

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



Meeting Minutes
September 13, 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***

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

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

Board Members Present: Robert Todero, Dr. Joseph Drew, and Bridgett Gagne.

The Chair recognized Antonia Browning Smiley who was not present because of medical reasons.

Board Members Absent: Antonia Browning Smiley (medical reason)

Staff Present: Angela Meggett-Strudwick, Board Administrator; Leon Lewis, Program Manager; Jacqueline Noisette, Deputy Associate Administrator; Shakira Richardson, Program Manager; Tiffany Crowe, DLCP Director (Joined 9:16 a.m.)

Legal Counsel: Marc Nielson, Office of the General Counsel; April Randall, Legislative and Public Affairs Officer (Joined 9:21 a.m.)

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

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Agenda Item: Comments from the Public:

Ms. Bedell stated that the (GWSCPAs) is interested in the Boards position on automatic mobility and where they stand with the dual pathways to licensure. She indicated that the GWSCPAs is in support of an additional pathway of 120 hours and automatic mobility to protect the CPAs in the metropolitan area of Maryland, DC and Virginia in the next couple of years while changing the requirements.

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Agenda Item: Legislative Rule Making

UAA Model Rule 5-7 Update – Leon Lewis and Marc Nielson updated the Board on the progress of the accountancy licensure proposed rulemaking. It is currently in revision and has not been published yet, but we hope to have it published by next month and have an update on its progress.

Agenda Item: New Business

CE Advisory Committee Update – Bridgett Gagne updated the board on the progress of the Advisory Committee fine tuning the process along with educating the licensees on what is needed to process and review their submissions. The committee created a form for the licensees to simplify the admission process for the certificates.

Zoom Training – Leon Lewis reported on the staff’s participation in Zoom training and supplied the dates for the board members training, September 16, and 17, 2024. Robert Todero requested the agency give the board members as much notice as possible for these, so they can plan to attend the trainings.

Annual Report – Leon Lewis informed the Board that the agency is working on a four (4) year report that will highlight what the Boards have been doing for the past 4 years, which will include the photos the board members took in May 2024. We are also working on the annual report for FY24.

PE Accounting Firm Structure – Bridgett Gagne expressed her concern for the structure of the firms and how it effects protections for the public and inquired if the GWSCPA have considered this issue. Ms. Bedell indicated the Society has not taken a position on it although have had some discussions about it.

Dedicated Executive Directors – Dr. Drew reported on the Legislative Advisory Committee advocating for a dedicated Executive Director with umbrella agencies. Dr. Drew contributed to the conversation which was adopted in the draft.

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Agenda Item: Acceptance of Draft Minutes

Upon motion duly made at 9:38 a.m. by board member Joseph Drew, and properly seconded by board member Bridgett Gagne, the Board unanimously voted to approve the August 02, 2024, draft board meeting minutes.

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Agenda Items: 2024 NASBA Conferences/Meetings & Events Calendar

Upcoming Events

[117th NASBA Annual Meeting](#)

October 27 - 30, 2024 | Orlando, FL

NASBA Annual Meeting– All board members present plan to attend, Robert Todero, Chairman, Bridgett Gagne, Board Member, Antonia Browning Smiley, Board Member and Dr. Joseph Drew, Consumer Member. DC Board Staff may attend but are undecided if they will attend as of the meeting date.

[GWSB - Department of Accountancy annual CPA Exam Information Session](#)

Wednesday, September 18, 2024, from 3:30 to 6:30 pm at Duques 150 Crain Center

Presentation Time; 4:05 – 4:40 pm DC Board of Accountancy

“Reserve the date”

October 27 - 30, 2024, NASBA Annual Meeting, Orlando FL

September 18, 2024, from 3:30 to 6:30 pm, GWSB - Department of Accountancy annual CPA Exam Information Session, Washington DC

Proposed 2024 Board Meeting Dates – The scheduled board meeting dates and upcoming conferences as listed.

Board changed the September 6 meeting to September 13, 2024, due to scheduling conflicts.

January (Recess)	February 2	March (Recess)	April (Recess)
May 3	June (Recess)	July (Cancelled)	August 2
September 13	October (Recess)	November (Recess)	December 6
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Agenda Item: Report - Applications for Licensure

Upon motion duly made at 10:00 a.m. by board member Bridgett Gagne, and properly seconded by board member Dr. Joseph Drew, the Board unanimously voted to approve the list of accountancy applications for licensure, attached hereto and made a part of the September 13, 2024, minutes.

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Agenda Item: Old Business

Accountancy Board Outreach Efforts – Angela Meggett-Strudwick updated the board to a change in time and a limit of attendees for the GW outreach scheduled for September 18, 2024. See details below:

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George Washington School of Business - Department of Accountancy annual CPA Exam Information Session scheduled for Wednesday, September 18, 2024, from 3:30 to 6:30 pm at Duques 150 Crain Center. DC Board of Accountancy presentation time; 4:05 – 4:40 pm. We are limited to five (5) people because of the small venue, per GW organizer. Kendra Covington will attend to man the DC BOA welcome table. She is not counted in the limited number.

EXECUTIVE SESSION

Upon motion duly made by board member Bridgett Gagne, and properly seconded by board member Joseph Drew, the board unanimously agreed by roll call to enter closed session at 10:05 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 11:00 p.m. by board member Joesph Drew, and properly seconded by board member Bridgett Gagne, the Board unanimously voted to accept the following legal recommendations:

TECHNICAL REVIEW APPLICATION		
NAME	APPROVED	INCOMPLETE / DEFERRED
Pinky Almo Shodhan	X	
Elezabeth Preston Fulon	X	

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Adjourn

Upon motion duly made at 11:00 p.m. by board member Joseph Drew, and properly seconded by board member Bridgett Gagne, 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,

Robert Todero, Chair

Date

Recorder: Angela Meggett-Strudwick, Board Administrator

