

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

Minutes

April 21, 2014

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

Staff present: Judith Griffen and Colin Benjamin

- 1. Called to order at 9:10 a.m.**
- 2. Approved the Minutes of the January 28, 2014 meeting.**
- 3. Reports/Follow-up cases**
 - a. Case Managers Report by Carla Preston was given and there are 30 open cases at this time. Six are new and in the intake process, four are set for an I-team meeting, eleven are under investigation and two will be set for hearing.
- 4. Correspondence/Discussion items**
 - a. NASBA success letter was reviewed and the letter is approved pending the update of the phone number.
 - b. CPE audit service review – Update from Peter will be postponed to next meeting.
 - c. Josh and Colin explained to the board that the rules will be effective June 1st.
 - d. Review of education for NASBA – NA Li – The Board needs more information in order to make a final decision.
 - e. Review of education for NASBA – Xun Cai - The Board needs more information in order to make a final decision.
 - f. Review of education for NASBA – Ashley Pilon – The distance education submitted is approved.
 - g. Email from Ally Waqar request for clarification – If there is an agreement with AICPA than the Board will approve.
- 5. Hearings/Stipulations/Concluded Investigations –**
 - a. 10:00 a.m. – 2012-742 and 743 – Dorothea Kelly – Hearing – was continued until May 27, 2014.
- 6. Licensing – Review the following applications for licensure**

Qishen Chen - examination – approved
Zia Khan – examination – approved
Amanda Partlow – examination – approved
Tuo Zhao – examination – needs 4160 in hours in experience or 2 more credits to make 150 in education
Kenisha Lewis – examination – approved
Ashley Young – examination – approved
Erik Andreas – examination – approved
Shelly Bondy – examination – Need bachelor's degree
Sungchan Ahn – examination – approved
Stephanie Breault – examination – approved
Megan Roberto – examination – approved
Matthew Dodson – examination – approved
Bryanne Nisbet – examination – approved

Lisa Roy – examination – approved
Lori Marcy – examination – approved
Aaron Ciullo – examination – approved
Rose Maragh – examination – needs bachelor’s degree
Kristi Raymond – examination – approved
Jing Qiu – examination – approved
Christine Morrison – examination – approved

Min Hong – reinstatement – approved
Caitlin Kelly – reinstatement – approved
Mandy Long – reinstatement – approved
James Nash – endorsement– approved

Clark, Schaefer, Hackett & Co – Firm – approved
SaxBST LLP – Firm – approved
Hibler & Woodburn Tax Consulting – Firm – approved

7 Other Board Business

- a. Signing of Certificates
- b. Vermont Society Meeting – Thursday May 8, 2014 – Steve Love will attend.

8. FYI

- a. 2014 Board Member and Advisor Training, Wednesday, January 15, 2014

9. Adjourn

Next Meeting: May 27, 2014