

Connecticut State Board of Accountancy
Meeting Agenda
Tuesday, March 3, 2015 – 10:00 A.M.
Second Floor Conference Room
30 Trinity St., Hartford, CT 06106
860-509-6179
sboa@ct.gov

OFFICE AND BOARD OPERATIONS AND ADMINISTRATION

1. **Action required** – Approve Minutes of the February 3, 2015 and February 23, 2015 Special Board Meetings

INFORMATION REPORTS

1. **Governor's Proposed Budget** – Daniel J. Dustin, CPA, NASBA, Vice President, State Board Relations
2. **Administrative Updates**
Mutual Recognition Agreement- Update for Reciprocal Licensees
3. Elijah Watts Sells Awardee - CONNOLLY, MARK
4. Candidate Care October 1 – November 30, 2014
5. Newsletter Report
6. NASBA Call for Annual Accounting Education Research Grants Program
7. Invitation to Join Board of Examiners Call - AICPA
8. College Initiative Updates
9. Regulation & Legislative Updates:
 - a. Commission and Contingent Fees Subcommittee Report - Subcommittee

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**
 - a. **Felicia F. Seton**– request for waiver fee, tabled at February 3, 2015 board meeting

NEW BUSINESS

5. **Action Required - Industry, Government, or Self Employed experience, and Other Applications**
 - a. **Kathleen Matthews**– Initial CPA Certificate & Certificate Registration, Industry Experience
 - b. **Lisa Gorman**- Initial CPA Certificate & Certificate Registration, Industry Experience
 - c. **Rebecca Soltis**- Initial CPA Certificate & Initial license, Industry Experience
 - d. **Kristine Warhola**- Initial CPA Certificate & initial license, Industry Experience
 - e. **Kevin J. Walker** – Initial License CPA Certificate – Nonconforming Experience- experience not received under a supervising CPA

6. REVIEW FIRM PERMITS FOR APPROVAL

7. **PCAOB** Inspection Reports Received – member comment on review
- Review Report Dated **January 16, 2015 Grant Thornton, LLP
Li and Company, PC
Moss Adams, LLP**

 - Review Report Dated **February 6, 2015 Li & Company, PC**

EXAMINATION AND CPE EXTENSION

- A. Donald Cooper** - requesting waiver of late CPE fee
Donald J. Siclari - requesting an extension to complete CPE
Joseph A. Ableski - requesting an extension or a waiver for CPE
John Sherer - requesting extension to sit for audit section of CPA exam
Michael Zbar- additional letter for request of waiver of late fees which was denied at the February 3, 2015 board meeting.
Christine Refino-requesting waiver of late renewal fee

OTHER BUSINESS

8. Enforcement Cases
- a. **2011083-3713** - Lewis Clark vs. Zackin, Zimyeski, Sullivan, LLC
 - b. **2011011-3559** - David Halloway vs. Sean Patrick McNamee

PUBLIC COMMENT

Opportunity for members of the public to address the Board

Next scheduled meeting: Tuesday, April 7, 2015 -10:00 AM- 2nd Floor, 30 Trinity Street, Hartford, CT