

**Vermont Secretary of State
Office of Professional Regulation
BOARD OF ACCOUNTANCY
MINUTES
April 26, 2011**

1. The meeting was called to order at 9:05 am.

Members present: Lee M. Spivey, CPA, Chairperson; Joshua Partlow, CPA; Thomas Shortle, CPA; Pam Douglass, Consultant

Members absent: John Borch, CPA; Jennifer Corey, Public Member

OPR Staff present: Aprille Morrison, Administrative Assistants; Peter Comart, Unit Administrator and Colin Benjamin, Board Attorney

2. The Chair called for approval of the Minutes of the January 25, 2011. There was an update of adding the language “and granted conditional approval pending receipt of deficient items” to the applications section of the minutes. The motion to approve pending changes was made by Mr. Partlow and seconded by Mr. Shortle. Motion passed unanimously.

3. Hearings/Stipulations

4. Reports/Follow-up cases

a. Case Managers Report by Carla Preston – We have twelve (12) pending cases

5. Applications

A motion was made by Mr. Shortle and seconded, by Mr. Partlow, to approve the following applicants for licensure or reinstatement based on their completed applications. The motion passed unanimously.

Gelman, Rosenberg & Freedman – Firm	Matthew Rose – Examination
Seok Joong Lee – Examination	T. Michael Vasil – Examination
Emily Bridge – Examination	Travis Drake – Examination
Lan Gordon – Examination	Marshall Blair – Examination
Joseph Pieksza – Endorsement	Sarah Belliveau – Reinstatement
Samantha Jackson – Examination	Doina Gidilica – Examination
Matthew Lyman – Examination	William Storey – Score Transfer/Exam
Bridgette Boucha – Score Transfer/Exam	William Eber – Endorsement
Joan Jorczak – Reinstatement	Eyal Seinfeld – Reinstatement

The Board reviewed the applications listed below at the January 25, 2011 meeting and granted conditional approval pending the receipt of deficient items. The deficient items were received for the below applicant and licensure was granted for the below individuals.

William Sullivan – Reinstatement
Seokjoong Lee – Examination

Jo-Anne Precourt – Examination

The Board reviewed the applications listed below, but was not able to approve them as submitted. Applicant(s) will be notified of the Board's findings.

Dever Accounting Services PC – Firm – need articles to state at least 50% stock ownership will be held by licensed individuals

Burlington Valuations PLC – Firm - need articles to state at least 50% stock ownership will be held by licensed individuals

Ashland Partners & Co. – Firm - need articles to state at least 50% stock ownership will be held by licensed individuals

Mark Bryant – Reinstatement – CPE submitted was not completed within the two years preceding reinstatement request.

Hadi Ahmed – Score Transfer/Exam – need 8 hours of Ethics

Hairim Yoon – Examination – does not hold a BS degree, need more experience in non tax work

Michael Dalton – Examination – Board needs clarification on Mr. Dalton's request for licensure

6. **AICPA Correspondence** – The Board reviewed correspondence
7. **NASBA Correspondence** – The Board reviewed correspondence
8. **Correspondence** - The Board reviewed correspondence
9. **Other Board Business**
 - a. Signing of certificates

- b. The Board was given the current draft copy of the Firm mobility application and asked to review it. There were a few changes and suggestions. The updated application will be reviewed at the May Board meeting
- c. Peter asked the Board about having a Board retreat as there are several items currently under discussion that need to be reviewed. The Board has agreed and the staff will work to set up a date that works for everyone involved.

10. There being no further business, the meeting was adjourned at 1:32 pm.

Respectfully Submitted
Aprille Morrison
Administrative Assistant