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Shortage

The advisory group began meeting this month and will report on its progress at the AICPA's Fall Council meeting in October.

Isaac M. O'Bannon • Jul. 31, 2023



The American Institute of CPAs (AICPA) has formed an advisory group representing a broad spectrum of the accounting profession that will help shape a national strategy to address the profession's talent shortage, including accounting students who go on to obtain a CPA license.

The National Pipeline Advisory Group's work is part of a multi-pronged approach that includes an intensive effort to use technology, surveys and in-person forums to solicit insights and input from a diverse array of groups around the country.

The advisory group includes members who represent a range of perspectives,

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ConvergenceCoaching LLC, will facilitate the collaborative effort. Jennifer Wilson of ConvergenceCoaching will be the group's lead facilitator and will be supported by other members of her team. ConvergenceCoaching is a national leadership and management consulting firm that has worked extensively on accounting-related projects in leadership development, change management, and data analysis.

"The slowdown in young adults choosing accounting as a career is a collective problem for the CPA profession and requires a collective and inclusive solution," said Susan Coffey, the AICPA's CEO of public accounting and executive sponsor of the initiative. "We want to make sure we have a broad range of viewpoints and perspectives to help define the profession's pipeline strategy moving forward. This deep, capable, and experienced group will play a critical role in guiding that conversation and subsequent call to action."

Members of the advisory group are:

- **Jeannine Birmingham**, CPA, CAE, CEO, Alabama Society of CPAs
- **Ken Bouyer**, CIA, EY Americas DEI recruiting leader and member of the AICPA National Commission on Diversity & Inclusion
- **Susan Coffey**, CPA, CGMA, CEO of Public Accounting, AICPA
- **Daniel J. Dustin**, CPA, Vice President of State Relations, National Association of State Boards of Accountancy (NASBA)
- **Joe Falbo**, CPA, CGMA, Partner at Szymkowiak & Associates CPAs, PC, and past president of the New York State Society of CPAs
- **Jonathan Hauser**, CPA, Partner at KPMG and chair of the Illinois CPA Society
- **Angela Ho**, CPA, CGMA, Chief Compliance Officer, OceanFirst Bank
- **Kathy Johnson**, CPA, CFF, CGMA, Vice President, JS Held, adjunct professor, California State University, San Bernadino and past chair, California Society of CPAs

- **Lori Kaiser**, CPA, CGMA, Founder and CEO of Kaiser Consulting, LLC and past

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Chair of the Management Association of CPAs

- **Jodi Ann Ray**, CAE, President and CEO, Texas Society of CPAs
- **Marcus Rayner**, Managing Director, U.S. Public Policy at PwC
- **Rick Reisig**, CPA, Principal, Pinion, LLC, and board chairman, NASBA
- **Kimberly Scott**, CAE, President and CEO, Washington Society of CPAs
- **Lindsay Stevenson**, CPA, CGMA, Chief Transformation Officer, BPM and board member, Association of International Certified Professional Accountants
- **Mark Taylor**, CPA, Director, University of South Florida's Lynn Pippenger School of Accountancy and 2023-24 president, American Accounting Association
- **Emily Walker**, CAE, Vice President, Advocacy, Virginia Society of CPAs
- **Shelly Weir**, President and CEO, Florida Institute of CPAs

The advisory group began meeting this month and will report on its progress at the AICPA's Fall Council meeting in October. A resolution passed by AICPA Council members in May called for a collaborative process resulting in a research-driven national pipeline strategy that, among other things, addresses the image of the profession as well as educational and experience requirements, and outlines short and long-term actions that address the profession's human capital needs. The Council resolution affirmed a commitment to preserving mobility for CPAs, a critical element of the system of state licensure allowing CPAs to practice across licensing jurisdictions.

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