

**Vermont Secretary of State  
Office of Professional Regulation  
BOARD OF ACCOUNTANCY  
MINUTES  
November 22, 2011**

**1. The meeting was called to order at 9:04 am.**

Members present: Lee M. Spivey, CPA, Chairperson; Thomas Shortle, CPA; Joshua Partlow, CPA; and John Borch, CPA

Members absent: Jennifer Corey

OPR Staff present: Aprille Morrison, Administrative Assistant and Peter Comart, Unit Administrator

**2. The Chair called for approval of the Minutes of the October 18, 2011 meeting. The motion to approve was made by Mr. Shortle and seconded by Mr. Partlow. Motion passed unanimously.**

**3. Hearings/Stipulations/Concluded Reports - None**

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

We have six (6) pending cases.

**5. Applications**

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

Carolyn Stevens CPA - Firm  
Celia Asbell  
Adam Sharrow

Jennifer Kron  
San Romano  
Ming Lou

Daniel Crouse  
Ryan Bradford

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.

Christopher Smith – Need clarification if Taxation Class and Business Law Class covered U.S. Taxation and Business law as required by Administrative Rule 5.3

6. **AICPA Correspondence** – No correspondence for review

7. **NASBA Correspondence** – No correspondence for review

8. **Correspondence** -

E-Mail from Vanessa Fortune – Denial of taking exam – The information provided to the Board appears to meet the requirements. Aprille will reach out to Kyle Barrier, the exam contact through NASBA, to see if this issue can be resolved. Chairman Spivey will respond to Ms. Fortune.

Letter from Allen Webster – CPE – The Board reviewed Mr. Webster’s request to use a CLE education seminar designed for Lawyers as part of the qualifications for his accountancy CPE. Chairman Spivey will respond to Mr. Webster.

Mary Huettner – College of St. Joseph – Mrs. Huettner requested the Board to review the list of additional courses being provided at College of St. Joseph’s to make sure they will meet the July 2014 requirements for additional business courses. Mr. Spivey will respond to Mrs. Huettner.

9. **Other Board Business**

Administrative Rules – Discussion – Aprille presented the Board with the boiler plate language for Peer Reviews as well as a copy of the draft Rules to see where the Board would like to add in the additional language. Aprille will insert the language and forward this to the Board for review.

Report on Annual Meeting – Mr. Borch and Chairman Spivey attended the Annual Meeting for NASBA and shared with the Board their findings.

10. There being no further business Mr. Shortle made a motion to adjourn, seconded by Mr. Partlow, the motion passed unanimously. The meeting was adjourned at 10:58 am.

Respectfully Submitted  
Aprille Morrison  
Administrative Assistant