

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

Approved Minutes

April 28, 2017

Members present: Joshua Partlow, Steve Love, Thomas Shortle and Danny Coane

Member(s) absent: John Borch

Staff present: Gabriel Gilman, Carla Preston, Rachel Green and Aprille Morrison

1. The Chair called the meeting to order at 9:35 am.
2. **Approval of the Minutes of the January 24, 2017 meeting.** Mr. Coane made a motion to approve the minutes as presented. Mr. Love seconded the motion. Motion passed.
3. **Reports/Follow-up cases.** Case Managers Report by Carla Preston

Ms. Preston informed the Board they currently have twenty (20) pending cases. One (1) is on hold, two (2) the Investigative Team has recommended closing, 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**

Discipline Questions. Ms. Preston and Ms. Green spoke with the Board regarding creating a process to review out-of-state discipline cases. The Board will work on a process to assist Ms. Green with screening.

Communication from Thomas O'Brien regarding "Retired" status. The Board spoke to Mr. Benjamin regarding a retired status and what that would look like moving forward. Mr. Benjamin informed members that it has been requested by several Boards and is something they will try to look at for the next OPR bill. Currently Vermont only has Inactive status which the officer interprets to mean that one is no longer working in that field and has elected to let their license expire.

Questions from Shimeka Buchanan with NASBA. The Board reviewed the questions Ms. Buchanan submitted on behalf of the NASBA examination service. As the Board does not review an application until it is complete any educational situations that are outside of a standard college degree are reviewed on a case by case basis. The Board does not give blanket approval for educational situations. Ms. Morrison will respond to Ms. Buchanan.

NASBA Eastern Regional Meeting. The meeting will be held from June 27-29, 2017 in Newport, Rhode Island. Mr. Love will be attending and should a NASBA scholarship become available the Mr. Borch will also attend.

NASBA Quarterly Regional Conference Call. Mr. Partlow informed members present of the topics that

were covered in the conference call such as CPE monitor, an updated version of the CPE Model Rules and discussion of the CGMA designation.

6. Licensing – Review the following applications for licensure

Mr. Shortle made a motion to approve the following applicants for licensure. Mr. Love seconded the motion. Motion passed.

Qianru Zhao – Exam	Yang Zhang Hillman – Exam	Benjamin Medor – Exam
Raina Tripp – Exam	Scott Fleming – Exam	Bin Yang – Exam
Nicole Vanderstorm – Exam	Jenelle Gallipo – Exam	Michael Richter – Score Transfer
Amanda O'Donnell – Exam	Kevin Prindle – Endorsement	Stephen Merz – Endorsement
Roberta Jackson – Endorsement	Phillip Hyatt – Endorsement	

Plante & Moran, PLLC – Firm	Arnett Carbis Toothman LLP – Firm
KCoe Isom, LLP - Firm	

The following applications were reviewed by the Board and were approved pending receipt of additional documentation.

Jinwoo Yu – Transcripts on record only show 140 hours. Additional education is needed to meet the 150 credit requirement.

Michael Bandler – Ethics certificate provided does not meet Vermont requirements for initial licensure.

Imran Makda – Ethics certificate provided does not meet Vermont requirements for initial licensure.

7. The next regularly scheduled meeting is scheduled for Tuesday, May 23, 2017.

8. Adjourn. Mr. Love made a motion to adjourn the meeting at 11:02 am. Mr. Coane seconded the motion. Motion passed.