PUBLIC SESSION MINUTES
North Carolina State Board of CPA Examiners
April 20, 2020
1101 Oberlin Road
Raleigh, NC 27605

MEMBERS ATTENDING: Michael S. Massey, CPA, President; Barton W. Baldwin, CPA, Vice-President; Gary R. Massey, CPA, Secretary-Treasurer; Bernita W. Demery, CPA, Wanda B. Taylor, Esq.; Jennifer Van Zant, Esq, and Art M. Winstead, Jr., CPA (all by telephone).

STAFF ATTENDING: Robert N. Brooks, Executive Director; David R. Nance, CPA, Deputy Director; Frank Trainor, Esq., Staff Attorney; and Noel L. Allen, Esq., Legal Counsel (by telephone).

GUESTS: Sharon Bryson, CEO, NCACPA; Mark Soticheck, CPA, COO, NCACPA; and Kelli Knoble, CPA, Chair, NCACPA (all by telephone).

CALL TO ORDER: President Massey called the meeting to order at 10:00 a.m.

MINUTES: The minutes of the March 17, 2020, meeting were approved as submitted.

FINANCIAL AND BUDGETARY ITEMS: The March 2020 financial statements were accepted as submitted.

NATIONAL ORGANIZATION ITEMS: Messrs. Winstead and G. Massey moved to place Mr. Baldwin’s name in nomination for the Middle Atlantic Region of NASBA representative on the NASBA Nominating Committee. Motion passed. Messrs. G. Massey and Baldwin moved to place Mr. Winstead’s name in nomination for a NASBA Board of Director-at-Large position. Motion passed.

STATE & LOCAL ORGANIZATIONS: Ms. Bryson informed the Board that the NCACPA’s June 18, 2020, Board meeting and the CPA Inauguration in Winston-Salem are canceled. The June 18, 2020, Board meeting will be a conference call.

REPORT OF THE PROFESSIONAL STANDARDS COMMITTEE: Mr. M. Massey moved, and the Board approved the following recommendations of the Committee:

Case No. C2018412 - Close the case without prejudice.

Case No. C2019289 - Close the case without prejudice.

Case No. C2019312 - Close the case without prejudice with a Letter of Warning.

Case Nos. C2019317-1/2 - Close the cases without prejudice.
Case No. C2019330 - Close the case without prejudice.

Case No. C2019343 - Close the case without prejudice with a Letter of Warning.

REPORT OF THE PROFESSIONAL EDUCATION AND APPLICATIONS COMMITTEE: Mr. G. Massey moved, and the Board approved the following recommendations of the Committee:

Original Certificate Applications - The Committee recommended that the Board approve the following:

Zachary Walker Ray Anderson  
William C. Bauer  
Ryan Wade Brown  
Carlton Edward Bunn  
Eric Gregory Barnett  
Chuchu Xu Chatman  
Jillian Elizabeth Davis  
Matthew McLean Ludwig  
Rachel Marie Reinker  
Sandra Kay Richards  
Raghav Madduri Reddy  
Mary Catherine Roberts  
Elizabeth Sharon Whelan

Staff reviewed and recommended approval of the original application submitted by Savannah Renee Lassiter. Ms. Lassiter to disclose pertinent information with her Exam application but provided it with her certificate application. Staff recommended approval of the application with a one-year probationary period. The Committee recommended that the Board approve the staff recommendation.

Reciprocal Certificate Applications - The Committee recommended that the Board approve the following:

Shawn P. Adamo  
Mary Beth Antcliff  
Scott Foster Armstrong  
Jonathan David Austin  
Stephen Christopher Arber  
Sharon B. Bell  
David Michael Boyd  
Randeep Singh Brar  
Mark Stephen Bryant  
Stephanie Marie Cohen  
Stephen Michael Dille  
Michele Ann DiPaolo  
Christopher Michael Doughty  
Megan Wallenhorst Druckery  
Michael Steven George  
Thomas J. Geraghty, Jr.  
Robert James Gluck  
Joseph Larry Griffin, IV  
Tracy Allison Hammond  
Elizabeth D. Hattaway  
Ann Sweeney Hawkins  
Maurice Hawkins  
Wei He  
Brittany Nicole Heitkamp  
Jason Bernard Michael Hopkins  
Mark Edward Huebeler  
Nadia Paszczynski Humphrey  
Marla Goldman Kochelek  
Cody Dane Kriechenbaum  
Christine Elizabeth LaBarbera  
Michael Joseph LaCalamito  
Danny Lanier, Jr.  
Bryan Christopher Laya  
Brittani Nicole Maletta  
Jakub Waldemar Malecki  
Stephen John Marquardt
Reissuance of New Certificate - The Committee recommended that the Board approve the application for reissuance of a new certificate submitted by Chrissey Michelle Thomas, #39900.

PERSONNEL COMMITTEE: Ms. Taylor reported that the Personnel Committee met and made recommendations for all staff except Messrs. Brooks and Nance. Ms. Taylor and Mr. G. Massey moved to approve the Committee’s recommendations. Motion passed.

EXECUTIVE STAFF AND LEGAL COUNSEL REPORT: The Executive staff provided the monthly operational metrics and the Executive Staff Report.

ADJOURNMENT: Messrs. Winstead and Baldwin moved to adjourn the meeting at 10:45 a.m. Motion passed.

Respectfully submitted:

Robert N. Brooks
Executive Director

Attested to by:

Michael S. Massey, CPA
President