

**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**

**September 6, 2017**

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

**Member(s) absent:** Thomas Shortle

**Staff present:** Aprille Morrison and Carla Preston, Case Manager

1. The Chair called the meeting to order at 9:05 am.
2. **Approval of the Minutes of the July 25, 2017 meeting.** Mr. Coane made a motion to approve the minutes as presented. Mr. Borch 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) pending cases. One (1) is on hold, ten (10) are under investigation, three (3) are ready for Investigative Team meeting, one (1) is ready for closing and eight (8) are pending charges being filed.
4. **Hearings/Stipulations/Concluded Investigations:** None
5. **Correspondence/Discussion items**

Review of Draft Response for CGMA designation. The Board members present reviewed a response Mr. Partlow drafted regarding the Uniform Accountancy Act Committee's proposal to amend Section 14 of the Uniform Accountancy Act (UAA) to allow non-CPAs to assume or use management accounting designations with certain caveats and restrictions. Mr. Love made a motion to approve the draft letter as presented and have Mr. Partlow sign on behalf of the Vermont Board. Mr. Borch seconded the motion. Motion passed. Ms. Morrison will forward the signed letter to NASBA and AICPA.

NASBA National Meeting. Mr. Partlow mentioned to members present that the NASBA National meeting will be held in New York City, NY October 29 through November 1. He will send an e-mail around to Board members following the meeting to see if anyone else has any interest in attending. Once the attending member is decided they will contact Ms. Morrison for travel info.

Education Requirement Question. Mr. Logan Price contacted the Board requesting acknowledgement as to whether a few courses he wanted to take to meet examination requirements, were acceptable. The Board reviewed the information provided and Ms. Morrison will respond to Mr. Price.

University of Maryland. The Board received a packet of information from the University of Maryland regarding an online accounting program they would like to implement. As the Board does not approve institutional education programs, the University will need to contact NASBA for accreditation. Ms. Morrison will respond.

Exam Credit Extension Requests. As there was a delayed score release from the CPA examination services, the Board considered credit extension requests for the following applicants: Bethany Spates, Andrew Manor and Eeseul Kim. The Board agreed to allow one additional testing window for each of the previously mentioned applicants. Ms. Morrison will contact the applicants and the examination service.

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

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

Remi Omisore	Zhan Shu	Christian Rogers	Sean Walker
James Piotrowski	Keith Novak	Robert O'Neil	William Early Jr.
Monica Montero	Jason Ostroski	Michael Guyder	Daniel Steinhart
Eric Johnson	Chihung Wong		

The following application was approved pending receipt of additional documentation:

Jennifer Dean – Endorsement – Proof of ethics completion provided is not acceptable for initial applicants for Vermont licensure. The ethics must be based in the AICPA code of conduct.

The application by examination for Suet Ki Bernice Sun needs another education evaluation. The additional information provided by the applicant is not included in the foreign educational evaluation previously presented. Ms. Morrison will respond to the applicant.

- 7.** The next regularly scheduled meeting is scheduled for Tuesday, October 24, 2017.
- 8. Adjourn.** There being no additional business the meeting adjourned at 10:44 am.