

OKLAHOMA ACCOUNTANCY BOARD**MINUTES OF REGULAR MEETING**

September 16, 2022

The Oklahoma Accountancy Board (OAB) convened in regular session on Friday, September 16, 2022 at Oklahoma Accountancy Board, 201 NW 63rd St; Ste. 210, Oklahoma City, OK 73116. A recording of the meeting is on file in the OAB office. Members present at Call to Order:

David Greenwell, CPA, Chair
Sandy Siegfried, CPA, Vice Chair
Bryan Storms, CPA, Secretary
Robin Byford, CPA, Member
Mark Whitman, CPA, Member
Taylor Green, Member
Jody Manning, Member

Board staff present at the meeting: Randy Ross, Executive Director; Chloe Nettey, Deputy Director; Kylee Thompson, Administrative Assistant; and Assistant Attorney General John Settle was also present.

Agenda Item #1a – Call To Order: At approximately 9:00 AM, Chair Greenwell called the meeting to order.

Agenda Item #1b – Declaration of Quorum: Chair Greenwell declared a quorum.

Agenda Item #1c – Announcement of Legal Meeting Notice: Executive Director Ross confirmed the notice of the meeting was filed with the Secretary of State and the agenda for the meeting was properly posted in compliance with the Open Meeting Act.

Agenda Item #1d – Announcement of Absences and Action, if Necessary, to Determine Whether Absence(s) Were Unavoidable Pursuant to Title 59, Section 15.3(B)(5): There were no absences.

Agenda Item #2 – Announcement of Visitors: The following visitors were present for the appropriate time: Dean Taylor, representing the OSA and Blaine Peterson, representing the OSCPA.

Agenda Item #3 – Public Comment Period: Executive Director Ross advised the Board that he had not received any requests for public comment.

Agenda Item #4 – Consent Agenda: The Consent Agenda contained four items for the OAB's consideration: (1) Approve the Minutes of the August 12, 2022, Regular Meeting of the OAB; (2) Take official notice of the preliminary OAB financial statements for the months ending July 31, 2022 and August 31, 2022; (3) Take official notice of the experience verification applications which have been approved by the Executive Director;

and (4) Approve the actions taken by the Executive Director on applications and registrations filed since the previous meeting.

Motion by Byford that the Board approve the items on the Consent Agenda. Second by Storms.

A roll call vote was taken and recorded as follows:

Green AYE
 Manning AYE
 Byford AYE
 Siegfried AYE
 Greenwell AYE
 Storms AYE
 Whitman AYE

Agenda Item #5 – Discussion and possible action on Administrative Actions and recommendations and report from the Enforcement Committee:

ADMINISTRATIVE CONSENT ORDERS:

Case No. 2298 – Wendy Thompson, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 5.5 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$500, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 5.5 hours of CPE to apply to the shortage within thirty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 40 hours for 2018 (includes 2.5 hours ethics); 40 hours for 2019 (includes 6 hours ethics); and 34.5 hours for 2020 (includes 2.5 hours ethics).

Case No. 2302 – Andrew Bunch, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 20 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020 and 4 hours short of the 4-hour minimum ethics requirement for compliance period 2017-2019. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$1,000, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 20 hours of CPE to apply to the shortage within thirty days. 4 of those hours must be in ethics. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The

Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 43 hours for 2017 (includes 0 hours ethics); 40 hours for 2018 (includes 0 hours ethics); 40 hours for 2019 (includes 0 hours ethics); and 20 hours for 2020 (includes 4 hours ethics).

Case No. 2303 – Stephen Willis, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 9.5 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$500, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 9.5 hours of CPE to apply to the shortage within thirty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 45 hours for 2018 (includes 4 hours ethics); 24 hours for 2019 (includes 4 hours ethics); and 41.5 hours for 2020 (includes 0 hours ethics).

Case No. 2304 – Stephen McDonald, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 18 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020 and 7 hours short of the same requirement for 2019-2021. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$1,000, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 18 hours of CPE to apply to the shortage within thirty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 20 hours for 2018 (includes 4 hours ethics); 36 hours for 2019 (includes 0 hours ethics); 46 hours for 2020 (includes 4 hours ethics); and 31 hours for 2021 (includes 0 hours ethics).

Case No. 2305 – Nathaniel Bartel, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 5 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$500, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 5 hours of CPE to apply to the shortage within thirty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 45 hours for 2018 (includes 4 hours ethics); 40 hours for 2019 (includes 2 hours ethics); and 30 hours for 2020 (includes 0 hours ethics).

Case No. 2306 – Weishan Liang, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 4.5 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$500, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 4.5 hours of CPE to apply to the shortage within thirty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 39.5 hours for 2018 (includes 6 hours ethics); 38.5 hours for 2019 (includes 3 hours ethics); and 37.5 hours for 2020 (includes 2 hours ethics).

Case No. 2307 – William Perryman, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 11.5 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020 and 24 hours short of the same requirement for 2019-2021. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$1,000, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 24 hours of CPE to apply to the shortage within thirty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 41.5 hours for 2018 (includes 4 hours ethics); 37 hours for 2019 (includes 6 hours ethics); 30 hours for 2020 (includes 4 hours ethics); and 29 hours for 2021 (includes 4 hours ethics).

Case No. 2308 – Ryan Pixley, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 3 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$500, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 3 hours of CPE to apply to the shortage within thirty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 36.5 hours for 2018 (includes 3 hours ethics); 47.5 hours for 2019 (includes 4 hours ethics); and 33 hours for 2020 (includes 3 hours ethics).

Case No. 2309 – Rita Rushing, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 1 hour short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$500, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 1 hour of CPE to apply to the shortage within thirty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 40 hours for 2018 (includes 4 hours ethics); 39 hours for 2019 (includes 0 hours ethics); and 40 hours for 2020 (includes 4 hours ethics).

Case No. 2310 – William Jay McBrier, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 14 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$500, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 14 hours of CPE to apply to the shortage within thirty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and

further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 43 hours for 2018 (includes 2 hours ethics); 42.5 hours for 2019 (includes 2 hours ethics); and 20.5 hours for 2020 (includes 0 hours ethics).

Case No. 2311 – Robert Mark Collins, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 1.5 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$500, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 1.5 hours of CPE to apply to the shortage within thirty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 40 hours for 2018 (includes 4 hours ethics); 42 hours for 2019 (includes 4 hours ethics); and 36.5 hours for 2020 (includes 3 hours ethics).

Case No. 2312 – Ryan Heath, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 7.5 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020 and 4 hours short of the 4-hour minimum ethics requirement for that same period. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$500, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 7.5 hours of CPE to apply to the shortage within thirty days. 4 of those hours must be in ethics. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 50.5 hours for 2018 (includes 0 hours ethics); 20.5 hours for 2019 (includes 0 hours ethics); and 41.5 hours for 2020 (includes 0 hours ethics).

Case No. 2313 – Arthur Go, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 22 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020

and 24 hours short of the same requirement for 2019-2021. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$1,000, plus costs and attorney fees in the amount of \$80.00, which must be paid in twelve monthly installments of \$90. In addition, Respondent must submit 24 hours of CPE to apply to the shortage within thirty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 40 hours for 2018 (includes 4 hours ethics); 40 hours for 2019 (includes 4 hours ethics); 18 hours for 2020 (includes 0 hours ethics); and 38 hours for 2021 (includes 2 hours ethics).

Case No. 2314 – Dana Falletti, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 2.5 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$500, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 2.5 hours of CPE to apply to the shortage within thirty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 44 hours for 2018 (includes 0 hours ethics); 33 hours for 2019 (includes 5 hours ethics); and 40.5 hours for 2020 (includes 2 hours ethics).

Case No. 2315 – Bethanie Britton, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 2.5 hours short of meeting the 4-hour minimum ethics requirement for compliance period 2017-2019. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$500, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 2.5 hours of ethics CPE to apply to the shortage within thirty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 31 hours for 2017 (includes 0 hours ethics); 49.5 hours for 2018 (includes 0 hours ethics); and 40.5 hours for 2019 (includes 1.5 hours ethics).

Case No. 2316 – Jeffery Chris Davis, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 10 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$500, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 10 hours of CPE to apply to the shortage within thirty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 44 hours for 2018 (includes 5 hours ethics); 40.5 hours for 2019 (includes 4 hours ethics); and 25.5 hours for 2020 (includes 3 hours ethics).

Case No. 2317 – Gilbert Gibson, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 21.5 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020 and 28.5 hours short of the same requirement for 2019-2021. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$1,000, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 28.5 hours of CPE to apply to the shortage within sixty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 37 hours for 2018 (includes 2 hours ethics); 33.5 hours for 2019 (includes 2 hours ethics); 28 hours for 2020 (includes 0 hours ethics); and 30 hours for 2021 (includes 2.5 hours ethics).

Case No. 2318 – Brian Rippetoe, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 34.5 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$500, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 34.5 hours of CPE to apply to the shortage within sixty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 38 hours for 2018 (includes 0 hours ethics); 22.5 hours for 2019 (includes 4 hours ethics); and 25 hours for 2020 (includes 0 hours ethics).

Case No. 2319 – Andrew Maryadi, CPA

This case was opened as a result of a referral by the CPE Coordinator that Respondent was 25 hours short of meeting the 120-hour minimum CPE requirement for compliance period 2018-2020 and 25.5 hours short of the same requirement for 2019-2021. An Administrative Consent Order was offered by the Enforcement Committee and accepted by the Respondent whereby Respondent is assessed a fine of \$1,000, plus costs and attorney fees in the amount of \$80.00, which must be paid within thirty days of the effective date of the order. In addition, Respondent must submit 25.5 hours of CPE to apply to the shortage within thirty days. A proven violation of this ACO, the Act or the Board's Rules authorizes the Board to take such other and further action as the Board may deem appropriate under the Act. The Enforcement Committee recommends the Administrative Consent Order in this case be approved by the Board.

OAB Records Summary

CPE Status: Registrant reported 44.5 hours for 2018 (includes 1 hour ethics); 24 hours for 2019 (includes 3 hours ethics); 26.5 hours for 2020 (includes 5.5 hours ethics); and 44 hours for 2021 (includes 0 hours ethics).

Motion by Greenwell that the Board approve Case no. 2298, 2302, 2303, 2304, 2305, 2306, 2307, 2308, 2309, 2310, 2311, 2312, 2313, 2314, 2315, 2316, 2317, 2318, and 2319. Second by Storms.

A roll call vote was taken and recorded as follows:

Green AYE
Manning AYE
Byford AYE
Siegfried AYE
Greenwell AYE
Storms AYE
Whitman AYE

Agenda Item #6 – Discussion and possible action to select the OAB voting representative and alternate at the NASBA Annual Meeting: A brief discussion took place among the Board.

Motion by Storms that the Board appoint Greenwell as the voting representative and Byford as the alternate at the NASBA Annual Meeting.

A roll call vote was taken and recorded as follows:

Green AYE

Manning AYE
Byford AYE
Siegfried AYE
Greenwell AYE
Storms AYE
Whitman AYE

Agenda Item #7 – Discussion and possible action on invoice #0408 (\$28,560) from Thentia USA Inc.: A brief discussion took place among the Board.

Motion by Byford that the Board approve invoice #0408. Second by Manning.

A roll call vote was taken and recorded as follows:

Green AYE
Manning AYE
Byford AYE
Siegfried AYE
Greenwell AYE
Storms AYE
Whitman AYE

Agenda Item #8 – Discussion and possible action on budget request for fiscal year 2024: A brief discussion took place among the Board.

Motion by Manning that the Board approve the fiscal year 2024 Budget Request. Second by Green.

A roll call vote was taken and recorded as follows:

Green AYE
Manning AYE
Byford AYE
Siegfried AYE
Greenwell AYE
Storms AYE
Whitman AYE

Agenda Item #9 – Discussion on NASBA CPA Evolution Transition Recommendation: Executive Director Ross presented this item to the Board. The Board discussed the feedback of CPA Evolution Transition.

Motion by Storms to accept the Transition Policy recommendation. Second by Siegfried.

A roll call vote was taken and recorded as follows:

Green AYE
Manning AYE
Byford AYE
Siegfried AYE

Greenwell AYE
 Storms AYE
 Whitman AYE

Agenda Item #10 – New Business: There was no new business.

Agenda Item #11 – Discussion and possible action on report from the Executive Director:

Updates

- Fall 2022 Recognition Ceremony has been moved to November 5th at UCO
- The office has been running very well
- Work with Thentia and auto renewals is progressing
- We will have a meeting on Version 2 in the next week
- Remember NASBA annual meeting is October 31-November 2
- • I spoke to OU masters class this month

Expenditures made by the Executive Director between \$2,500 and \$5,000 since the preceding Board meeting:

- BEP One LLP – Sep 2022 Rent/Storage fee - \$4,869.00
- Collegesource – FY23 Subscription fee - \$3,031.05
- Bank of America – Jun 2022 Credit card fees - \$4,822.28
- Bank of America – Jul 2022 Credit card fees - \$2,535.40

Expenditures made by the Executive Director with approval of the Chair between \$5,000 and \$10,000 since the preceding Board meeting:

- NASBA – FY23 Membership dues - \$5,300.00
- NTT Data – Device set up for new computers - \$5,182.83
- USPS – Postage - \$10,000.00

Agenda Item #12 – Discussion and possible action on report from the Chair:

- Announce date and location of next meeting – 9:00 AM, Friday, October 21, 2022 at the Oklahoma Accountancy Board.

Agenda Item #15 – Adjourn: There being no further business to come before the Board, Chair Greenwell adjourned the meeting.

Motion by Whitman to adjourn the meeting. Second by Green.

A roll call vote was taken and recorded as follows:

Green AYE
 Manning AYE

Byford AYE
Siegfried AYE
Greenwell AYE
Storms AYE
Whitman AYE

The meeting was adjourned at approximately 9:31 AM.

David Greenwell, Chair Date

ATTEST:

Bryan Storms, Secretary Date

APPENDIX I
Actions Approved by the Executive Director
As of September 16, 2022

APPLICATIONS FOR CERTIFICATION (Successful Candidates):

Kyle Andrew Bacon
 Nathan Patrick Blakley
 Jaimie Bollman
 Kayla Cartwright
 Dalton James Crabb
 Suzanna Downey
 Madison Johnson
 Kate Kent
 Tyler Matthew Koonce
 Carlton Mhangami
 Robyn Annette Mose
 Jenny Dee O'Bryan
 Victory Ogunbanwo
 Jackson Matthew Smejkal
 Braden Donald Spratt
 Daniela Tidwell
 Harley Elizabeth Van Winkle

APPLICATIONS FOR TRANSFER OF EXAM CREDITS:

Marr Alma Francis George

APPLICATIONS FOR RECIPROCAL CPA CERTIFICATES:

Sean Patrick Friend
 Austin Wade Talton

APPLICATIONS FOR REINSTATEMENT OF CPA CERTIFICATES:

Gauri Aggarwal	16633
David L. Crowell	6872
Cynthia Nicole Lindsey	15977

INITIAL FIRM REGISTRATIONS OF PROFESSIONAL CORPORATIONS:

MJTCPA, A PROFESSIONAL CORPORATION
 NEWMAN & WEBB CPA PC

INITIAL FIRM REGISTRATIONS OF PROFESSIONAL LIMITED LIABILITY COMPANIES:

ANN S OSBURN PLLC
 SANDRA D. NEWMAN, CPA, PLLC
 SOONER TAX & ACCOUNTING PLLC
 WANN & COMPANY, CPA, PLLC

REINSTATEMENT OF CPA PROFESSIONAL LIMITED LIABILITY COMPANIES:

CHRISTOPHER A TURNER P.L.L.C. CERTIFIED PUBLIC ACCOUNTANT
 GBQ PARTNERS LLC
 JONES TAX AND ACCOUNTING SERVICES, PLLC
 PROVIDENT CPAS PLC

REINSTATEMENT OF CPA PROFESSIONAL CORPORATIONS:

MWH GROUP, P.C.

CERTIFICATES SURRENDERED BY REGISTRANTS:

Surrendering CPA Certificate Due to CPE Requirements:

David Braaten 8465 Issued January 23, 1986
 Nicolette Nicar 6315 Issued July 22, 1982

No Longer Residing in Oklahoma:

Katherine Stewart 18714 Issued November 13, 2018

Retired:

Glenn Guthmann 8869 Issued July 31, 1986

Other:

Kimberly Buckman 19076 Issued August 13, 2020

CERTIFICATES PLACED IN RETIRED STATUS BY REGISTRANTS:

CPAs:

Gary Venator	2776	7/31/1972
Stephen Ritter	2993	7/27/1973
Juanita Myers	3444	7/28/1975
Leo Voss	3683	1/27/1976
John Kirkpatrick	3723	4/30/1976
Tommy Brodrick	3754	7/19/1976
Jack Tallon	3825	7/19/1976
John Palovik	4128	7/18/1977

Edward Gilbert	4578	11/27/1978
Douglas Kinzie	5982	1/29/1982
Jill Smith	7391	1/26/1984
Lorraine Fett	7445	1/26/1984
Bradley Brill	7873	1/31/1985
Susan Myers	8017	1/31/1985
Mark Shires	8056	1/31/1985
Robert Sheets	9538	7/23/1987
Kay Doolin	9916	7/28/1988
Jane Hicks	10432	7/27/1989
Cheryl Helms	11195	1/31/1991
Barbara Trudeau	11420	7/25/1991
Rebecca Harris	11553	1/30/1992
Connie Conger	12462	1/21/1994
Shelle Lutke	12546	1/21/1994
Tiffany Jedlicka	14728	1/31/2000

INDIVIDUALS AUTOMATICALLY REVOKED AS A RESULT OF NON-COMPLIANCE WITH 68 O.S. § 238.1 AND 59 O.S. § 15.14:

CPAs:

Francis Potter	1515	7/29/1961
Walter Bethune	8461	1/23/1986

INACTIVE FIRMS:

CPA Corporations:

SANDRA D. NEWMAN, C.P.A., P.C.

**EXPERIENCE VERIFICATION ACTIVITY
SINCE THE PREVIOUS BOARD MEETING**

**Experience verification applications approved by the
Executive Director as of September 16, 2022**

**KYLE BACON
NATHAN BLAKLEY
KAYLA CARTWRIGHT
DALTON CRABB
SUZANNA DOWNEY
MADISON JOHNSON
KATLYNN KENT
TYLER KOONCE
JUSTIN LUDLUM
ALEXIS MANN
SAVANNA MANN
RYAN MARSHALL
THANG NGUYEN
JENNY O'BRYAN
ROBERT SHOUP
JACKSON SMEJKAL
DANIELA TIDWELL
HARLEY VAN WINKLE**