



## 2016 Primerus Global Conference October 13 – 16, 2016

### Living the Six Pillars – Quality Assurance Board & Cyber Security Updates

Saturday, October 15, 2016 (9:00 a.m. – 9:45 a.m.)

Presented by:

David Villadolid – Burch & Cracchiolo (Phoenix, AZ)  
J. Paul Zimmerman – Christian & Small (Birmingham, AL)

- **History**
  - started with Quality Assurance Ctee
  - QAB and Charter formed
  - Charter mandates that we
    - manage survey
    - facilitate mediation of disputes
    - identify best practices
    - provide recommendations
- **Philosophy**
  - distinguish duties of Accreditation Board
  - resources, not rules
  - many rules/requirements already in place
    - in different jurisdictions
    - reflect the laws and culture of those countries
    - procedural & civil rules
    - ethical rules
  - guidelines should reflect and respect the diversity of our group
  - also want to avoid inadvertently creating liability for our members
    - by setting rules or standards which can be held against our members
- **Accomplishments**
  - survey & referral reporting form (req'd by Charter)
  - requiring written engagement letters for initial Primerus referral
  - ethics requirement (part of Global agenda)
  - Cybersecurity Ctee
    - brief history
- **Future**
  - what do the members want QAB to work on?
    - suggestions/ideas?
    - Q&As



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