New CPA Evolution Curriculum

NASBA and the AICPA and will unveil the new CPA Evolution Model Accounting Curriculum during a free, online event on June 15-16, 2021.

The event, co-hosted with the American Accounting Association (AAA), will provide an overview of the new Model Accounting Curriculum, voted to advance in 2020 and culminating in a new Uniform CPA Exam in 2024.

The event will feature presentations on the inclusion of emerging topics such as Information Systems and Controls, Business Analysis and Reporting, and Tax Compliance and Planning.

To register for the event visit the AAA website, aaahq.org.

Exam Fee Increase Effective August 1, 2021

Effective August 1, 2021, the Uniform CPA Examination fees charged by Prometric will increase. None of the NASBA, AICPA, or Board fees are changing.

Applications postmarked on or before July 31, 2021, will be processed using the current fee schedule. Applications postmarked on or after August 1, 2021, will be processed using the new fee.

Please contact Phyllis Elliott, the Board’s Exam Specialist, by email at phyllise@nccpaboard.gov with questions about Exam applications.

<table>
<thead>
<tr>
<th></th>
<th>Applications Post-marked on or before July 31, 2021</th>
<th>Applications Post-marked on or after August 1, 2021</th>
</tr>
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<tbody>
<tr>
<td>Administrative Fees</td>
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<tr>
<td>Initial Exam Application</td>
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</tr>
<tr>
<td>REG</td>
<td>$224.99</td>
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</table>

Privilege License Reminder

NCGS 105-41 requires each owner, principal, or manager in a CPA firm or business providing accounting services to third parties to purchase a $50.00 annual privilege license from the North Carolina Department of Revenue (NCDOR).

In addition, a license tax of $12.50 is due for “each person employed who is engaged in the capacity of supervising or handling the work of auditing, devising or installing systems of accounts.”

Privilege licenses are renewable annually (Form B-202A) by July 1; no grace period is allowed before penalty accrues.

The privilege license is governed by the NCDOR; please direct all questions to the NCDOR’s Excise Tax Division at 1-877-252-3052.

In This Issue

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Disciplinary Action

Pursuant to NCGS 93-12(9), civil penalties are remitted to the North Carolina Civil Penalty and Forfeiture Fund (“Fund”) in accordance with NCGS 115C-457.2. NCGS 115C-457.1(b) states, “The Fund shall be administered by the Office of State Budget and Management. The Fund and all interest accruing to the Fund shall be faithfully used exclusively for maintaining free public schools.”

DAVID LEE BUBLICK, #38074 | DAVID L. BUBLICK, CPA, PLLC | HUNTERSVILLE, NC

THIS CAUSE, coming before the North Carolina State Board of CPA Examiners (“Board”) at its offices at 1101 Oberlin Road, Raleigh, Wake County, North Carolina, with a quorum present. Pursuant to N.C. Gen. Stat. §150B-41, the Board, the Respondent, and the Respondent Firm stipulate to the following:

1. David L. Bublick, CPA (hereinafter “Respondent”), is the holder of North Carolina certificate number 38074 as a Certified Public Accountant.

2. David L. Bublick, CPA, PLLC (hereinafter “Respondent Firm”), was a registered certified public accounting firm in North Carolina. Hereinafter, the Respondent and the Respondent Firm shall collectively be referred to as the “Respondents.”

3. The Respondent Firm had received a Fail on its most recent engagement peer review for the period ended November 30, 2018. For that peer review, it was noted that the Respondent Firm’s compilation report failed to make all disclosures required by the Statements on Standards for Accounting and Review Services (“SSARS”) and was not adhering to standards when presenting several key components of the financial statements.

4. Prior to the failed engagement peer review, the Respondent Firm had received a fail on a system peer review for the period ended November 30, 2015.

5. The Respondent Firm has been administratively dissolved, effective December 31, 2020, and now operates as a North Carolina office for Cunningham & Associates, CPAs. The Respondents have now ceased performing engagements that require a peer review.

6. The Respondents wish to resolve this matter by consent and agree that the Board staff and counsel may discuss this Consent Order with the Board ex parte, whether or not the Board accepts this Consent Order as written. The Respondents understand and agree that this Consent Order is subject to review and approval by the Board and is not effective until approved by the Board at a duly constituted Board Meeting.

BASED UPON THE FOREGOING, the Board makes the following Conclusions of Law:

1. The Respondents are subject to the provisions of Chapter 93 of the North Carolina General Statutes and Title 21, Chapter 08 of the North Carolina Administrative Code, including the Rules of Professional Ethics and Conduct promulgated and adopted therein by the Board.

2. The Respondents’ failure to perform attest and assurance services in accordance to standards constitutes a violation of 21 NCAC 08N .0404 and .0212.

3. Per N.C. Gen. Stat. §93-12(9), and also by virtue of the Respondents’ consent to this order, the Respondents are subject to the discipline set forth below.

BASED ON THE FOREGOING and in lieu of further proceedings, the Board and the Respondents agree to the following Order:

1. The Respondent has acknowledged that neither he nor the Respondent Firm are currently participating in, performing, or reviewing any services subject to peer review.

2. Prior to the Respondent participating in, performing, or reviewing any services subject to peer review, the following conditions apply:

   a. The Respondent shall participate in at least eight (8) hours of continuing professional education in SSARS annually for a period of three (3) years. Those hours may be counted towards the Respondent’s annual CPE requirement.

   b. In the event that the Respondent participates in an audit engagement, that audit must be subjected to review prior to issuance of the report, pursuant to the Board’s Pre-issuance Review Procedures.

Approved by the Board on March 17, 2021.
THIS CAUSE, coming before the North Carolina State Board of CPA Examiners ("Board") at its offices at 1101 Oberlin Road, Raleigh, Wake County, North Carolina, with a quorum present. Pursuant to N.C. Gen. Stat. §150B-41, the Board and the Respondents stipulate to the following:

1. Andrew K. Harris, CPA (hereinafter "Respondent"), is the holder of North Carolina certificate number 27787 as a Certified Public Accountant.
2. Andrew K. Harris, CPA, PLLC (hereinafter "Respondent Firm"), is a registered certified public accounting firm in North Carolina. Hereinafter, the Respondent and the Respondent Firm shall collectively be referred to as the "Respondents."
3. The Board received a referral from the North Carolina Department of State Treasurer’s Local Government Commission ("LGC") alleging that the Respondents had submitted an audit report for a local government entity that did not meet applicable financial reporting requirements.
4. The Board requested the Respondents address the audit report and audit documentation deficiencies as identified by the LGC.
5. The Respondents' audit procedures did not conform with generally accepted auditing standards.
6. The audit documentation was insufficient and did not conform with generally accepted auditing standards.
7. The Respondents wish to resolve this matter by consent and agree that the Board staff and counsel may discuss this Consent Order with the Board ex partee, whether or not the Board accepts this Consent Order as written. The Respondents understand and agree that this Consent Order is subject to review and approval by the Board and is not effective until approved by the Board at a duly constituted Board Meeting.

BASED UPON THE FOREGOING, the Board makes the following Conclusions of Law:

1. The Respondents are subject to the provisions of Chapter 93 of the North Carolina General Statutes and Title 21, Chapter 08 of the North Carolina Administrative Code, including the Rules of Professional Ethics and Conduct promulgated and adopted therein by the Board.
2. The Respondents’ failure to perform audit services in accordance with generally accepted auditing standards by failing to have sufficient documentation and quality control policies in place as set forth above constitutes a violation of 21 NCAC 08N .0403, .0409, and .0212.
3. Per N.C. Gen. Stat.§93-12(9), and also by virtue of the Respondents’ consent to this Order, the Respondents are subject to the discipline set forth below.

BASED ON THE FOREGOING and in lieu of further proceedings, the Board and the Respondents agree to the following Order:

1. The Respondents' privilege to perform audit services for municipal entities is revoked, effective for audits of financial statements for periods ending subsequent to July 1, 2020.
2. In the event that the Respondent or Respondent Firm desires to perform an audit of a municipal entity in the future, they must first inform the Board and undergo a review of the audit prior to issuance of the audit report, pursuant to the Board's Pre-Issuance Review Procedures.

Approved by the Board on April 19, 2021.

50 Years of NC CPA Licensure

Congratulations to the following individuals who have been licensed as North Carolina CPAs since May 1971:

- Nancy Bunn Bunting
- Thomas Edgar McKee
- Kelly Randolph Vann

North Carolina State Board of Certified Public Accountant Examiners
CPA Certificates Issued

On April 19, 2021, the Board approved the following individuals for North Carolina CPA licensure:

- Jack Harrison Archibald
- C. Nelson Bailey
- Ina Renee Balentine
- Charles Patrick Ball
- Bethany Christina Banks
- Bryant Walter Beaulieu
- Perry Ernst Beek
- Bradley James Bennett
- Sarah Alicia Blackwell
- Andrew N. Blevins
- Kevin M. Borkowski
- Akhari Khalinda Brown
- Brittany Janae Brown
- Yvonne Marie Brubacher
- Melanie Marie Burke
- Ana Maria de la Vega Chaparro
- Eric David Chapman
- Ananya Ashimkumar Chatterjee
- Chiichao Chiang
- Kevin James Conlon
- Manuel Enrique Contramaestre
- Shane Francis Cornuet
- Corey Daniel Crabtree
- Rochelle Rene Cuffe
- Vincent James Cuffie
- Taylor John Dahlstrom
- Christopher Dylan Davis
- Stephanie Grace Davis
- Anna Davydova
- Desiree Marie Doscher
- Jocelyn Angelina Edge
- Dina Sergeyevna Eggleston
- Lisa Ann Extance
- Christopher Seth Ezell
- Mark Anthony Felicissimo
- Nicole Ferren
- Kristina Olegovna Fischer
- Christopher Paige Flynn
- Christa Nicole Foy
- Bryan John Geels
- Samuel Henry Gessner
- Amanda Jean Golebiowski
- Andrew John Gorsage
- Colin Hugh Gough
- Sean Alan Grim
- Aimee Lynn Gysegem
- Leon Chalmos Harris
- Andrew James Irwin
- Katie Marie Kelly
- Madeleine Viola Kruener
- Palina Kucharavenka
- Dylan Mitchell Lambert
- Tina D. Lefkowitz
- Daniel Charles Leonard
- Marc Jordan Lichtman
- Lauren Alexis Magnuson
- Robyn Cox Martin
- Hendra McGettigan
- Terence Lee McGuire
- Joseph Kyle Milici
- Andrew David Minerich
- Jonathan Thomas Mohl
- Douglas Lynam Mortenson
- Adam Chase Mounce
- Kelsey Allison Murrell
- Connor David Noonan
- Olusegun Steve Ogunnelike
- Emilia Ortiz
- Joel Allan Owens
- Joseph Alan Partsch
- Kimberly Christine Peters
- Greg Timothy Phillips
- Robert Alphonse Pinault, Jr.
- Laurie Elaine Platner
- Jackson Bennett Powers
- Nathan Francis Rahmer
- Jonathan Wesley Ritter
- Carol Ann Roberts
- John Edward Sawickis
- David Andrew Scales
- Jeanette Carmen Serena
- Adrienne Collins Shoaf
- Richard Edward Sleigh
- Katelyn LeAnna Smith
- Mohsen Souissi
- Mary Harper Sowers
- Zachary Edward Spicer
- Jessica Lynn Stallworth
- Taylor RaMel Strickland
- Daniel Ruscoe Sullivan
- Analea Desiree von Seggern
- Tiffany Allyson Wentworth

2021 Board Meetings

Under NC Gen. Stat. §143-318.10, all official Board meetings are open to the public, and anyone may attend a meeting.

However, the public may be excluded from certain portions of the meeting as allowed by NC Gen. Stat. §143-318.11, Closed Sessions.

For more information on Board meetings, visit nccpaboard.gov/about.

**June 28**
10:00 a.m.
Raleigh/Webex*

**July 26**
10:00 a.m.
Raleigh/Webex*

**August 23**
10:00 a.m.
Raleigh/Webex*

**September 20**
10:00 a.m.
Raleigh/Webex*

**October 18**
10:00 a.m.
Raleigh/Webex*

**November 22**
10:00 a.m.
Raleigh/Webex*

**December 13**
10:00 a.m.
Raleigh/Webex*

*The location of this meeting will be determined by the COVID-19 restrictions in place at the time of meeting.

To participate in a WebEx meeting, send your name, email address, telephone number, and employer/firm name to communications@nccpaboard.gov at least three (3) business days before the scheduled meeting.
Successful CPA Exam Candidates

The Board is pleased to announce that the following North Carolina Uniform CPA Exam candidates passed the Exam between March 1, 2021, and March 31, 2021:

- Scarlett Abbigail Beamon
- Brett Joseph Bertemes
- Mary Evelyn Brown
- Zachary Eric Brown
- Gregory Carrington
- Mary Claire Chase
- James Miller Clark
- Jacoby Porter Demont
- Jessica Anne Earles
- Natalie Erin Ellis
- Michael Eugene Hancock
- Daniel Ryan Hudson
- Nicholas Thano Matthews
- Joseph Edward McCann
- Jacob Wayne Pastirik
- Melia Nicole Penninger
- Andrew Scott Polster
- Eugene Christopher Pursifull
- Serina Marie Ramos
- Allea Lea Roach
- Daniel Jason Ruggiero
- Masha Bragina Schmick
- Mark Roger Sears
- Mackenzie Anne Short
- Margaret Mae Strickland
- Irish Irena Thurston
- Evan Christopher Tucker
- Andrew Charles Ward
- Katherine Lindsey Way
- Angela Theon Webster

2021-Q1 CPA Exam Pass Rates (All Jurisdictions)

- AUD: 48.56%
- BEC: 62.16%
- FAR: 46.64%
- REG: 59.29%

CPA Exam Performance Summary: 2021 Q-1

North Carolina

Overall Performance

<table>
<thead>
<tr>
<th>Unique Candidates</th>
<th>622</th>
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<tr>
<td>New Candidates</td>
<td>190</td>
</tr>
<tr>
<td>Total Sections</td>
<td>760</td>
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<tr>
<td>Passing 4th Section</td>
<td>77</td>
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</table>

Sections / Candidates: 1.22

Pass Rate: 54.87%

Average Score: 73.32

Section Performance

<table>
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<tr>
<th>Sections</th>
<th>Score</th>
<th>% Pass</th>
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<tr>
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<tr>
<td>Re-Exam</td>
<td>449</td>
<td>72.8</td>
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<tr>
<td>AUD</td>
<td>201</td>
<td>72.12</td>
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<td>174</td>
<td>78.53</td>
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<tr>
<td>FAR</td>
<td>235</td>
<td>69.88</td>
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<tr>
<td>REG</td>
<td>150</td>
<td>74.27</td>
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Jurisdiction Ranking*

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<tr>
<th>Candidates</th>
<th>16</th>
<th>72.12</th>
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<tbody>
<tr>
<td>Pass Rate</td>
<td>54.87%</td>
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</table>

<table>
<thead>
<tr>
<th>Sections</th>
<th>14</th>
<th>73.32</th>
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<tbody>
<tr>
<td>Avg Score</td>
<td>73.32</td>
<td></td>
</tr>
</tbody>
</table>

*out of 55 jurisdictions

Average Age

- Q-1: 27.2
- Q-2: 27.3
- Q-3: 28.4
- Q-4: 28.2
CPA License Reclassifications
At its April 19, 2021, meeting, the Board approved the applications for CPA license reclassification submitted by the following individuals:

Reinstatement
Joshua Michael Boos, #38059
Richmond Hill, GA
Denise Maher Green, #21727
Summerfield, NC
Kari Elizabeth Patton-Motluck, #36807
Louisburg, NC
Mark Owen Smith, #37443
Chapel Hill, NC
Sonja Arlene Thomas, #34057
Kings Mountain, NC

Reissue
Woodrow Scott McDonald, #31643
Fletcher, NC

Exam Score Release Dates

<table>
<thead>
<tr>
<th>If you take your exam on or before:</th>
<th>Your target score release date is:</th>
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<tbody>
<tr>
<td>June 8, 2021</td>
<td>June 16, 2021</td>
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<tr>
<td>June 30, 2021</td>
<td>July 13, 2021</td>
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<tr>
<td>July 23, 2021</td>
<td>August 10, 2021</td>
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<td>August 15, 2021</td>
<td>August 24, 2021</td>
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<td>September 7, 2021</td>
<td>September 15, 2021</td>
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<td>September 30, 2021</td>
<td>October 12, 2021</td>
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<td>October 23, 2021</td>
<td>November 9, 2021</td>
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<td>November 15, 2021</td>
<td>November 23, 2021</td>
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<tr>
<td>December 8, 2021</td>
<td>December 16, 2021</td>
</tr>
<tr>
<td>December 31, 2021</td>
<td>January 11, 2022</td>
</tr>
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Inactive Status
Between March 1, 2021, and April 30, 2021, the Board approved the individuals listed below for inactive status. “Inactive,” when used to refer to the status of a person, describes a person who has requested inactive status and has been approved by the Board and who does not use the title certified public accountant, nor does he or she allow anyone to refer to him or her as a certified public accountant, and neither he nor she nor anyone else refers to him or her in any representation as described in Rule .0308(b) of this Section [21 NCAC 08A .0301(b)(20)].

Cynthia Daniel Chandler, #12387  Burlington, NC
Caroline Colborn Youngblood, #13743  Charlotte, NC
Jane Fogarty Cox, #17891  Raleigh, NC
Deborah Horne Cox, #22432  North Myrtle Beach, SC
Amanda Lynn D’Aprilie, #43146  Meridian, MS
Larry Perdue, #13571  Thomasville, NC
Rhonda P. Campbell, #26095  Kings Mountain, NC
Richard Alan Swartzel, #18893  Hickory, NC
Tiffany Langdon Miller, #35509  Raleigh, NC
Charles Hilton Wood, Jr., #24585  Sylacauga, AL
Roger Lee Wiggins, #26835  Sylva, NC
Joseph R. Babcock, #32840  Holly Springs, NC
Shelia Sen Gupta Bovard, #20982  Midland, NC
Joyce Marie Coggin, #27943  Charlotte, NC
Roy Allen Hunt, #14377  Fort Mill, SC
Kevin Pickard, #17677  Lehi, UT
Robert Allen Carroll, II, #36459  Glen Allen, VA
John Robert Cauble, Jr., #14720  Greensboro, NC
Terry Wayne Mullins, #42131  Indian Land, SC
Randall Reid Black, #14436  Lexington, NC
David Michael Houck, #20931  Candler, NC
Herman Brock, #10805  Raleigh, NC

Gregory Keith Herring, #13907  Greensboro, NC
Milton Larry Stanfield, #19788  Conyers, GA
Jennifer Lynn Coats, #31017  Wilkesboro, NC
John Briggs Woodward, #34627  Raleigh, NC
Mary McGraw Auman, #16284  Raleigh, NC
George Henry Knostman, IV, #21489  Winston-Salem, NC
Jennifer McDaniel, #21539  Raleigh, NC
Chester Joseph Popkowski, Jr., #36971  Charlotte, NC
Walter Keith Davis, #28971  Marvin, NC
Petra Weishaupt-Smith, #20948  Cary, NC
Kathleen C. Barbieri, #22694  Ludlow, MA
Pamela Randall Lambert, #24994  Raleigh, NC
Dee Green Leslie, #17668  Columbia, SC
Kathryn Eve McCoy, #25795  Columbia, SC
Vickie Wright Pope, #17367  Charlotte, NC
James Scudder, Jr., #14757  Charlotte, NC
Evan Taylor Gentile, #37321  Charlotte, NC
Russell Raymond Hinesley, #23433  Bailey, NC
John Richard Stewart, #9889  Denver, NC
Allen W. Houck, #24999  Raleigh, NC
John Winston Lea, #23443  Rocky Mount, NC
Lisa Lynn Thomas, #26367  Gastonia, NC
2021-2022 Board Committees

Executive Committee

The President, Vice-President, and Secretary-Treasurer automatically comprise the Executive Committee. This Committee works with the Board’s Executive Staff to ensure that the Board fulfills its public protection mandate while operating in a fair, efficient manner.

Barton W. Baldwin, CPA, President
Bernita W. Demery, CPA, Vice President
Gary R. Massey, CPA Secretary-Treasurer

Professional Education & Applications Committee

The Professional Education & Applications Committee works with the Board’s Exam and Licensing sections to review Uniform CPA Exam applications, original and reciprocal CPA certificate applications; CPA certificate reissuance and reinstatement applications; CPA firm registrations; CPE compliance matters; and other issues related to examination and licensure. The Committee makes recommendations to the full Board for approval or disapproval of all applications it reviews. Members are appointed by the Board President.

Wanda B. Taylor, Esq., Chair
Gary R. Massey, CPA
Bernita W. Demery, CPA

Professional Standards Committee

The Professional Standards Committee provides guidance to the Board staff on alleged violations of the North Carolina General Statutes and North Carolina Administrative Code related to the public practice of accountancy in North Carolina. The Committee does not determine guilt or innocence but makes recommendations to the full Board regarding the disposition of matters brought to the Committee by the Professional Standards Staff. Members are appointed by the Board President.

Arthur M. Winstead, Jr., CPA, Chair
Barton W. Baldwin, CPA
Jennifer K. Van Zant, Esq.

Audit Committee

The Audit Committee participates in hiring an independent auditor and works with the Board’s Deputy Director to prepare for the required annual audit. The Committee questions the Executive Staff and the auditors to evaluate the audit process and receive reports directly from the auditor in connection with the audit’s findings. The Committee presents the auditor’s findings to the full Board, ensuring all members understand any auditors’ recommendations before formally accepting the audit report. Members are appointed by the Board President.

Gary R. Massey, CPA, Chair
Michael S. Massey, CPA
Bernita W. Demery, CPA

Investment Committee

The Investment Committee provides Board oversight and guidance to Board staff related to the Board’s investment portfolio. Members of the Investment Committee are fiduciaries of the portfolio, responsible for overseeing investment policies, guidelines, investment performance, and related risk management. Members are appointed by the Board President. The Board’s Executive and Deputy Director serve as non-voting ex-officio Committee members.

Gary R. Massey, CPA, Chair
Barton Baldwin, CPA
Wanda B. Taylor, Esq.

Personnel Committee

The Personnel Committee provides guidance, oversight, and support to the Executive Staff to develop and implement employee staffing, performance management, and compensation systems. The Committee verifies that personnel policies and procedures are compliant with state and federal labor laws and are applied consistently. Members are appointed by the Board President.

Wanda B. Taylor, Esq., Chair
Gary R. Massey, CPA
Arthur M. Winstead, Jr., CPA

Strategy Committee

The Strategy Committee is responsible for assisting the Board with its responsibilities for the Board’s mission, vision, and strategic direction. The Committee advises the Executive Staff on strategic planning matters, including developing strategic objectives with measurable goals and time targets, developing a dashboard of key indicators, and monitoring the Board’s performance. Members are appointed by the Board President.

Michael S. Massey, CPA, Chair
Bernita W. Demery, CPA
Jennifer K. Van Zant, Esq.
North Carolina State Board of Certified Public Accountant Examiners
PO Box 12827
Raleigh NC 27605-2827

Notice of Address Change
Please Print Legibly

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<tr>
<th>Full Name:</th>
<th>Last 4 Digits of SSN:</th>
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<tr>
<td>Fax form to:</td>
<td>(919) 733-4209</td>
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Pursuant to 21 NCAC 08J .0107, all certificate holders & CPA firms shall notify the Board in writing within 30 days of any change in home address & phone number; CPA firm address & phone number; business location & phone number; & email address.

2,000 copies of this document were printed in May 2021 at an estimated cost of $1,825 or approximately 91¢ per copy.