

**DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION  
FLORIDA BOARD OF ACCOUNTANCY  
COMMITTEE ON CONTINUING PROFESSIONAL EDUCATION**

**May 30, 2023**

**CONFERENCE CALL**

**MINUTES**

The meeting was called to order at 10:21 a.m. by Jason Lafser, Chair. The roll was called by Karan Lee reflecting the following:

**Committee members present:**

Jason Lafser – Chair  
Sean Dennis  
Madeline Domino  
Jeffrey Haller  
Mindy Rankin

**Committee members absent:**

Maria Caldwell  
Bill Michaelson  
Johnny Session

**Staff members present:**

Roger Scarborough, Director  
Niyati Bhatt  
Harini Kumar  
Trecia Jenkins  
Karan Lee  
Barbara Whitney

**Others present:**

Rachelle Munson, Senior Attorney General and Board Counsel  
Carrie Summerlin, FICPA  
Jennifer Green – Liberty Partners of Tallahassee, LLC on behalf of the FICPA  
Jennifer Smith – WebCE Inc.  
Andy Freed – Beacon Hill Financial Educators  
Debra Casey – Checkpoint Learning (c/o CeriFi LLP) – Formerly PASS Online  
Janet Houston – Gleim Publications, Inc.  
Ryan Van Tress – Gleim Publications, Inc.

**Ratify Minutes from March 21, 2023 meeting.**

Motion was made by Ms. Rankin and seconded by Ms. Domino to approve the minutes from the March 21, 2023 meeting. Upon vote, motion passed unanimously.

## **ETHICS**

### **Consider Ethics Provider and Initial Course Applications:**

- a. The Center for Professional Education, Inc. (CPE Inc.)
  - 1. Ethical Conduct for Florida CPAs – Self-Study - 4 CPE hours

Motion was made by Ms. Rankin and seconded by Mr. Dennis to approve the course listed above. Upon vote, motion passed unanimously.

- b. WebCE Inc.
  - 1. Florida CPAs – Professional Ethics – Self-Study – 4 CPE hours

Motion was made by Mr. Dennis and seconded by Ms. Rankin to approve the course listed above pending the final exam is updated to show that at least 51 percent of the questions are related to Florida statutes and rules. The Committee ruled that the amended exam could be submitted to board staff to confirm the requested changes had been made to the exam. Upon vote, motion passed unanimously.

### **Consider Renewal Ethics Provider and Course Applications:**

- a. Accounting Tools, Inc.
  - 1. Accountant Ethics for Florida – Self-Study – 4 CPE hours
- b. Allison M. McLeod, L.L.M., CPA A PLLC
  - 1. A Basic Ethics Guidebook for Florida CPAs – Self-Study – 4 CPE hours
- c. Beacon Hill Financial Educators
  - 1. Ethics for Accountants: Florida – Self-Study – 4 CPE hours
- d. Becker Professional Education
  - 1. Ethics and Professional Conduct for CPAs in Florida – Self-Study – 4 CPE Hours
- e. Checkpoint Learning (c/o CeriFi LLP) – Formerly PASS Online
  - 1. Personal and Professional Ethics for Florida CPAs – Self-Study – 4 CPE hours
- f. CPE Depot
  - 1. Ethics for Florida CPAs – Self-Study – 4 CPE hours
  - 2. Ethical Conduct for Florida CPAs – Self-Study – 4 CPE hours
- g. CPE247.com LLC

1. Ethical Conduct for Florida CPAs – Self-Study – 4 CPE hours
- h. Encoursa LLC
1. Ethical Conduct of Florida CPAs – Self-Study – 4 CPE hours
- i. FICPA
1. Ethics: Protecting the Integrity of Florida CPAs – Live Study – 4 CPE hours
  2. Ethics: Protecting the Integrity of Florida CPA in Industry – Live Study – 4 CPE hours
  3. Ethics for Governmental CPAs in Florida – Live Study – 4 CPE hours
  4. Ethics: Protecting the Integrity of Florida CPA Online Course (ETHOL) – Self-Study – 4 CPE hours
- j. Gleim Publications, Inc.
1. Florida CPA Ethics – Self-Study – 4 CPE hours
- k. Jeff Sailor Seminar
1. Enjoyable Ethics for Florida CPAs – Live Study – 4 CPE hours
- l. JN Productions CPE Courses
1. Ethics for Florida CPAs – Self-Study – 4 CPE hours
- m. Kaplan Financial Education
1. Ethics for Florida CPAs – Self-Study – 4 CPE hours
- n. MasterCPE LLC
1. Ethics for Florida CPAs – Self-Study – 4 CPE hours
- o. Professional Education Services LP
1. Ethics and Professional Conduct for Florida CPAs – Self-Study – 4 CPE hours
- p. Professional Scholastics Inc.
1. Ethical Conduct for Florida CPAs – Self-Study - 4 CPE hours
- q. Surgent CFO Resources LLC dba CPAselfstudy.com
1. Ethical Conduct for Florida CPAs – Self-Study – 4 CPE hours
- r. Surgent McCoy CPE, LLC
1. Florida Ethics for CPAs – Self-Study – 4 CPE hours

- s. The Center for Professional Education Inc. (CPE Inc.)
  - 1. Ethical Conduct for Florida CPAs – Live Study – 4 CPE hours
- t. The CPE Store, Inc.
  - 1. Ethics for Florida CPAs – Self-Study – 4 CPE hours
- u. Ultimate CPE, Inc.
  - 1. Ethical Conduct for Florida CPAs – Self-Study – 4 CPE hours
- v. University of South Florida, St. Petersburg
  - 1. ABCs of Florida Ethics – Live Study – 4 CPE hours
- w. Web CPE Inc.
  - 1. Ethics for Florida CPAs – Self-Study – 4 CPE hours
- x. Western CPE
  - 1. Ethical Conduct for Florida CPAs – Self-Study – 4 CPE hours
  - 2. Ethics for Florida CPAs – Self-Study – 4 CPE hours
- y. Wolters Kluwer, CCH CPE Link
  - 1. A Basic Ethics Guidebook for Florida CPAs – Self-Study – 4 CPE hours

Motion was made by Ms. Rankin and seconded by Mr. Dennis to approve all courses listed in a – y above. Upon vote, motion passed unanimously.

## **REPORTS**

- a. Review of Department Approved Sponsors

Mr. Lafser acknowledge that the Committee received and reviewed the Department's Approved Sponsors list.

## **ADMINISTRATIVE**

- a. Laws and Rules (informational).
- b. Executive Director and/or Licensing Supervisor Remarks.

Mr. Scarborough informed the Committee that he is unable to give them an update on the current audit because we have not received a report from BET.

Mr. Scarborough gave an update on the CPE Reporting Tool. He shared with the Committee that he is working with Technology on sending out reminder notices to the licensees informing them of the status of their CPE for renewal.

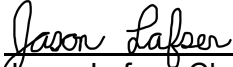
c. Other Business

None

**SET FUTURE MEETING DATE**

June 28, 2023 at 10:00 a.m.

Meeting adjourned at 11:03 a.m.

  
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Jason Lafser, Chair