

**Agenda for the September 21, 2021
Meeting of the State Board of Accountancy**



**Bureau of Professional and Occupational Affairs
Pennsylvania State Board of Accountancy**

Agenda for September 21, 2021

Time

10:30 A.M. Public Session

Location

To comply with social distancing guidelines, Board meetings are being held via Cisco WebEx. This board meeting will be recorded for purposes of completing the required minutes. Your voluntary participation in the meeting constitutes consent to be recorded.

Event address for attendees: Please use Google Chrome to access the event.

<https://pados.webex.com/pados/onstage/g.php?MTID=e24a15173248592f98f2015f5e0154480>

Event password: stateboard

To join by phone:

Phone number: +1-408-418-9388

Access code: 173 487 1228

If the meeting displays, "Test session in progress", the Board is in a private executive session. They will return to the public session when finished.

Board Members

*Keri A. Ellis, CPA, Chair
K. Kalonji Johnson, Commissioner of
Professional and Occupational Affairs
Monique M. Ericson, CPA, Office of Attorney General
Mary Jensik, CPA
Paul J. Kelly, III, CPA
Charles O'Brien, CPA
Michael D. Ocker, CPA
Sheri L. Risler, CPA, Vice Chair
Michael P. Rollage, CPA
David Stonesifer, CPA
Public Member, Vacant*

Board Counsel

Ronald Rouse, Esquire

Board Prosecution Liaison

Angela Solomon, Esquire

Board Administrator

Amanda Li

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MEETING CALL TO ORDER

APPROVAL OF MINUTES

1. July 20, 2021 State Board of Accountancy Draft Meeting Minutes

CASE STATUS REPORT

REPORT OF PROSECUTORIAL DIVISION

REPORT OF BOARD COUNSEL

Matters for Deliberation (Executive Session)

2. In the Matter of the Petition for Reinstatement of William McKernan, III, Case # 19-55-008978

Other (Executive Session)

3. BPOA v. Steven Ganley, Case # 19-55-018021
4. Petition for Reinstatement of Howard Drossner, Case # 21-55-006792

Regulatory Discussion

5. Regulation 16A-5516 (Competence to supervise attest services)
6. Regulation 16A-5517 (Licensure by endorsement)
7. Regulation 16A-5518 (Continuous testing of the CPA Exam)

REPORT OF REGULATORY COUNSEL

REPORT OF BOARD CHAIRMAN

8. Gift Ban Policy
9. Sunshine Act

REPORT OF COMMISSIONER

REPORT OF BOARD ADMINISTRATOR

REPORT OF COMMITTEES

Good Moral Character (Executive Session)

10. Prather

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REVIEW OF PROGRAM SPONSOR APPLICATIONS (Executive Session)

- 11. J Martin and Associates LLC - Ericson
- 12. Compass Estate Planning & Elder Law – Ericson
- 13. Siana Carr O'Connor & Lynam LLP – O'Brien

REVIEW OF EXPERIENCE QUALIFICATIONS FOR CPA CERTIFICATION

REVIEW OF REQUESTS

CPE Waiver (Executive Session)

- 14. Barrios - Waiver of 20 hours in 2020
- 15. Dreese - Waiver of 20 hours CPE in 2020
- 16. Sheaffer - Waiver of 20 Hours CPE in 2020

Extension of Peer Review (Executive Session)

- 17. Butrica
- 18. Fola & Associates PC

REVIEW OF CPA EXAMINATION FILES

CORRESPONDENCE

- 19. NASBA Performance Statistics for 2nd Quarter 2021
- 20. Quarterly Candidate Care for 2nd Quarter 2021

MISCELLANEOUS

Next Meeting Dates

- 21. 2021 Board Meeting Dates
- 22. 2022 Board Meeting Dates

ADJOURNMENT