

**Agenda for the September 19, 2024  
Meeting of the State Board of Accountancy**

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

**Agenda for September 19, 2024**

**Time**

Executive Session: 9:00 AM  
Public Session: 10:30 AM

**Location**

**In person**

Eaton Board Room  
2525 N. 7<sup>th</sup> Street  
Harrisburg, PA 17110

**Online via Microsoft Teams**

[Click here to join the Board of Accountancy meeting](#)

**Call In (audio only)**

1-267-332-8737  
Access code: 639 691 804#

**Board Members**

*Sheri L. Risler, CPA, Chair*  
*Arion Claggett, Acting Commissioner of*  
*Professional and Occupational Affairs*  
*Keri A. Ellis, CPA*  
*Monique M. Ericson, CPA, Office of Attorney General*  
*John J. Grater, CPA*  
*Benjamin Holland, CPA*  
*Charles O'Brien, CPA*  
*Michael D. Ocker, CPA, Vice-Chair*  
*John Petchel, Public Member*

**Board Counsel**

*Ronald K. Rouse, Esquire*

**Board Prosecution Liaison**

*Ashley P. Murphy, Esquire*

**Board Administrator**

*Miranda Murphy*

**Vacancies**

*Public Member, vacant*  
*Public Member, vacant*  
*CPA Member, vacant*  
*CPA Member, vacant*  
*CPA Member, vacant*  
*PA Member, vacant*

***This Board meeting will be recorded for purposes of completing the required minutes. Your voluntary participation in the meeting constitutes consent to be recorded.***

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**MEETING CALL TO ORDER**, Sheri L. Risler, CPA, Chair

**APPROVAL OF MINUTES**

1. April 19, 2024 State Board of Accountancy Draft Meeting Minutes
2. June 21, 2024 State Board of Accountancy Draft Meeting Minutes

**CASE STATUS REPORT**

**REPORT OF PROSECUTORIAL DIVISION**

**REPORT OF BOARD COUNSEL**, Ronald K. Rouse, Esq.

**Final Adjudication and Order**

3. BPOA v. John M. Cipriani and Cipriani & Associates LLC, Case No. 21-55-013602 and No. 23-55-011531 \*
4. BPOA v. John Tornese and ATM Affiliates, LLC, Case No. 22-55-004367 and 22-55-003443 \*
5. In the Matter of the Petition for Reinstatement to Probationary Status of the Certified Public Accountant License of George Thomas, Case No. 24-55-003628 \*

**Motion to Deem Facts Admitted and Enter Default**

6. BPOA v. Michael R. Bull, Case No. 23-55-002633 \*

**Regulations**

7. Regulatory Report

**Miscellaneous**

8. Election of Officers

**REPORT OF BOARD CHAIRMAN**, Sheri L. Risler, CPA

9. Sunshine Act
10. Gift Ban Policy

**REPORT OF COMMISSIONER**, Arion Claggett

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**REPORT OF BOARD ADMINISTRATOR, Miranda Murphy**

- 11. 2020-2021 CPE Audit Statistics
- 12. 2022-2023 CPE Audit Statistics

**REPORT OF COMMITTEES**

**REVIEW OF PROGRAM SPONSOR APPLICATIONS**

- 13. Strategy Dynamics Ltd. \*
- 14. EMC CPAs LLC \*
- 15. Guardian Peak Wealth Advisors of Raymond James \*

**REVIEW OF CPA EXAMINATION FILES**

**REVIEW OF REQUESTS**

**Requests for Extension of Time to Complete CPE – Approved, for Ratification**

- 16. Schichtel \*
- 17. Liu \*
- 18. Goldsmith \*
- 19. Krause \*

**Requests for Waiver of CPE Requirements – for Discussion**

- 20. McKinney \*
- 21. Nissley \*

**Requests for CPE Exception – for Discussion**

- 22. Schluth \*

**Requests for Extension of Examination Credits – Approved, for Ratification**

- 23. Torres \*

**Requests for Extension of Examination Credits – for Discussion**

- 24. Wilkinson \*

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**CORRESPONDENCE**

- 25. Foreign Credentials Service of America \*
- 26. NASBA Questions Regarding CPE Requirements \*

**MISCELLANEOUS**

- 27. NASBA 117<sup>th</sup> Annual Meeting, October 27-30, 2024, Orlando, Florida
- 28. CPE for Completion of Certifying Examinations
- 29. NASBA – Pennsylvania Q1 2024 Reports
- 30. NASBA – Pennsylvania Q2 2024 Reports
- 31. NASBA Candidate Care Report – Q2 2024
- 32. NASBA Enforcement Report – Q2 2024
- 33. NASBA Quarterly Communications – Q2 2024
- 34. NASBA – Proposed Bylaws
- 35. NASBA – “Experience, Learn and Earn” Update
- 36. NASBA – 2024 Exam Administration and Score Release Update
- 37. NASBA State Board Report
- 38. NASBA and AICPA – Proposed Additional Pathway to CPA Licensure
- 39. PICPA Update on NASBA-related Issues/Events

**Appointments**

- 40. 11:00 a.m. - Hearing on the Petition for Reinstatement of the Certified Public Accountant License of John M. Swirsding, Case No. 23-55-015071 \*

**Board Committees**

- 41. Board Committees

**Next Meeting Dates**

- 42. 2024 Board Meeting Dates
- 43. 2025 Board Meeting Dates
- 44. 2026 Board Meeting Dates

**ADJOURNMENT**

\* Indicates Item was Discussed in Executive Session

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**Next Meeting Date: November 19, 2024**

**2024 Board Meeting Dates:**

November 19<sup>th</sup>

**2025 Board Meeting Dates:**

January 15<sup>th</sup>

April 17<sup>th</sup>

May 21<sup>st</sup>

July 23<sup>rd</sup>

September 17<sup>th</sup>

November 19<sup>th</sup>

Board Telephone Number:	1-833-DOS-BPOA
Department of State Website:	<a href="http://www.dos.pa.gov">www.dos.pa.gov</a>
Board Website:	<a href="http://www.dos.pa.gov/account">www.dos.pa.gov/account</a>