

Halsey Beshears, Secretary

Ron DeSantis, Governor

July 12, 2019  
 Board of Accountancy  
 Department of Business and Professional Regulations  
 400 West Robinson Street  
 Orlando, FL 32801

Notice

Friday, July 12, 2019

9:00 a.m. Call to Order	Tracy Keegan, Chair
Pledge of Allegiance	
Establishment of Quorum	Angela Francis, (Acting) Director
Introduction of Board	

**1. Approved Board Minutes**

A. May 17, 2019	Page 5
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**2. OGC Final Action:**

**Settlements**

A. De La O, Norma Brito	2018-040207 [DD]	Page 15
B. Fisher, Carl Frank III	2018-031212 [DD/DS]	Page 93
C. Hastings, David C	2018-041464 [DD/DS]	Page 233
D. Swart, Harold J	2017-056307 [MR/DS/JS]	Page 342

**Hearing Involving No Disputed Issues of Material Fact**

E. Perkins, Nicole C	2018-025876 [DD]	Page 563
F. Lorch, Mary	2018-031317 [DD]	Page 692
G. Chase, Sarah Kimberly	2018-030584 [DS/JS]	Page 755

**Waivers**

H. Budd, Heather	2018-030563 [DS/JS]	Page 799
I. Shreier, Brett Howard	2018-032820 [DD]	Page 866
J. Williams, Jonathan Charles	2017-047417 [DS]	Page 1032

**3. Petition For Variance or Waiver**

A. Blair, AnnMarie	VW 2019-108	Page 1225
B. Carrier Zephyr, Jenifer	VW 2019-109	
C. Connell, Corey	VW 2019-116	
D. Giberson, Gary Douglas	VW 2019-092	
E. Rodriguez – Diaz, Jennifer	VW 2019-114	
F. Rodriguez, Laura Melissa	VW 2019-101	

**4. Declaratory Statements**

    A. Agriz, Antonio

**5. Exams – Considerations**

    A. Laporte, Catherine Ann

- B. Marinari, Joseph J
- C. Palacios, Frank V
- D. Prigge, Lauren
- E. Smith, Rodney Maurice

**6. Original Licensures**

- A. Mergenthal, Stephen Douglas

**7. Endorsement – Considerations**

- A. Brinister, Alexandru Trofimovich
- B. Nathan, Zev
- C. Nelson, Caleb John
- D. Sternberg, Elan Jeremy
- E. Welsela, Jennifer

**8. Maintenance & Reactivation – Null and Void Voluntary Relinquishments**

- A. Clavijo, James
- B. Guido, Gregory F.

**9. Maintenance and Reactivation – Voluntary Relinquishment**

- A. Aertker, Susan Beatty
- B. Barbera, Peter J
- C. Dukes, Myra Lynn
- D. Fennell, John Bratton
- E. Gregory, Paula M
- F. Harris, Jack Wesley
- G. Kenneth P. Brown, CPA, PA
- H. Murphy, Ginger
- I. Sibley, Timothy Alexander
- J. Weston, Fredrick D
- K. Wilson, Richard Keith

**10. Deceased Practitioners**

- A. Bloom Burt R.
- B. Brill, Michael E.
- C. Carr, Frank W.
- D. Claycomb, Frank ray Jr.
- E. Collins, Timothy
- F. Ortiz, Louis P.
- G. Romig,Christine G.
- H. Roth, Robert H.

**11. Firm Considerations**

- A. Pershing Yoakley & Associates P.C.

**12. Reports**

- A. Prosecuting Attorney Report – Chief Prosecutor
- B. Continuing Professional Education Minutes 4-23-19 (Chair) Ms. Rankin
- C. Continuing Professional Education Minutes 6-04-19 (Chair) Ms. Rankin
- D. Rules Committee Meeting Minutes 12-18-18(Chair) Ms. Keegan
- E. Rules Committee Meeting Minutes 4-22-19 (Chair) Mr. Socorro

**13. Rules**

- A. Memo to Board on Rules
- B. Rules Report – Sr. Assistant Attorney General
- C. 61H1-21.001 – Independence
- D. 61H1-25.001 – Responsibility for Other Persons (repeal)
- E. 61H1-27.001 – College or University Requirements

- F. 61H1-27.002 (2) – Concentrations in Accounting and Business
- G. 61H1-27.002 (4) – Concentrations in Accounting and Business
- H. 61H1-28.0011 – Examinations
- I. 61H1-33.006 – Inactive or Delinquent Florida Certified Public Accountants Who Desire to Become Active Licensees
- J. 61H1-36.004 – Disciplinary Guidelines

#### **14. Administration**

- A. Auditor General Draft Rules
  - Chapter 10.65 Draft Rules / Summary of Changes
  - Chapter 10.70 Draft Rules / Summary of Changes
  - Chapter 10.80 Draft Rules / Summary of Changes
  - Chapter 10.85 Draft Rules / Summary of Changes
- B. Discuss classification of a “Retired” status
- C. Remarks from the Acting Executive Director
- D. Update from Board Members / Staff Serving on NASBA Committees

#### **15. Florida Institute of Certified Public Accountants (FICPA)**

- A. Discussion

#### **16. Old Business**

#### **17. Other Business**

#### **18. Future Meetings**

July 11 <sup>th</sup> (Thursday) – PC	Department of Business and Professional Regulation 400 West Robinson Street, Orlando, FL
July 12 <sup>th</sup> (Friday) – Board	Department of Business and Professional Regulation 400 West Robinson Street, Orlando, FL
August 29 <sup>th</sup> (Thursday) – PC	Renaissance Hotel 1617 SE 17 <sup>th</sup> Street, Ft. Lauderdale, FL
August 30 <sup>th</sup> (Friday) – Board	Renaissance Hotel 1617 SE 17 <sup>th</sup> Street, Ft. Lauderdale, FL
October 17 <sup>th</sup> (Thursday) – PC	Hilton Daytona Beach Oceanfront Resort 100 North Atlantic Avenue, Daytona Beach, FL
October 18 <sup>th</sup> (Friday) – Board	Hilton Daytona Beach Oceanfront Resort 100 North Atlantic Avenue, Daytona Beach, FL
December 12 <sup>th</sup> (Thursday) – PC	Four Points Sheraton, Tampa 4400 West Cypress Street, Tampa, Florida
December 13 <sup>th</sup> (Friday) – Board	Four Points Sheraton, Tampa 4400 West Cypress Street, Tampa, Florida
January 30 <sup>th</sup> (Thursday) – PC	2020 Tentative Meeting Dates
January 31 <sup>st</sup> (Friday) – Board	
March 19 <sup>th</sup> (Thursday) – PC	

March 20<sup>th</sup> (Friday) – Board

May 14<sup>th</sup> (Thursday) – PC

May 15<sup>th</sup> (Friday) – Board

July 9<sup>th</sup> (Thursday) – PC

July 10<sup>th</sup> (Friday) – Board

August 27<sup>th</sup> (Thursday) – PC

August 28<sup>th</sup> (Friday) – Board

October 22<sup>nd</sup> (Thursday) – PC

October 23<sup>rd</sup> (Friday) – Board

December 10<sup>th</sup> (Thursday) – PC

December 11<sup>th</sup> (Friday) – Board

## **18. Adjourn**