

**Connecticut State Board of Accountancy**  
**Meeting Agenda**  
**Thursday, February 4, 2016 – 10:00 A.M.**  
Second Floor Conference Room  
30 Trinity St., Hartford, CT 06106  
860-509-6179  
[sboa@ct.gov](mailto:sboa@ct.gov)

**OFFICE AND BOARD OPERATIONS AND ADMINISTRATION**

1. **Action required** – Approve Minutes of the January 7, 2016 Board Meeting.

**INFORMATION REPORTS**

2. Administrative Updates
  - a. Budget – Blanche Tucker Reeves, Fiscal Administrative Manager
  - b. Wi-Fi access
  - c. Renewals
  - d. Legislation 2016: Commission and Contingency Fees, Mandatory Online Renewal, Non-Credential Commercial Tax Preparation Services
  - e. Peer Review Committee Report
  - f. May Retreat Planning Meeting – Location and Topics
  - g. Annual Newsletter Update
  - h. SBA-12 Committee Proposal – Experience Required by Registered/Licensed CPAs from all experience gained after February 2016
  - i. EXAM Testing Report 4<sup>th</sup> Quarter 2015
  - j. Meeting Dates Revised
  - k. Candidate Care 4<sup>th</sup> Quarter 2015

**PUBLIC COMMENT**

3. Opportunity for members of the public to address the board.

**EXAM AND LICENSING**

**OLD BUSINESS**

4. **Action required – Industry, Government, or Self Employed experience, and Other Applications**  
**Amy Brandstetter** – Initial CPA Certificate & Initial License, Industry Experience & Public.  
Ms. Marien made a motion to table the application pending completion of Page 2 of the SBA-11 form.  
**Chelsea Dugas** - Initial CPA Certificate & Initial License, Industry and Public Experience.  
Ms. Marien made a motion to table the application pending completion of Page 2 of the SBA-11 form.  
Mr. Niedermeyer recused himself.  
**Briggs Wealth Management, Inc.**- tabled at the January 4, 2016 meeting requesting additional information regarding the services provided by the firm.  
**Macconel & Dodd** - tabled at the January 4, 2016 meeting requesting additional information regarding the structure of the firm.

## **NEW BUSINESS**

5. **Action Required - Industry, Government, or Self Employed experience, and Other Applications**  
**Theodore Fatse** - Initial CPA Certificate & Initial License, Public and Industry Experience
  
6. **REVIEW FIRM PERMITS FOR APPROVAL- INITIAL APPLICATION & FIRM NAME CHANGE-** List Provided
  
7. **PCAOB** Inspection Reports Received – **Report Date** - January 13, 2016  
**Moore Stephens Lovelace, P.A.**  
**Whittlesey & Hadley, P.C.**
  
8. **EXAMINATION AND CPE EXTENSION** – None

## **OTHER BUSINESS**

9. Enforcement Cases – Enforcement Overview  
**2015-10** - Victor G. Hewitt vs. Michael Weinshel  
**2015-26** - Gavin & Sara Golbourn vs. Michael Weinshel  
**2015-44** - Connecticut State Board of Accountancy vs. Parker Tax Services, LLC  
**2014-10** – Derek J. Deleo vs. Anthony W. Cirone, Jr.  
**2015-75** – Connecticut State Board of Accountancy vs. Anthony Beatman  
**2015-91** – Connecticut State Board of Accountancy vs. Dipto Jaymin Shah

## **PUBLIC COMMENT**

10. Opportunity for members of the public to address the board.

**EXECUTIVE SESSION-**Personnel Issues – Sonia Asare and Deputy Spallone invited.

SBA-12 Subcommittee Meeting following the board meeting.

Next scheduled meeting: Thursday, March 3, 2016 -10:00 AM- 2nd Floor, 30 Trinity Street, Hartford, CT