

**Vermont Secretary of State  
Office of Professional Regulation  
BOARD OF ACCOUNTANCY  
Location: 89 Main Street, 3<sup>rd</sup> Floor, Montpelier, VT 05602**

**Approved Minutes**

**June 23, 2015**

**Members present:** Joshua Partlow, Thomas Shortle, Steve Love, John Borch and Danny Coane

**Staff present:** Aprille Morrison, Gabriel Gilman and Peter Comart

1. 9:05 a.m. Called to order
2. **Approval of the Minutes of the May 26, 2015 meeting.** Mr. Shortle made a motion to approve the minutes with a correction to 5(b). Mr. Borch seconded the motion. Motion passed.
3. **Reports/Follow-up cases.** Case Managers Report by Carla Preston

Ms. Preston informed the Board they currently have nineteen (19) cases. Ten (10) were closed at today's meeting, six (6) are in the status awaiting response one (1) is pending charges, one (1) has had charges filed and one (1) is under investigation.

Report of Concluded Investigation 2014-599 and 2014-600. Mr. Shortle made a motion to accept the report as presented. Mr. Borch seconded the motion. Motion passed. Mr. Love did not participate in the vote as he was the Investigative Team Member.

Report of Concluded Investigation 2014-634 and 2014-684. Mr. Love made a motion to accept the report as presented. Mr. Borch seconded the motion. Motion passed. Mr. Shortle did not participate in the vote as he was the Investigative Team Member.

Report of Concluded Investigation 2014-674. Mr. Shortle made a motion to accept the report as presented. Mr. Borch seconded the motion. Motion passed. Mr. Partlow did not participate in the vote as he was the Investigative Team Member.

Report of Concluded Investigation 2014-677. Mr. Shortle made a motion to accept the report as presented. Mr. Borch seconded the motion. Motion passed. Mr. Partlow did not participate in the vote as he was the Investigative Team Member.

Report of Concluded Investigation 2014-678. Mr. Shortle made a motion to accept the report as presented. Mr. Borch seconded the motion. Motion passed. Mr. Partlow did not participate in the vote as he was the Investigative Team Member.

Report of Concluded Investigation 2014-680. Mr. Shortle made a motion to accept the report as presented. Mr. Borch seconded the motion. Motion passed. Mr. Partlow did not participate in the vote as he was the Investigative Team Member.

Report of Concluded Investigation 2014-681. Mr. Shortle made a motion to accept the report as presented. Mr. Borch seconded the motion. Motion passed. Mr. Partlow did not participate in the vote as he was the Investigative Team Member.

Report of Concluded Investigation 2014-683. Mr. Shortle made a motion to accept the report as presented. Mr. Borch seconded the motion. Motion passed. Mr. Partlow did not participate in the vote as he was the Investigative Team Member.

**4. Hearings/Stipulations/Concluded Investigations: None**

**5. Correspondence/Discussion items**

a. **Renewals – updates and changes.** Mr. Gilman spoke to the Board regarding the changes that were made mid-renewal regarding the continuing education grid and questions. The grid was removed as there were several issues licensees were having with entering their continuing education information. Instead of licensees entering each course into the grid they now have the ability to upload a listing of their education or copies of the continuing education certificates of completion. While this is not how the Office wishes to move forward with online renewal, it is a temporary fix. Mr. Gilman also informed the Board members that the Office is looking into either switching to a new licensing system or seriously upgrading the current one used. Mr. Gilman will circulate the request for proposal the office is currently working on to the Board members to see if there are any additions that should be added. The Board members also wanted to make sure that the Office audits the licensees from the previous renewal period that had deficiencies to make sure reporting of previous courses was not duplicated.

**6. Licensing – Review the following applications for licensure**

Mr. Shortle made a motion to approve the following applicants for licensure. Mr. Borch seconded the motion. Motion passed.

Xiamoing Ma

Stephen Hart

Lei Liu

The Board requested Ms. Morrison follow up with the following applications:

Robert Webber

**7. Other Board Business:**

Mr. Borch will be attending the NASBA regional meeting this week. Mr. Partlow pointed out several up and coming changes that will be reviewed at this meeting to members present.

**8. Adjourn.** There being no further business to attend to, the meeting adjourned at 10:42 am.

**Next Meeting: July 28, 2015**