B. Friedrich, L. Friedrich)
- Meeting with CPA British Columbia Regulatory Chairs in relation to regulatory and standards trends (L. Friedrich)
- Meeting with representatives of the CPA Canada Public Trust Committee to discuss recent IESBA pronouncements and the organization’s continued work on a principles-based Code (B. Friedrich)
- Interview with ICAS magazine, February 2022 edition (Siong)
March

- IESBA CAG meeting (Dias, Lee, Borgerth, Poll, Friedrich L., Gunn, Siong, Jules, Kwan, Leung, Vijian, Sramko)
- Virtual presentation on Ethics and Technology to the CFO Circle hosted by the Malaysian Institute of Accountants (MIA) (Huesken)
- Meeting with Larry Bradley, Global Head of Audit and Assurance, KPMG – New York, USA (Dias, Lee, Siong)
- Meeting with representatives of IEEE and IFAC – New York, USA (Dias, B. Friedrich, L. Friedrich, Siong, Leung)
- Meeting with the International Organization of Securities Commissions (IOSCO) Committee 1 (Dias, Thomadakis, Gunn, Siong, Jules)
- Meeting with the Standards Coordination Working Group (SCWG) of the International Forum of Independent Audit Regulators (IFIAR) (Dias, Lee, Siong, Jules, Kwan)
- Panelist at the Arab Federation of Capital Markets (AFCM) annual conference (Borgerth)
- Forum of Firms meeting (Dias, Siong, Jules)
- IOSCO-International Valuation Standards Council (IVSC) virtual roundtable on the topic of valuations (Babington)
- Presentation to the CPA Alberta Board in relation to ethical leadership and the four joint IESBA Technology Working Group thought leadership papers (B. Friedrich, L. Friedrich)
- Interview for CPA Canada magazine in relation to bias, mis- and dis-information in the context of professional ethics (B. Friedrich, L. Friedrich)
- UK outreach, London:
  - Meeting with Sir Jonathan Thompson (CEO) and Sarah Rapson (Head of Supervision), UK Financial Reporting Council (Dias, Babington, Siong)
  - Meeting with investor representative Natasha Landell-Mills, Sarasin & Partners (Dias, Siong)
  - Meeting with Gian Piero Cigna (Acting Director and Chief Counsel, Financial Law Unit) and Vesselina Haralampieva (Senior Counsel) (Dias, Siong)
  - Meeting with Prof. Colin Mayer of University of Oxford (Dias, Siong)
  - Meeting with Neil Acres (Managing Director, Head of Government & Regulatory Affairs) and Meggin Thwing Eastman (Managing Director, ESG Research), MSCI (Dias, Siong)
  - Meeting with Michael Izza (CEO), Iain Lowson (Chair of CCAB Ethics Group), Peter van Veen (Director, Corporate Governance and Stewardship), and David Gomez (Senior Lead, Ethics), Institute of Chartered Accountants in England and Wales (ICAEW) (Dias, Siong)
  - Meeting with Nandini Sukumar (CEO), World Federation of Exchanges
April

- UK outreach, London (cont’d):
  - Meeting with Helen Brand (CEO), Maggie McGhee (Executive Director – Strategy & Governance), Mike Suffield (Director – Professional Insights), and Sundeep Takwani (Director – Practice Regulation), Association of Chartered Certified Accountants (ACCA) (Dias, Siong)
  - Meeting with James Chalmers (Global Assurance Leader) and Gilly Lord (Global Leader – Public Policy and Regulation), PwC (Dias, Siong)
  - Meeting with Neil Morris (Global ESG Assurance Methodology Lead), Renzo Francescutti (Head of Global Independence), Sheri Anderson (Head of Global Audit Quality), and Margot Tenenbaum (COO, Global Independence), KPMG (Dias, Lee, Siong)

- Meeting with the IFAC Small and Medium Practices (SMP) Advisory Group (Dias, Huesken, Siong, Jules, Leung, Sramko)

- Meeting with the Monitoring Group (Dias)

- Meeting with Imran Vanker (Director, Standards) and Liezel du Preez (Professional Manager, Auditor Ethics), Independent Regulatory Board for Auditors (IRBA) (Dias, Siong)

- IESBA global webinar on the proposed technology-related revisions to the Code (Huesken, Driscoll, Leung)

- Presentation to the NYSSCPA on the IESBA’s Technology and Engagement Team – Group Audits (ET-GA) Exposure Drafts (Huesken, Jules, Leung)

- Meeting with representatives of the Institute and Faculty of Actuaries on Ethics and Sustainability to discuss the IESBA’s sustainability initiative (Babington)

- Meeting with representatives of the International Sustainability Standards Board (ISSB) to discuss the IESBA’s sustainability initiative (Babington, Jules)

- IESBA global virtual roundtables on enhancing ethics considerations relating to tax planning and related services (Poll, Chaudhary, Endsley, Wijesinghe, Dias, Siong, Vijian)

- IESBA global webinars on the proposed revisions to the Code relating to the Definition of Engagement Team and Group Audits (ET-GA) (Lee, Pinkney, Canavan,¹ Siong, Vijian)

- Meeting with Alan Young, EY Global Assurance Leader; EY Helix and Global Emerging Technology Standards Leader, to discuss ethics and technology (B. Friedrich, Clark, Leung)

May

- Participation in the International Auditing and Assurance Standards Board’s (IAASB) third and final Less Complex Entities (LCES) roundtable – Paris, France (Dias)

- Presentation on the IESBA’s NOCLAR provisions to representatives of the International Bar Association’s (IBA) Anti-Corruption Committee, Ethics Committee and Tax Committee, with invited representatives of the American Institute of Certified Public Accountants (AICPA) and participation of IFAC staff (Dias, Siong, Jules, Kwan)

¹ Ms. Denise Canavan, former IESBA Technical Advisor and member of the ET-GA Task Force
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• Meeting with Accountancy Europe’s Professional Ethics and Competences Working Party and IAASB & PCAOB Working Party to discuss the ET-GA Exposure Draft (Lee, Adam, Canavan, Pinkney, Siong, Sramko)

• Roundtable on the ET-GA Exposure Draft hosted by the Australian Accounting Professional & Ethical Standards Board (APESB) (Lee, Wijesinghe, Vijian)

• Presentation at the South African Institute of Chartered Accountants (SAICA) Tech Talk’s monthly webinar titled “Ethics in Practice Series” to discuss ethics and technology (Lee)

• Presentation to Colombo University accounting students in Sri Lanka on the importance of the Code for the accounting profession and the restructured Code (Wijesinghe)

• Meeting with Jasna Voje (Policy Officer, DG Taxation and Customs Union), and Adrian Kelly, European Commission (Poll, Endsley, Wijesinghe, Vijian)

• Presentation at the PwC Global Ethics and Compliance Professionals meeting (Dias, Endsley, Siong, Jules)

• US outreach, New York and Washington DC:
  o Meeting with Wallace (Wally) Gregory (Global Regulatory, Independence & Conflicts Leader) and Denise Canavan (Global Independence Leader), Deloitte (Dias, Siong, Jules)
  o Meeting with Colleen Conrad (Executive VP and COO), National Association of State Boards of Accountancy (NASBA) (Dias, Siong, Jules)
  o Meeting with Jeff Mahoney (General Counsel), Council of Institutional Investors (CII) (Dias, Siong, Jules)
  o Podcast interview with Council of Institutional Investors, *The Voice of Corporate Governance* (Dias)
  o Meeting with Toni Lee Andrews (Director Professional Ethics), Ellen Goria (Associate Director, Professional Ethics), and Samantha Miller (Reputation Team Member), AICPA (Dias, Siong, Jules)
  o Meeting with Julie Bell Lindsay (CEO), Dennis McGowan (Vice President, Professional Practice) and Vanessa Teitelbaum (Senior Director, Professional Practice), US Center for Audit Quality (Dias, Siong, Jules)
  o Meeting with Paul Munter (Acting Chief Accountant), Nigel James (Senior Associate Chief Accountant), Anita Doult (Senior Associate Chief Accountant), Jasdeep Mangat (Associate Chief Accountant), Vassilios Karapanos (Associate Chief Accountant), Sarmad Makhdoom (Associate Chief Accountant), Robert Choromanski (Professional Accounting Fellow), Meagan Van Orden (Professional Accounting Fellow), and Samantha Demy (Professional Accounting Fellow), US Securities and Exchange Commission (SEC) (Dias, Siong, Jules)
  o Meeting with Tone Maren Sakshaug (Partner and Global IFAC Independence Center Leader), Brian Lynch (Partner and Regional Independence Leader for Americas FSO and AICPA Professional Ethics Executive Committee Chair), Sylvie Soulier (Partner and Global Independence Leader for Asia Pacific), Gaeron McClure (Partner and US and Americas Independence Leader), Katherine Fritts (Partner and Global Tax Quality Leader), Diane Larsen (Partner and Global Professional Practice and IAASB Board member), and Katie Kummer (Partner and Global Public Policy Leader), EY (Dias, Huesken, Siong, Jules)
2022 IESBA Outreach and Related Activities
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- Virtual Meeting with Barbara Vanich (Acting Chief Auditor), Stephanie Hunter (Assistant Chief Auditor), Marc Joseph (Assistant Director), David Hardison (Associate Counsel), and Dani Verbeck (Assistant Chief Auditor), US Public Company Accounting Oversight Board (PCAOB) (Dias, Siong, Jules)

- Meeting with Accountancy Europe’s Professional Ethics and Competences Working Party (PEC) and the Corporate Reporting & Digitalisation Task Force (CRDIGI) to discuss the IESBA’s Technology Exposure Draft (Huesken, Nisoli, Fukukawa, Driscoll, Barbour, Siong, Jules, Leung)

- IESBA-National Standard Setters (NSS) meeting (Dias, Lee, Babington, Friedrich L., Siong, Jules, Kwan, Leung, Vijian, Sramko)

- Update on the IESBA’s sustainability initiative to the Global Public Policy Committee (GPPC) (Babington, Siong)

- IESBA webinar on Instilling Public Trust and Confidence in Sustainability Reporting and Assurance with guest speaker Sacha Sadan (Director of ESG), UK Financial Conduct Authority (Dias, Babington, Siong, Jules, Sramko)

- Meeting with Dr. Stavros Thomadakis, former IESBA Chairman, to discuss matters relating to the IESBA’s Tax Planning project (Poll, Chaudhary, Endsley, Wijesinghe, Siong, Vijian)

- Presentation to the NYSSCPA on the IESBA’s Strategy Survey (Endsley, Jules)

- Meetings with IOSCO and IAASB to discuss sustainability reporting and assurance (Dias, Babington, Siong, Jules, Sramko)

- Meeting with Rodrigo Buenaventura, Chair of the Spanish CNMV and Chair of the IOSCO Sustainability Task Force W1 – Reporting and Disclosure – Madrid, Spain (Dias)

- Meeting with Carlta Vitztum (Head of Communications), IOSCO – Madrid, Spain (Dias)

- IESBA global webinar on the revisions to the Definitions of Listed Entity and Public Interest Entity in the Code (Ashley, Mintzer, Kwan)

- Meeting with representatives of the Abu Dhabi Accountability Authority (Clark, Kwan)

- The Accountant Article, An Actionable Guide to Diversifying Global Accounting Talent for the Profession’s Future (Jules)

- IFAC Gateway Article, Three Catalysts for Change and Seventy-Nine Actionable Practices to Progress DE&I in the Accounting Profession (Jules)

- Meeting with Albert Baker, Tax Partner, Deloitte, to discuss matters relating to the IESBA’s Tax Planning project (Poll, Chaudhary, Endsley, Mintzer, Wijesinghe, Siong, Vijian)

- Meeting with Beena Ammanath, Executive Director, Global Deloitte AI Institute, to discuss ethics and technology (B. Friedrich, Borgerth, Nisoli, Kramerius, Takwani, Jules, Leung)

- Meeting with representatives of IFAC’s International Education Panel on Accountancy Education, to discuss ethics and technology (B. Friedrich, Jules)

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2 Mr. James Barbour, former IESBA Technical Advisor and member of the Technology Task Force
3 Mr. Mike Ashley, former IESBA Member and IESBA Public Interest Entity (PIE) Task Force Chair
4 Mr. Sundeep Takwani, former IESBA Technical Advisor and member of the Technology Working Group
June

- Presentation on IESBA’s Sustainability initiative at IFAC’s Public Policy & Regulation Advisory Group Meeting (Siong)
- Meeting with representatives of the Global Reporting Initiative (GRI) alongside IAASB Chair and staff to discuss matters relating to sustainability reporting and assurance (Dias, Poll, Siong, Jules, Sramko)
- Roundtable on External Audit and Sustainability Assurance hosted by the Financial Stability Board, Madrid, Spain (Dias, Gunn)
- Meeting with Monitoring Group (Dias)
- Presentation at IFAC Board Meeting (Dias, Gunn, Siong)
- Panelist at the 8th Annual Global Corporate Governance Colloquium (GCGC) hosted by the University of Oxford to discuss “Embedding Purpose into Regulatory Frameworks” (Dias)
- Keynote speaker at the Malaysian Institute of Accountants (MIA) webinar series “Creating A Culture of Ethics” to discuss “Professional Competence and Due Care” (Lee)
- Presentation to the Organisation for Economic Cooperation and Development’s (OECD) Tax and Other Crimes Task Force on the Role of Professional Associations in Fighting Enablers of Tax Crimes and Other Financial Crimes (Dias, Lee, Vijian)
- Meeting with Hilary Eastman, Head of Global Investor Engagement, PwC (Dias, Siong)

July

- Outreach to Abu Dhabi Accountability Authority and other middle-east stakeholders – Abu Dhabi (Lee, Clark, Kwan)
- Article in the July 2022 Special Edition of the ICAI Journal, The Chartered Accountant (Dias)

August

- Presentation at Crowe Global Conference (Poll)