

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

Approved Minutes

May 23, 2017

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

Member(s) absent: Thomas Shortle

Staff present: Gabriel Gilman, Carla Preston and Aprille Morrison

1. The Chair called the meeting to order at 9:02 am.
2. **Approval of the Minutes of the April 28, 2017 meeting.** Mr. Love made a motion to approve the minutes with one grammatical correction. Mr. Coane seconded the motion. Motion passed.

3. **Reports/Follow-up cases.** Case Managers Report by Carla Preston

Ms. Preston informed the Board they currently have eighteen (18) pending cases. One (1) is on hold, eight (8) are under investigation, three (3) are ready for Investigative Team meeting and six (6) are pending charges being filed.

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

5. **Correspondence/Discussion items**

Yi Zhang – Course Questions. Yi Zhang contacted the Board regarding a course that NASBA had rejected. The Board reviewed the course information submitted and will accept the course. Ms. Morrison will contact Yi Zhang and NASBA to notify them of the Board's approval.

Jay Chatha – CGA communication. The Board reviewed Mr. Chatha's e-mail and determined that it is up to NASBA to make the determination whether the candidate meets the qualifications and will need to take IQEX to obtain licensure in Vermont. Ms. Morrison will contact NASBA and Mr. Chatha.

CGMA Title Discussion. The Board held a conference call with Catherine Allen, NASBA NorthEast Regional Director regarding the recent exposure draft to modify the Uniform Accountancy Act regarding misleading titles for the use of certain management credentials including the CGMA title. The Board will wait to hear more from NASBA regarding the exposure draft and will decide whether to comment on the exposure draft following the Eastern Regional Meeting in June.

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

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

Melissa Vanara – Endorsement
Kathryn McGrath – Exam

Jinwoo Yu – Exam
Michael Bandler – Endorsement

Imran Makda – Endorsement

JHW & Associates, CPAs, PLLC – Firm Mowery & Schoenfeld, LLC – Firm
Judelson, Giordano & Siegel, CPA., PC - Firm

The following application was reviewed by the Board and additional documentation will be requested.

Mr. Ryan Peloquin – US Business Law course credits were not on transcripts. Ms. Morrison will contact Peloquin.

7. The next regularly scheduled meeting is scheduled for Tuesday, June 27, 2017. Mr. Love will not be in attendance.
8. **10:00 am - Administrative Rules Public Hearing.** The Board held a public hearing for the proposed draft of the administrative rules changes. No one attended the hearing in person or by phone. The Board will move forward in the Administrative Rules process with filing with the Legislative Committee.
9. **Adjourn.** Mr. Love made a motion to adjourn the meeting at 10:56 am. Mr. Coane seconded the motion. Motion passed.