

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

**Approved Minutes**

**January 27, 2015**

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

**Staff present:** Aprille Morrison, Gabriel Gilman and Peter Comart

1. 9:04 a.m. Called to order
2. **Approval of the Minutes of the December 23, 2014 meeting.** Mr. Shortle made a motion to approve the minutes as corrected. 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 three (23) cases. Three (3) are pending hearing, two (2) are ready for closing, three (3) are currently under investigation, fourteen (14) are set for Investigative Team meeting and one (1) is pending charges being filed. Ms. Preston informed the Board that with the staff changes going on it could be the beginning of March before Investigative Team meetings could be held.

4. **Hearings/Stipulations/Concluded Investigations:**

Hearing: Laurie Putnam, docket # 2014-160. The Board heard testimony from both the State and the Respondent. The participating members went into deliberative session from 10:14 am to 10:40 am and informed Ms. Putnam that they would send her their decision in writing. Mr. Borch did not participate in the hearing as he was the Investigative Team member.

Stipulation and Consent Order in the matter of Patricia Blackmore, docket # 2013-763. Mr. Shortle made a motion to accept the order as presented. Mr. Love seconded the motion. Mr. Borch did not participate in the vote as he was the Investigative Team member. Motion passed.

Report of Concluded Investigation in the matter of 2014-524 and 214-525. Mr. Shortle made a motion to accept the order as presented. Mr. Coane seconded the motion. Mr. Partlow recused from discussion as he was the Investigative Team member. Motion passed.

5. **Correspondence/Discussion items**

a. **OPR Update.** Colin Benjamin approached the Board regarding all disciplinary matters being heard by an administrative law officer instead of the Board. Mr. Shortle made a motion requesting the Office of Professional Regulation explore using an administrative law officer according to VSA 129(f) in all disciplinary matters. Mr. Coane seconded the motion. Motion passed.

b. **NASBA – Data request for AICPA candidates.** The Board approved of NASBA contacting CPA examination applicants for surveys. Mr. Comart will respond to NASBA and complete the required documentation authorizing this.

c. **New applicant guide and “new applicant” button for website.** Mr. Comart requested the Board review the New Applicant Guide that is currently listed on the website and let him know prior to the April meeting about updates or changes that should be made. Mr. Comart also requested the Board’s approval to add an additional information guide to the Vermont Board of Accountancy’s webpage tailored to new applicants. The Board approved of this change.

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

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

James Holmes

Nicolae Lungu

Eileen Mallowney

Hsiang-Hao Hsu

**7. Adjourn.** With there being no additional business to attend to the meeting adjourned at 11:00 am.

**Next Meeting: April 20, 2015**