

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

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 4th Quarter 2015
 - j. Meeting Dates Revised
 - k. Candidate Care 4th 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