

**Vermont Secretary of State
Office of Professional Regulation
BOARD OF ACCOUNTANCY**

Location: Vermont College Campus at Schulmaier Hall, 32 College Street, Montpelier, VT 05602

Minutes

April 23, 2013

Members present: Lee M. Spivey, Joshua Partlow, John Borch, and Jennifer Corey **Staff present:** Peter Comart and Judith Griffen **Members absent:** Thomas Shortle

- 1. Called to order at 8:59 a.m.**
- 2. Approved January 22, 2013 minutes.**
- 3. Hearings/Stipulations/Concluded Investigations – None**
- 4. Reports/Follow-up cases – None**
- 5. Licensing – Review the following applications for licensure**

Karri L. Root CPA LLC – Firm- approved
Complete Write-Up Services – Firm - approved
Hein Associates LLP – Firm – approved
John McCluskey – Reinstatement - approved
Steve Chevalier - Reinstatement - approved
John Shafto – Reinstatement - approved

Frank Policastro – Examination - approved
Joseph Cecere – Examination - approved
Hartley Hartman – Examination - approved
Robert Kersey – Examination - approved
April Colman– Examination – approved
Julia Son – Examination - approved
Naureen Wysocki – Examination - approved
Michael Deyoe – Examination - approved
Jeffrey Biesadecki – Examination - approved
Alexandra Doja – Examination - approved

Vass Management PC – Firm – needs additional information
Ng Carmen – Examination – needs additional information

6. Correspondence/Discussion items

- a. Emails regarding Peer Review from Daniel Dustin and Suzanne Jolicoeur were discussed and the Board feels that some changes are needed in the rules. Colin will start the process.
- b. Emails regarding CPE and requirements from David Carr, Stacey Grooms and Betty Hintch were discussed. Judith will respond to these and explain that the Board does not pre-approve education.
- c. Emails regarding Rule Changes from Daniel Snider and David Grippin and Changhoon Sung were discussed.

- d. Email from John Borch regarding the hours and experience and the ethics course was discussed and the Board said that the “Ethics for Accountants” course is just that. Any Ethics course that specifically deals with accountancy and the job that each licensee is doing should be fine. All courses will be reviewed when we do the audits.
- e. Email regarding CPA Ethics research from Mariana Booth was discussed and this information can be found in the annual report and in the statutes and rules.
- f. Social Security Numbers on applications with Peter Comart was discussed and will be tabled for a future discussion.
- g. Letter from Brentni Henderson-King regarding Evaluation Service was discussed but it was not clear to the Board exactly what they are asking. Peter will respond and try to get more information on this before an answer can be given.
- h. Email from Benjamin Staszewski regarding spread sheet was discussed this is more information that can be found in the annual reports, statutes and rules.

7 Other Board Business

Signing of Certificates

8. Adjourned at 1:48 p.m.