

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

Approved Minutes

July 25, 2017

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

Staff present: Gabriel Gilman, Carla Preston and Aprille Morrison

1. The Chair called the meeting to order at 9:05 am.
2. **Approval of the Minutes of the June 27, 2017 meeting.** Mr. Coane made a motion to approve the minutes with one amendment. Mr. Shortle seconded the motion. Motion passed. Mr. Love abstained from voting as he was not in attendance at the May meeting.

3. **Reports/Follow-up cases.** Case Managers Report by Carla Preston

Ms. Preston informed the Board they currently have eighteen (19) pending cases. One (1) is on hold, nine (9) are under investigation, one (1) is ready for Investigative Team meeting and eight (8) are pending charges being filed.

4. **Hearings/Stipulations/Concluded Investigations:** None

5. **Correspondence/Discussion items**

Administrative Rules Update. Mr. Gilman informed members present that it will be approximately a four month window until the proposed Administrative Rules can be adopted. This would put implementation in the November/December timeframe.

NASBA Regional Meeting. Mr. Love attended the NASBA regional meeting in June and reported to the Board on the topics of discussion.

CGMA Titles. Catherine Allen contacted the Board requesting notification of where the Board stands on the UAA Committee's proposal to amend the UAA to include language that would, under certain limitations, permit the unlicensed use of management accountant titles, including, CGMA. Mr. Partlow held a discussion with the Board and will respond to Ms. Allen.

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

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

Evan Posner – Exam Yufei Li – Exam Jaesang Kim – Exam

Christopher Kessler – Endorsement Roberts & Greene, PLLC – Firm

The following applications were approved pending receipt of additional documentation:

Dmitri Bradley – Score Transfer – need additional transcripts showing 68 credits completed from Schenectady County Community College that were accepted toward bachelor degree from University at

Albany.

Garvey, Steele & Company LLP – Firm – need a copy of the final peer review letter of acceptance from CTCPA.

The application by examination for Chi Hung Wong needs additional explanations regarding the grading system for the University of York and explanation on an answer for a mandatory fitness question. Ms. Morrison will reach out to the applicant.

7. The next regularly scheduled meeting is scheduled for Wednesday, September 6, 2017.
8. **Adjourn.** There being no additional business the meeting adjourned at 10:20 am.