

**Occupational and Professional Licensing**  
District of Columbia Board of Accountancy  
1100 4th Street, SW Suite 400  
Washington, DC 20024



**Meeting Minutes**  
**December 20, 2024**

***\*\*This meeting is governed by the Open Meetings Act. Please address any questions or complaints arising under this meeting to the Office of Open Government at [opengovoffice@dc.gov](mailto:opengovoffice@dc.gov)***

The District of Columbia Board of Accountancy (Board) held its regularly scheduled meeting on Friday, September 13, 2024. This was a virtual meeting.

\* \* \* \* \*

The meeting was called to order at 9:06 a.m. by Board Chair, Robert Toderro, and attendance taken.

**Board Members Present:** Robert Toderro, Dr. Joseph Drew, Antonia Browning Smiley and Bridgett Gagne.

**Board Members Absent:** Jason Danielson (New member on travel)

**Staff Present:** Angela Meggett-Strudwick, Board Administrator; Leon Lewis, Program Manager; Jacqueline Noisette, Deputy Associate Administrator, Demetrius

**Legal Counsel:** Justin Orrison, Office of the General Counsel; April Randall, Legislative and Public Affairs Officer, Jessica Rice, DLCP Attorney Advisor

**Public Consumers Present:** Kari Bedell, Greater Washington Society of CPAs (GWCPAs), Paul Thrasher, GWCPAs, Ashley Campbell, NASBA

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**Agenda Item: Comments from the Public:**

Ms. Bedell stated that the (GWSCPAs) advocate for a bachelor's degree plus 2 years of general experience as an alternate pathway to licensure. She will put that on the website.

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**Agenda Item: Legislative Rule Making**

Legislative Update – April Randall gave a summary of the legislative rule process and how the pending legislation is moving forward. We can now proceed to a final rulemaking. This will still require publication in the D.C. Register, which we're prepared to do. Once it is ultimately published, the rules would take effect at that time. The legal team has plans to address the additional board members to expand the board during the Budget Support Act, which includes amendments to the DC code that usually has a budgetary nexus. April thinks this is the best vehicle for doing this.

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**Agenda Item: New Business**

*CE Advisory Committee Update* – Angela Meggett-Strudwick requested a motion to approve the 3 forms the committee created and updated for the CPE submissions.

Upon motion duly made at 9:38 a.m. by board member Dr. Joseph Drew, and properly seconded by board member, Bridgett Gagne, the Board unanimously voted to approve the new forms for the CPE submissions created by the CE Advisory Committee.

*CPA Additional Pathways* – Board requested the Legal Team to start sample language for the four (4) year and two (2) year pathway, as well as the automatic mobility to allow our CPAs to move between the different jurisdictions. The Chair requested a timeline and process outline. The Legal Team informed the Board that it would require a legislative amendment in the accountancy code, which is currently being proposed, which would allow only regulatory changes to establish education requirements going forward.

*NASBA CPA Evaluation* – Ashley Campbell presented the Board with a new program NASBA has initiated for evaluating candidates to speed up the process. Several jurisdictions have already signed on and NASBA is seeking the DC Boards participation in the program to benefit our candidates. Board delayed a decision on this evaluation method at this time because all Board members were not in agreement at this time. The Chair delayed the decision until next meeting.

*117<sup>th</sup> NASBA Annual Meeting Summary* – Dr. Drew gave a brief report summarizing the events of the conference.

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**Agenda Item: Acceptance of Draft Minutes**

Upon motion duly made at 10:12 a.m. by board member Joseph Drew, and properly seconded by board member Bridgett Gagne, the Board unanimously voted to approve the September 13, 2024, draft board meeting minutes.

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**Agenda Item: Report - Applications for Licensure**

Upon motion duly made at 10:15 a.m. by board member Bridgett Gagne, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted to approve the list of accountancy applications for licensure, attached hereto and made a part of the December 20, 2024, minutes.

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**Agenda Items: 2025 NASBA Conferences/Meetings & Events Calendar**

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**Upcoming Events**

*30th Annual Conference for Board of Accountancy Legal Counsel*

*March 25-27, 2025, Clearwater Beach, FL*

*43rd Annual Conference for Executive Directors & Board Staff*

*March 25-27, 2025, Clearwater Beach, FL*

*Western Regional Meeting*

*June 17-19, 2025, New Orleans, LA*

*Eastern Regional Meeting*

*June 24-26, 2025, Philadelphia, PA*

*118th Annual Meeting*

*Oct. 26-29, 2025, Chicago, IL*

Upon motion duly made at 10:12 a.m. by board member Bridgett Gagne, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted to approve the attendance for board members, board staff, and legal counsel, to all 2025 listed conferences.

**“Reserve the date”**

March 25-27, 2025, 43<sup>rd</sup> Annual ED Conference & 30th Annual Conference for BOA Legal Counsel

\* \* \* \* \*

**Proposed 2025 Board Meeting Dates** – The scheduled board meeting dates and upcoming conferences as listed.

January (Recess)	February 7	March TBA	April (Recess)
May 2	June (Recess)	July 11	August (Recess)
September 5	October (Recess)	November 7	December (Recess)

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Upon motion duly made at 10:30 a.m. by board member Joseph Drew, and properly seconded by board member Bridgett Gagne, the Board unanimously voted to approve the 2025 meeting calendar dates listed above.

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**Agenda Item: Old Business**

Accountancy Board Outreach Efforts – TBA. Angela Meggett-Strudwick will update the Board once outreach is organized.

**EXECUTIVE SESSION**

Upon motion duly made by board member Joseph Drew, and properly seconded by board member Bridgett Gagne, the board unanimously agreed by roll call to enter closed session at 10:33 a.m. pursuant to the authority of D.C. Official Code Section 2-575(b) (4) (A) to seek the advice of counsel, D.C. Official Code Section 2-575(b) (9) to discuss disciplinary matters, complaints, technical applications, and D.C. Official Code Section 2-775(b)(13) to deliberate upon a decision in an adjudication action or proceeding.

**Agenda Item: Technical Review:**

- *Complaint Review*
- *Reinstatement Review*

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**Agenda Item: Legal Matters:**

- *None*

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The following actions were taken due to the discussion during the closed session:

Upon a motion duly made at 12:56 p.m. by board member Joesph Drew, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted to accept the following legal recommendations:

TECHNICAL REVIEW APPLICATION		
NAME	CONDITIONALLY APPROVED	INCOMPLETE / DEFERRED
Robin Moffat	Active until February 7, 2025	Conditionally approved pending verification of licenses in other jurisdictions by the next board meeting on February 7, 2025

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Upon a motion duly made at 12:57 p.m. by board member Joesph Drew, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted to accept the following legal recommendations:

TECHNICAL REVIEW APPLICATION		
NAME	CONDITIONALLY APPROVED	INCOMPLETE / DEFERRED
Marcum LLP	Active until February 7, 2025	Issue a Formal Demand Letter for more information to determine the number of DC-based companies under the jurisdiction of the SEC and PCAOB that were audited by Marcum during January 2020 through December 2021
Ernst & Young	Active until February 7, 2025	Issue a Formal Demand Letter to determine the number of DC licensees involved with the cheating scheme

Upon a motion duly made at 12:59 p.m. by board member Joesph Drew, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted to accept the following legal recommendations:

TECHNICAL REVIEW APPLICATION		
NAME	APPROVED	INCOMPLETE / DEFERRED
PKF O'CONNOR DAVIES, LLP	X	Approve license and issue Advice of Informal Admonition.
UHY LLP	X	-
BPM LLP	X	-

Upon a motion duly made at 12:59 p.m. by board member Joesph Drew, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted to accept the following legal recommendations:

TECHNICAL REVIEW APPLICATION		
NAME	CONDITIONALLY APPROVED	INCOMPLETE / DEFERRED
Petergay Peterkin	Active until February 7, 2025	Conditionally approved pending verification of licenses in other jurisdictions by the next board meeting on February 7, 2025
Kimberly Erb	Active until February 7, 2025	Conditionally approved pending verification of licenses in other jurisdictions by the next board meeting on February 7, 2025
Michael Corvelli	Active until February 7, 2025	Conditionally approved pending verification of licenses in other jurisdictions by the next board meeting on February 7, 2025

Upon a motion duly made at 1:01 p.m. by board member Joesph Drew, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted to accept the following legal recommendations:

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TECHNICAL REVIEW APPLICATION		
NAME	APPROVED	INCOMPLETE / DEFERRED
Gergana Ivanova	X	-

Upon a motion duly made at 1:02 p.m. by board member Antonia Browning Smiley, and properly seconded by board member Joesph Drew, the Board unanimously voted to accept the following legal recommendations:

TECHNICAL REVIEW APPLICATION		
NAME	CONDITIONAL APPROVAL	INCOMPLETE / DEFERRED
Cropper accountancy Corporation	Approval upon fine PIF	\$3,000 civil fine, formal reprimand, and offer Consent Order. Approve once fine is paid.

Upon a motion duly made at 1:03 p.m. by board member Joesph Drew, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted to rescind the August 2, 2024, Consent Order imposed on Cherry Bekaert LLP.

Upon a motion duly made at 1:04 p.m. by board member Joesph Drew, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted in agreement in response to a comment received during the public notification period pertaining to the rule changes, by the DC Board of Accountancy. It was determined to give applicants competence for activities undertaken in this field over a current 10-year period preceding application.

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**Adjourn**

Upon motion duly made at 1:05 p.m. by board member Joseph Drew, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted to adjourn.

The next scheduled meeting of the Board of Accountancy will be December 6, 2024, call in/virtual.

Respectfully submitted,

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 Robert Todero, Chair

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 February 7, 2025  
 Date