

**Vermont Secretary of State  
Office of Professional Regulation  
BOARD OF ACCOUNTANCY  
MINUTES  
June 28, 2011**

**1. The meeting was called to order at 9:00 am.**

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

Members absent: John Borch, CPA

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

**2. The Chair called for approval of the Minutes of the May 24, 2011 meeting. The motion to approve was made by Mr. Shortle and seconded by Mr. Partlow. Motion passed unanimously.**

**3. Hearings/Stipulations**

- Report of Concluded Investigation: 2010-370 and 2010-449.
  - A motion was made by Mr. Shortle and seconded by Mr. Partlow to accept the report. The motion passed unanimously.
- Report of Concluded Investigation: 2009-553.
  - Chairman Spivey recused himself. A motion was made by Mr. Shortle and seconded by Ms. Corey to accept the report. The motion passed unanimously.

**4. Reports/Follow-up cases**

a. Case Managers Report by Carla Preston – We have ten (10) pending cases, three(3) were closed at today's Board meeting, four(4) are set for I-Team and three (3) are under investigation.

**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.

John Copoulos – Endorsement  
Sarah Hallock – Examination  
Bethany Bartlett – Examination  
Courtney Mackilligan – Examination  
Hadi Ahmed - Examination

Melissa Smith – Examination  
Judith Doyle – Examination  
Jessica Ingram – Examination  
Rene Dorton – Examination/Score Transfer

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.

Becker's Accounting & Tax Service, LLC – Need receipt of additional language

Michael Dalton – Examination – need proof of work experience

Hairim Yoon – Examination – Need a baccalaureate degree or equivalent. This must be stated on the FACS report.

Daniel Ko – Examination – FACS report must state education is equivalent to a baccalaureate degree. Need proof of supervisor's Chartered Accountant license from Australia

Mark Bryant – Reinstatement – need verification of the 80 hours of CPE completion. The CPE previously submitted is not within the two years immediately preceding the submission of the renewal

Robert Meyring – Reinstatement – need verification of completion of 80 hours of CPE. The information submitted only verifies 36 hours.

6. **AICPA Correspondence** – No correspondence for review
7. **NASBA Correspondence** – Newsletter reviewed. Aprille will make sure Ms. Corey is on the list for members to receive NASBA correspondence.
8. **Correspondence** - E-mail received from George Wyand regarding pre-approval of experience to take exam. The Board discussed and asked Aprille to respond.
9. **Other Board Business**
  - a. Signing of certificates
  - b. Aprille asked about procedures for the current renewal and how to proceed with peer reviews. The Board will be reviewing any status that says "pass with deficiencies" or the ones that fail.

- c. Mr. Spivey handed out a starter list for discussion topics at the Board Retreat on August 23<sup>rd</sup>. Peter will work on finding a location in the Middlebury area to have the retreat.

**10.** There being no further business, the meeting was adjourned at 12:00 pm.

Respectfully Submitted  
Aprille Morrison  
Administrative Assistant