The Institute of Internal Auditors
Philadelphia

Member NEWSLETTER

Spring 2026 Issue #26-1

Newsletter Chair: Todd Garfield

Presidents Message

Dear Philadelphia Chapter Member,

As we gather for our Spring Conference, I am filled with excitement not only for the arrival of warmer weather and the promise of summer vacations but also for the opportunity to step into my new role as president during this season of growth and renewal. This year's conference carries a particularly powerful theme: "Securing the Next 250: Risk, Resilience, & Revolutionary Thinking."

This theme resonates deeply with the internal audit profession, as it challenges us to look ahead and prepare for the next era of opportunities and challenges. Just as Philadelphia has been a cradle of innovation and leadership for over two centuries, internal auditors today are tasked with securing the future of our organizations by being forward-thinking, resilient, and revolutionary in our approach. To secure the future, we must embrace revolutionary thinking, challenging the status quo, adopting innovative technologies, and applying strategic foresight to guide our organizations through uncertainty.

Resilience is another cornerstone of our work. As internal auditors, we are trusted advisors who ensure that organizations can withstand disruptions and emerge stronger. By embedding resilience into our processes and fostering a mindset of adaptability, we safeguard not only the present but also the long-term success of the entities we serve. Finally, this theme reminds us of the importance of investing in the leaders of tomorrow. Whether mentoring emerging professionals, creating inclusive learning environments, or modeling curiosity and courage, we are shaping the next generation of internal auditors who will carry forward our legacy of leadership. The next 250 years of innovation and progress depend on how we lead and inspire today.

Together, we are writing the next chapter: one defined by risk management excellence, resilience in the face of challenges, and revolutionary thinking that drives meaningful change.

Lastly, I want to extend a huge THANK YOU to our spring conference planning committee. Your hard work and vision have made this event possible.

Thank you. I look forward to learning, connecting, and leading alongside you as we embrace the warmth of spring, the excitement of summer, and the opportunities that lie ahead in securing the next 250!

Thank you. I look forward to learning, connecting, and leading alongside you.

Jamie Ohare
President, Philadelphia Chapter

Career Opportunities

As a service to our Philadelphia Chapter membership, we post and maintain job postings on our IIA Philadelphia LinkedIn website allowing members who are in need of an opportunity (or a change of scenery) to pursue opportunities with local employers who are looking to fill their audit related staffing needs. This service has always been provided at no cost and viewed as a continuing benefit of membership in our Chapter.

If you are looking to fill a staffing need, we can post your job opportunity(s) on our IIA Philadelphia Chapter LinkedIn. For job seekers, head to our Chapter's LinkedIn to review recent job postings.

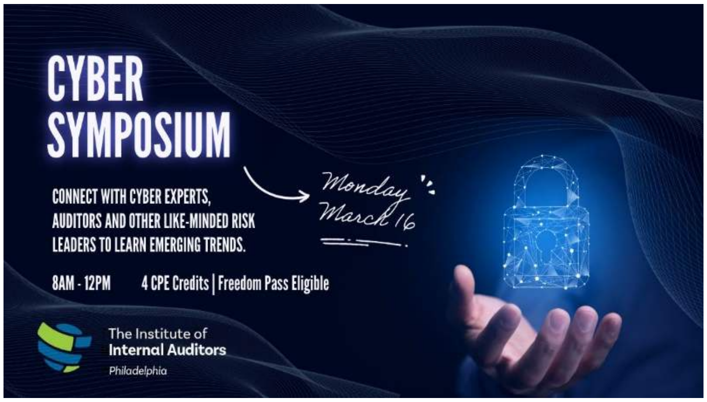
If you are searching for staff, please email your opportunity, including contact information (i.e., name, title, email address, phone) for each opening and a link to the online posting to Dave Aubrey, Chair, Employment Committee (djaubrey@drpa.org). Dave can also answer questions pertaining to employment and job posting.

Chapter Achievement Program (CAP) Report

The Chapter Achievement Program (CAP) has long been designed to reward and recognize chapters that go above and beyond in serving their members. All CAP activities are derived from the North American Strategic Plan, ensuring alignment with the broader goals of the profession. Chapter status levels are progressive: to achieve Bronze status, a chapter must fulfill all Bronze requirements; for Silver, all Bronze and Silver requirements; and for Gold, all Bronze, Silver, and Gold requirements. Chapters who meet all Bronze, Silver and Gold requirements for 10 consecutive years earn Platinum, 20 consecutive years earn Ruby and 25 consecutive years earn Sapphire.

Thanks to the dedicated service of our leadership and members, the Philadelphia Chapter achieved a Ruby designation in 2024 and continued to maintain this designation in 2025, a testament to our ongoing commitment to excellence.

Event Spotlight



On March 16th, the Cyber Symposium Foundation hosted a 4-hour Cyber Symposium, bringing together risk experts, internal auditors, and cybersecurity professionals to explore the most pressing cyber risks organizations are expected to face in the year ahead. Through a series of focused presentations, participants examined evolving cybersecurity challenges, including data breaches, regulatory changes, and emerging threat trends anticipated for 2026. Discussions emphasized the importance of proactive threat intelligence, adaptive security measures, and strengthening employee training to keep pace with increasingly sophisticated attacks.

A key focus of the symposium was building resilient cybersecurity programs, particularly in remote and hybrid work environments. Attendees explored strategies for secure communication, continuous monitoring, and maintaining operational continuity across decentralized teams.

The event also addressed upcoming regulatory and compliance requirements, offering practical guidance and best practices for internal auditors overseeing cybersecurity controls. Sessions highlighted cyber risk management frameworks for assessing control design and effectiveness, along with insights into incident response planning and lessons learned from real-world scenarios.

Finally, the symposium examined the growing impact of artificial intelligence and machine learning in cyber defense, as well as the rising importance of third-party risk management, equipping participants with forward-looking strategies to strengthen organizational resilience.

Thank you to everyone who joined and contributed to a thoughtful, engaging, and forward-focused Cyber Symposium Foundation event.

Internal Audit Short Story

Title: The Model That Spoke Too Confidently

In the city of Northbridge, decisions moved fast, some said faster than humans. At the center of it all sat Argus, a powerful AI model used to approve loans, flag fraud, and recommend pricing. Executives loved Argus. It was consistent, confident, and never tired.

A little too confident, thought Mira the Meerkat, Director of Internal Audit.

Mira didn't dislike AI. She had simply learned, over years of auditing, that anything making decisions without explaining itself deserved closer attention. That belief was tested one morning when a regulator's letter arrived asking the company to explain how automated decisions were monitored for bias, overrides, and accountability.

Mira assembled her team immediately. Leo the Llama, calm and analytical, focused on governance frameworks, while Echo the Bat specialized in model behavior and anomaly detection. "The business thinks we use AI," Mira said. "But that's not the risk. The risk is that AI is making decisions without clear ownership."

They began with straightforward questions. Who approved Argus for each use case? What data trained it, and what data had been excluded? When Argus makes a mistake, who is accountable—the model, the developer, or management?

The room went quiet.

Leo finally spoke. "There's no formal model inventory, and no committee reviewing changes." Echo added, "And no one can explain why Argus denies certain edge cases. We test outputs, but not logic drift over time."

This wasn't a traditional control failure. Transactions reconciled, logs existed, and performance metrics looked strong. But governance, oversight, and human judgment were thin.

When Mira met with leadership, she didn't lead with findings. She led with framing. "We don't need to ban AI," she said. "We need to audit it like a decision-maker, not a tool."

She proposed three guardrails: clear ownership for every AI-enabled decision, ongoing monitoring for bias and model drift, and documented human override and escalation paths. Argus would continue to run, but now it would run under watch.

Months later, when examiners returned, the conversation was different. It wasn't defensive or reactive—it was clear. Northbridge hadn't slowed innovation; it had made it auditable.

That evening, Mira looked out over the city lights and smiled. Internal Audit hadn't built the model, but it had ensured someone was responsible for what the model decided. In a world where algorithms increasingly shape outcomes, that accountability mattered more than speed. And that, Mira knew, was exactly where Internal Audit was meant to stand. And as AI continued to evolve, Internal Audit remained the steady voice asking not just can we do this, but should we—and under what controls.

Member Anniversaries

35 Years
David Aubrey
Laurie Riggs
Mafalda Dennett

30 Years
Mario Catanese
Jennie A. Mercurio
Edward Merneda
Alan C. Sheppard

25 Years
Susan G. Allem
Keith M. Anderson
Moreen A. Bailey
Andrea G. Bayline
Patricia K. Hardy
Jeffrey Keller
Brian Kerr
Kimberly Lake
Lynette Lee
Jerome Park
Dominic Pasqualino
Caterina Romeo
William J. Schroeder
Lesley Wright
Dim Sukte

20 Years
Ahmed Abdulai
Kevin Basden
Matthew Bogusch
John Coroniti
Ketki Dhamanwala
Jeremiah Go
Gregory Hagopian
Courtney Henry
Nyanquoi Jones
Zaineb Cordelia Konialian
Robert Koob

20 years (cont.)
Nicholas Matejik
Christiana Oppong
Gregory Pellicano
Anthony N. Puccino
Lawrence Reuter
Chris Ricevuto
Douglas Sasso
Edward Schmid
Neil Schoenberg
Lindsay Wolf
Susanne Woodside

15 years
Johny Chowdhury
Caroline Conner
Nerys Davies
Reebu George
Sean Hanlon
Ajanta Jain
David Junod
James Kinney
David Kneller
Sudhir Kondisetty
Adrienne Larmett
Felix Leyderman
Matthew McDade
Philip Ollendike
Ashley Michele Pastor
Jennifer Romano
Jeffrey Szmerda
Jacob Watts
Scott Weiland
Colleen Wolf

10 years
Katlyn Andrews
James Bodalski
Keith Bronikowski
Eric Bunting
Regina Carlson
Eric Cortese

10 years (Cont)
Jason Czubachowski
Anita DeCostanza
Gene Feyl
Matthew Fish
Elvira Grach
Ashley Hunsberger
Grace Jang
Monika Jonce
Megan Jones
Paul Kim
Floyd Kingsley
Christina Krone
Jeff Krull
Samuel Lathrop
Jin Lee
Daniel Leeds
Justin Lepard
Mary Lorenz
Steve Mariotti
Patrycja Matus
Francis McCann
Kelly McGuire
Rachel Myslinski
Danny Nguyen
Catherine Nikol-Ward
Stephanie Oliver
Leno Pu
James Schoppe
Alfred Scott
Cody Shields
Andrew Simone
Matthew Skala
Nikole Smith
Kelly Unger
David Wang
John Ware
R Charles Waring
Jonathan Weiss

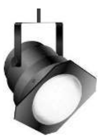
Certifications

🎉 **CONGRATULATIONS** 🎉

to the following Philadelphia IIA Chapter members on their recent IIA certifications!

Certified Internal Auditor (CIA)

Helene Segal
Jamall Thompson
Cheryl Mulcahey
Maxwell Oliphant



Officer Spotlight:

Emilie Boyer

Emilie Boyer is a Business Risk and Controls Manager at Grant Thornton Advisors LLC with more than eight years of experience supporting internal controls over financial reporting (ICFR), SOX compliance, and internal audit programs. Her experience spans the full lifecycle of control programs—from readiness and implementation through helping organizations operate and sustain mature, well functioning internal control environments.

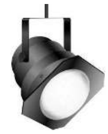
Throughout her career, Emilie has led engagements across a wide range of industries and company sizes, supporting both privately held organizations and large, global companies. She began her career in Grant Thornton's Metro DC office after graduating from the University of Maryland with a B.S. in Finance, where she spent seven years building a strong foundation in internal audit and controls focused work. Two years ago, Emilie relocated to the Greater Philadelphia region and is now a proud resident of Media, Pennsylvania.

What Emilie finds most meaningful in her work is partnering closely with process owners, control owners, and management teams. She values a collaborative approach to understanding how processes truly operate and helping design and implement controls that are practical, sustainable, and aligned with business realities. Emilie's mission is to educate and support stakeholders and to help demystify internal controls by removing the perceived "scariness" often associated with them. She is also deeply committed to mentoring and developing her teams, with a focus on building technical judgment, confidence, and a strong foundation in internal audit and SOX concepts. Beyond her role at Grant Thornton, Emilie is actively engaged in the professional community. She will soon serve as Programs Chair of the IIA–Philadelphia Chapter, supporting initiatives focused on member engagement, professional development, and connection across the internal audit community. She is also an active member of POWER (Power of Professional Women) in Philadelphia and helps lead Grant Thornton's Greater CAE Advisory Board alongside fellow board member Adam Ross. Through this forum, Emilie collaborates with chief audit executives and internal audit leaders to exchange perspectives on emerging risks, governance challenges, and evolving audit practices.

Outside of work, Emilie enjoys reading, traveling, baking, and spending time with loved ones.

Officer Spotlight:

Brian Care



Brian Care is a Manager at Protiviti, focusing on Internal Audit and Financial Advisory, where he has spent the last 4 years utilizing his skills to enhance corporate governance and risk management processes through a broad array of internal audit consulting services dealing with internal control structure, financial statement, operational and enterprise-wide risks as well as overall business process improvement. Brian's work focuses on SOX and operational audits of his clients' business functions and processes.

Brian is a Certified Public Accountant (CPA), Certified Internal Auditor (CIA) and he holds Bachelors' of Science in Accounting and Finance with a minor in Economics from Indiana University of Pennsylvania. Prior to joining Protiviti in 2022, Brian began his career in public accounting, where he spent three years at Baker Tilly US, providing external audit services in the Commercial Audit line focusing on Construction and Real Estate clients and Employee Benefit Plan audits.

Outside of his client work, Brian is deeply committed to advancing the internal audit profession and giving back to the local community. He actively supports the IIA–Philadelphia Chapter, helping organize the last 3 Fall/Spring conferences and recently becoming an officer for the 2026-2027 year. Brian's passion for caring for and empowering others extends to his involvement with Protiviti's i-On-Hunger Employee Network Group, which is an internal initiative to fight food insecurity in our local communities. Brian has been the head of the committee since 2023 and has planned quarterly volunteer events for the office that have provided over 130,000 meals to those in need in the Philadelphia area.

In his personal time, Brian is a self-proclaimed foodie and spends his free time eating and drinking his way through Philadelphia's food scene. When he's not eating, Brian also enjoys Pilates, lifting, running (outside running only – can't with the treadmills), spending time with his family and friends, and rotting on the couch with his chihuahua, Benito.

The Current IIA Philadelphia Chapter Board of Governors

(2026-2027)

Ex-Officio – Two Past Presidents

Greg Dusing
Sean McErlean

Officers

Jamie Ohare
Emilie Boyer
Daniel Rosa
Brian Care
Liz Gulla
Allen Choi

Term Expiring 2027

Laurie Riggs
Adam Ross
Matt Skala
Michael Levy

Term Expiring 2028

Lee D'Ambrosio
Kevin Fitzpatrick
Todd Garfield
Marc Lymann
Peris Lehmann
Alissa Redwanoski
Lindsey Bell

Chapter Feedback

If you have any questions, suggestions, comments, or concerns please reach out to **communications@phillyiia.org**

Stay informed about upcoming events by following the Philadelphia IIA Chapter on social media

https://www.linkedin.com/company/institute-of- internal-auditors-Philadelphia-chapter

Spring Conference Planning Committee

- Jamie OHare
- Brian Care
- Emilie Boyer
- Marnell Kleynhans
- James Virgilio
- Jimmy Loftus
- Martha Akhurst
- Jason Childress
- Maeve Raak - Graphics
- Laurie Riggs - NASBA Review

Freedom Pass Bundles

Save up to 30% at our events!

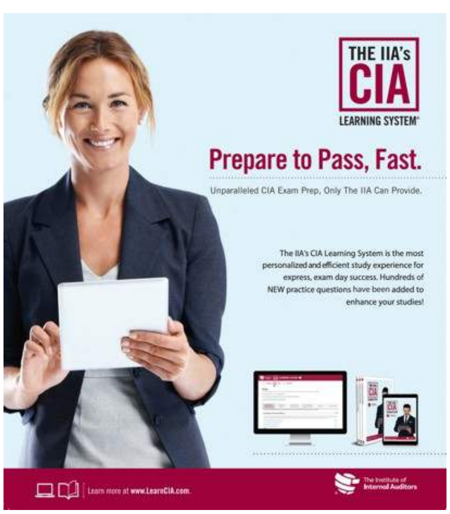
Bundle Size	Cost	Cost Per CPE	Savings %
40 CPE Credits	$1,638	$40.95	10%
80 CPE Credits	$3,094	$38.68	15%
160 CPE Credits	$5,824	$36.40	20%
320 CPE Credits	$10,920	$34.13	25%
640 CPE Credits	$20,384	$31.85	30%

The Institute of
Internal Auditors
Philadelphia

For further details, please reach out to ***programs@phillyiia.org***

Additional Freedom Pass Details:

- Freedom Pass credits generally translate to CPE hours for each event, unless otherwise stated (i.e., 5 people attending an 8 CPE seminar is 40 Freedom Pass Credits)
- Freedom pass credits expire 18 months from date of purchase
- Every Quarter, a statement providing the balance of used and purchased Freedom Pass credits will be provided to each account holder
- Freedom Pass bundles must be purchased by a member of the Philadelphia Chapter of the IIA
- Most programs offered by the Philadelphia Chapter of the IIA are eligible to be purchased using Freedom Pass credits



For further CIA information please visit: https://www.learncia.com