

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 Dougherty
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 Pasiecznyk 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

Matthew Scott McGuire
Anne Elaine Mcloughlin
Ryan Matthew McLean
Suneela Molagavalli
Gregory Edward Morrow
Lauren Ann Nichols
Thomas Joseph O'Hara, Jr.
James Richard Pokorny
Luke Wesley Robertson
Neil Jay Rosenberg
Jason Arthur Rothenburger

Nicole Marie Scarborough
Jian Shen
Hyun min Shin
Patricia Pitts Spitz
Debra Michelle Starr
Brenton James Tagg
Alex Kittrell Vaughn
Dennis Marlowe Vaughn, Jr.
Yijing Teng Wyant
Matthew Oliver Young
Yidi Zhou

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:

Attested to by:



Robert N. Brooks
Executive Director



Michael S. Massey, CPA
President