

**Connecticut State Board of Accountancy**  
**Meeting Agenda**  
**Tuesday, May 5, 2015 – 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 April 7, 2015 Board Meeting

**INFORMATION REPORTS**

2. **Administrative Updates**
  - a. Mutual Recognition Agreement
  - b. AICPA Concept Statement Peer Review- Board Member Feedback
  - c. Legislative and Regulation Updates
  - d. College Credit for Exam Prep
  - e. NASBA Regional Conference – June 24-26
  - f. June Retreat Topics and Planning
  - g. CPE Audit

**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. **Christopher Millin**- Initial CPA Certificate & Initial License, Industry Experience  
Tabled at the April board meeting. Additional Information submitted.
  - b. **Kevin Walker** – Non-conforming experience – Will appear before the board.

**NEW BUSINESS**

5. **Action Required - Industry, Government, or Self Employed experience, and Other Applications**
  - a. **Agnieszka Dumansky** - Initial CPA Certificate & Certificate Registration, Industry Experience.
  - b. **Alaina Umbach** - Initial CPA Certificate & Certificate Registration, Industry Experience.
  - c. **Joseph Martino** – Reciprocal Certificate & Initial License, Public and Industry Experience
  - d. **Michael Foster Jr.** –Question 5 checked off on form SBA-11
  - e. **Cheri Mazza** – Non conforming experience, other experience dates are to old

**6. REVIEW FIRM PERMITS FOR APPROVAL**

7. **PCAOB Inspection Reports Received –April 21, 2015**

**Anchin Block & Anchin LLP**  
**Arthur F. Bell, Jr. & Associates, LLC**

## **EXAMINATION AND CPE EXTENSION**

**Louis Scerra**- Requesting for reimbursement of late fee for late license renewal

**Lauren Haberern** – Requesting credit for passing Audit, Attestation and Regulation and an extension to complete the exam until March 1, 2016.

## **OTHER BUSINESS**

### **8. Enforcement Cases**

**2014-62** – CT State Board of Accountancy v. James E. Neilsen

**2015-4** – Allen Syskowski v. William F. Epperson Associates, LLC

**2015-5** – Connecticut State Board of Accountancy v. Brett McGrath

**2012-103777** – Darla Henggeler v. James R. Levy

**2012-103773** – Mr. & Mrs. Wiland v. James R. Levy

**2012-3793** – Kerry Wiland v. James R. Levy

**2012-103778** – David & Mary Ann Niland v. James R. Levy

**2013-21** – Maria Notar v. James R. Levy

**2012009-3757** – Rock Dean Holland v. James R. Levy

## **PUBLIC COMMENT**

Opportunity for members of the public to address the Board

Next scheduled meeting: Tuesday, June 2, 2015 -10:00 A.M.- Marcum LLP, City Place II, 185 Asylum Street, Hartford, CT