

Connecticut State Board of Accountancy
Meeting Agenda
Friday, November 15, 2013 – 8:30 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 October 3, 2013 Board Meeting
2. CPE Audit Update
3. Meeting Dates for 2014
4. Statutory Revision Recommendation
5. ALD – Discipline
6. ALD – Discussion on Social Security Numbers and Date of Birth Requirements for all CPA's

EXAM AND LICENSING

7. **Action required – Industry, Government, or Self Employed experience, and Other Applications**
Hillel Adler- application for Initial CPA Certificate & Initial CPA License: Industry Accounting experience, tabled at the October 3, 2013 board meeting. Board state that experience was tabled due to the experience presented was not performed under the supervision of a CPA. CPA presented Arthur Federman did not work at Hebrew High School. (**Attending meeting**)
John Cunningham – Initial Certificate & Initial License: Resume and letter attached SBA-12 Experience, Verification form, no supervisor to sign off on experience. Denied at the June 24, 2013 Board meeting. Tabled at the September 13, 2013 Board meeting pending additional experience information provided by a CPA he has worked recently with. Question on if he has taken any current CPE. (Additional experience verification has been provided -McGladrey LLP)
Gary Farber – application for Initial CPA Certificate & registration; Industry Accounting experience, Tabled at the September 6, 2012 board meeting pending more check offs on experience. (Additional experience provided)
James Kelly – application for Initial Certificate and Certificate Registration; Industry Accounting experience
Stephen Lucas – application for Initial CPA Certificate & Initial CPA License; Industry Accounting experience, Section 7 has 2 questions checked off N/A on SBA-12 form.
Brian Masi – application for Initial CPA Certificate & Initial License; Industry Accounting experience Section 7 of experience verification form has no checked off on one of the questions.
Stephanie Sheldon – application for Initial Certificate and Initial License; Industry Accounting, and public accounting experience
Tess Wolff – application for Initial CPA Certificate & Initial CPA License; Industry Accounting experience.
8. **Review Firm permits for approval**

OTHER BUSINESS

9. Enforcement Cases
2011-3578 - Frederick, James P.
2013-25 - Valliere, Eric S.
2011005-3553 - Borsari, Paula V.
2010080-3430 - Brush, Charles Jr.
2013-39 - Robin Dunn
2013-40 - Musante, Stephen P.

PUBLIC COMMENT

Opportunity for members of the public to address the Board

EXECUTIVE SESSION

Appointment of Board Members

Next scheduled meeting:

- Thursday, December 5, 2013 -8:30 AM- 2nd Floor, 30 Trinity Street, Hartford, CT

Subcommittees will meet after the regular meeting.

Enforcement Subcommittee

Martha Triplett

Michael Weinshel

James S. Ciarcia

Phil J. DeCaprio

Sonia Asare