

Activity Review North Carolina State Board of Certified Public Accountant Examiners

1101 Oberlin Rd., Ste. 104 • PO Box 12827 • Raleigh, NC 27605 • 919-733-4222 • nccpaboard.gov • No. 5-2024

## 2024-2025 Individual CPA **Certificate Renewal The Board Answers Licensee's FAQs**

Read More on Page 2

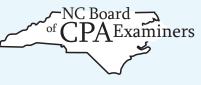


#### In This Issue

| Disciplinary Action                     | 3 |
|---|---|
| Board Member Spotlight: Jodi Kruse, CPA |   |
| CPA Certificates Issued                 |   |
| Choosing CPA-retired or Inactive Status | 5 |
| Privilege License Tax Repealed          |   |
| Exam Testing & Score Release Dates      |   |
| Noel L. Allen Honored                   |   |
| CPA Certificate Reclassifications       | 7 |

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# 2024-2025 Individual CPA Certificate Renewal

<u>21 NCAC 08J .0101</u>, *Annual Renewal of Certificate*, requires all active CPAs to renew their certificates annually by July 1.

This year, the individual CPA license renewal is available only through the Board's portal. If you don't have an account, you can't renew your license. <u>Instructions</u> for creating your account are available from our <u>website</u>. If you created an account to renew your CPA firm's registration, you do not need to create a new account.



After you create your account, you may log in and complete the renewal.

Please be sure you have a certificate of completion for each course you claim to meet the 2023 CPE requirements, including the required 50-minute ethics course.

In addition to reporting CPE Compliance, you must attest to Moral Character questions, the Public Notice Statement and Disclosure Statement, and affirm you know and understand the North Carolina Accountancy Statutes and Administrative Code, including the rules of Professional Ethics and Conduct.

Once all attestations are complete, you will proceed to the payment page to pay the \$60 renewal fee. The Board accepts MasterCard, Visa, and American Express. Once payment is complete, you will receive a receipt confirming payment.

Please send your questions about the CPA certificate renewal, to the Board's Licensing Manager, Buck Winslow, at **buckw@nccpabopard.gov**.

#### **FREQUENTLY ASKED QUESTIONS**

- Q. What do I do if I set up my account but can't remember my password?
- A. The dashboard has a "Forgot Password?" feature that allows you to request a new password. The email will be sent to the email address you used to set up your account.
- Q. I can't remember my password or the answers to my security questions. What should I do?
- A. Please call the Board office at (919) 733-4222 so the Board staff can help you by assigning a temporary password or generating the option for you to re-set up your account.
- Q. I have decided to retire, and I want to apply for CPA-retired status. What do I need to do?
- A. Before applying for CPA-retired status, read <u>21 NCAC 08J .0112</u> and <u>08A .0307(a)(2)</u> to ensure you understand the CPA-retired status and its restrictions. To apply for CPA-retired status, please complete the Application for CPA-retired Status available on the <u>Forms & Applications page</u> of our <u>website</u>.

You may email your application to Alice Grigsby, one of the Board's Licensing Specialists, at <u>aliceg@nccpaboard.gov</u>. If you prefer to print and mail your application, please send it to NC State Board of CPA Examiners, PO Box 12827, Raleigh, NC 27605.

The Board reviews and approves your application for CPA-retired status, the Board staff will email you a link to renew your certificate and pay the \$60 fee. The Board accepts MasterCard, Visa, and American Express. Once payment is complete, you will receive a receipt confirming payment.

- Q. If I am retiring and don't plan to hold myself out as a CPA or CPA-retired, what form must I complete to notify the Board of my intention?
- A. Since you do not intend to hold yourself out as a CPA or use CPA-retired, you may request inactive status by completing the online <u>Request for Inactive Status form.</u>

## **Disciplinary Action**

Under NCGS 93-12(9), "Any disciplinary action taken [by the Board] shall be in accordance with the provisions of Chapter 150B of the General Statutes. The clear proceeds of any civil penalty assessed under this Section shall be remitted to the Civil Penalty and Forfeiture Fund in accordance with G.S. 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."

### ANDREW K. HARRIS, #27787 | ANDREW HARRIS, CPA, PLLC | GREENVILLE 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 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 Harris, CPA, PLLC (hereinafter "Respondent Firm"), is a registered certified public accounting firm in North Carolina. Hereinafter, the Respondent and the Respondent Firm are collectively referred to as the "Respondents."
- 3. On December 6, 2022, the Respondents signed a Consent Order as a resolution of several outstanding matters.
- 4. On December 19, 2022, the Board approved the Consent Order.
- 5. The Respondents agreed to the following terms of the Consent Order:
  - (1) The Respondent's Certified Public Accountant certificate is hereby suspended for five (5) years. The suspension is stayed. The Respondent expressly consents to having his stay lifted immediately upon a finding by the Board's Professional Standards Committee that any one of the following obligations have not been met:
  - (2) As a condition of the stay, during the five-year period,

a. The Respondent shall provide the Board with quarterly monitoring reports from a qualified provider showing that the Respondent is receiving treatment of the condition set forth in Finding of Fact No. 11.

b. Upon recommendation of the provider, the Board's Professional Standards Committee may, in its discretion, relieve the Respondent of this monitoring requirement.

c. The Respondents may not engage in any services subject to peer review.

d. The Respondent may only supervise one office location.

- 6. The Respondent has not met all of the requirements necessary to meet the conditions of the stay.
- 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 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:

- 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. By virtue of the facts set forth above, the Respondent has failed to comply with the terms of a Board Order, constituting a violation of 21 NCAC 08N .0203(b)(3).
- 3. Further, the Respondent expressly consented to the lift of the stay of his suspension in the December 19, 2022, Consent Order.
- 4. Per NC 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:

- The stay of the Respondent's Certified Public Accountant certificate is hereby lifted and the suspension of Respondent's CPA certificate is hereby active for the period set forth in the December 19, 2022, Consent Order.
- 2. Because it will no longer be owned by an active CPA, the firm registration of Respondent Firm is hereby cancelled.
- 3. After the active suspension period has elapsed, the Respondent will be eligible to seek reactivation of his CPA certificate by submitting an application for reinstatement.

## **Board Member Spotlight: Jodi K. Kruse, CPA**

Jodi K. Kruse, CPA, a North Carolina since 2010, was appointed to the Board in 2021. In 2023, she was elected Secretary-Treasurer and re-elected in 2024. Ms. Kruse is Chair of the Audit Committee and a member of the Executive Committee, the Professional Standards Committee, the Investment Committee, and the Education Task Force. She is a past member of the Professional Education & Applications Committee and the Strategy Committee. Ms. Kruse is a member of the AICPA and the NCACPA.

Why did you want to serve on the Board? Having spent my entire career in public accounting, I wanted to see a different side of the profession. I wanted exposure to the challenges that others in the profession might be facing to see if my experiences might provide insights to help address and tackle these matters.

What would you like people to know about the Board? The Board Staff members are incredibly helpful and knowledgeable. Their aggregated years of experience provide those in the process of being licensed and those already licensed with a resource that most State Boards of Accountancy cannot offer. We are fortunate that the Board is hands-on throughout the entire licensing process.

Where do you work, and what's your job title? I am a Managing Director in the Assurance Practice at EY.

What's the best part of your job? I thoroughly enjoy learning about my clients, their businesses, and how they adapt to change. I also enjoy coaching and developing our less experienced individuals. Seeing those you mentor progress and achieve their goals is fulfilling.

What motivates you at work? I work with amazing people who are smart and helpful. Being in a culture that supports continuous learning and development motivates me to continue challenging myself and expanding my knowledge. There is never a lack of new opportunities to grow and learn.

**Do you have any mentors in your professional life?** I have multiple mentors. I frequently reach out to them to discuss client matters, team challenges, or personnel concerns. The mentors range from experienced partners within the firm (men and women) to retired partners. They each provide valuable perspectives based on their experiences.

What advice would you give a CPA entering the profession? Embrace the experiences and know that sometimes you have to put in some hard work (busy season, longer hours) to reap the rewards the profession has to offer. Whether you choose public, private, or governmental accounting, there is so much to learn. The apprenticeship model of the profession is so valuable to your individual development and future path.

If you were not a CPA, what career would you have? My husband says I would train dogs. I am very good at organizing and project management, so maybe I would be an events coordinator.

What kind of music do you like? What's the best concert you've attended? Paul McCartney (I have seen him twice) and the Rolling Stones. Both were amazing! More current music on the playlist is the Lumineers, who are also quite good in concert.

**Do you have any hobbies?** I enjoy spending time with my family, exercising, reading, doing jigsaw puzzles, and being at our second home in Calabash.

What is the number one item on your bucket list? I would really like to drive across the US and visit the Grand Canyon; there are so many spectacular places to visit and hike. I also would like to conquer my fear and go on a hot air balloon ride.

**Do you have any pets?** My family has two dogs. Lucy is an intense 19-pound mutt who lets the neighbors know when a delivery truck is approaching. Maxine is a 40-pound Australian Shepherd-Poodle mix who is the happiest when getting belly rubs.

**Is there a song that is meaningful to you?** "Let It Be" by the Beatles. Life will be overwhelming at times, and so much of it is out of our control. Let it be.

What is the best advice you have received? Stay authentic to yourself. Embrace your genuine self and refrain from comparing yourself to others. You will experience a deeper sense of happiness and peace.



#### **REPEAL OF PRIVILEGE LICENSE TAX REQUIREMENT**

Pursuant to <u>Session Law 2023-134</u>, effective July 1, 2024, professional privilege licenses are no longer required. However, privilege licenses are still required for loan or finance companies.

NC General Statute 105-41 required every individual in North Carolina who practiced a profession (including accounting) or engaged in a business to obtain a statewide license for the privilege of practicing the profession or engaging in the business. Attorneys-at-law and other professionals are no longer required to apply to the Secretary of Revenue for a privilege license or renew an existing privilege license each year beginning July 1, 2024. The last license period will be for the fiscal year, July 1, 2023, to June 30, 2024.

Please see the NC Department of Revenue's November 2023 <u>Privilege License Tax Bulletin</u> for more information.

#### **CHOOSING BETWEEN CPA-RETIRED AND INACTIVE STATUS**

21 NCAC 08J.0112, "Retired Status," became effective September 1, 2023, and created an opportunity for individuals to apply for CPAretired status.

The chart to the right provides an overview of the differences between CPA-retired and inactive status.

The Board is developing an FAQ document to help CPAs decide which status best suits their needs.

For detailed information about each status, please consult the **Board Rules**.

Please send specific questions about CPA-retired status to Frank Trainor, Board's Staff Attorney, at ftrainor@nccpaboard.gov.

|   | CPA-Retired Status                               | Inactive Status                   |
|---|--|-----------------------------------|
| Can l use the CPA title ("hold out")?             | Yes, but as CPA-retired<br>only                  | No                                |
| Can I perform accounting work?                    | No, except for specific tax preparation services | Yes                               |
| Can I perform non-accounting work?                | Yes  | Yes                               |
| Am I required to complete<br>CPE each year?       | No   | No                                |
| Am I required to renew my license annually?       | Yes  | No                                |
| Am I subject to disciplinary action by the Board? | Yes  | Possibly                          |
| Can I own part of a CPA firm?                     | No   | Yes                               |
| Can I apply to return to active status?           | Yes, if you meet the requirements                | Yes, if you meet the requirements |

#### **CPA CERTIFICATES ISSUED**

On April 24, 2024, the Board approved the following individuals for North Carolina CPA licensure:

Esther Antonio Christopher Walden Bailey Hollie Diane Bancroft Jay Francis Barber John Gordon Barrasso Brendon Pearson Beach Kylie Evan Bilbrey Jeremy R. Bottlinger Timothy Cornell Buroff Mia Janae Bush Kurt J. Cerrato Eunho Cho Jesse Daniel Chroman Blake Edward Clark Griffin Michael Claus Bruce Kevin Cole Lynn Mary Couturier John M. Craig III Michael James Crose Brittany Cummings Noah Konieczny Danzig Thomas Earl Davenport III

Carson Matthew Davis William Thomas Davis Virginia Clayton Dawson Kyle John Douglas Julia A. DuMars Kelley Marie Grow Jeffrey Carl Himmelreich David Ross Iles Stacy Marie James Joseph D. Johnston Ari Matthew Kaplan Qiao Ke Randy Nicholas Kohn Dillon Alexander Kosofsky Kyle John Krebs Jeffrey Allan Larsen Meredith Jane Law Ryan Joseph Leigh Stephanie Rae Lemons Brian Michael Lewis Yiran Li **Tianjin Luo** 

Timothy Michael Lyons Donald Melvin Masters Jr. Megan Laurel McConnell Ryan Chad McMillin Pablo Monteverde Medina Sean Morgan Mickle Tyler Moothart Tracy Lynn Nolberto Ryan Timothy O'Connor Yumi Oh Sloane Avery Patterson Barbara M. Petro Stela Veselinova Petrova Madeline Dale Planton Michele Marie Powell **Bailey Noel Pullin** Qi Qi Kelley A. Quinn Omar Ritter Katherine Ventre Riveness Mark Andrew Rivera John Joseph Rosano

Matthew Robert Simeone Mackenzie Jane Smith ShaQuita Rekia Smith Ryan Michael Starkes Denise Michelle Stubbs Chloe Elizabeth Thaeler Christopher Edward Theroux Benjamin Paul Thompson Andrea Megan Thomson Evelin Isabel Tonkinson William Gunning Tubbs Jana Mahareth Vargas Diaz John Lewis Vincie III Jared Russel Wagner Jack Michael Waller Guoyin Wang Wenjun Wang Spencer Christian White Darrin Jordan Williams Jessica T. Woodhouse Erik J. Wszalek Xiaoning Zhang

North Carolina State Board of Certified Public Accountant Examiners

## Elon University Honors Noel L. Allen, Esq.

On April 19, 2024, Elon University presented Noel L. Allen, Esq., the Board's Legal Counsel, with the prestigious Elon Medallion, the university's highest honor for service. As part of the Medallion ceremony, the university announced that a residence hall would be named after Mr. Allen.

Elon previously recognized Mr. Allen as Young Alumnus of the Year in 1982 and Distinguished Alumnus of the Year in 2008. In 2009, he was awarded an honorary doctorate of humane letters.

Upon receiving the Medallion, Mr. Allen said, "The weight of the medallion bends and pulls me but lifts me," Allen said.



"You're so generous to think of me this way. When they speak of Elon, will they just be nostalgic, or will they be inspired? I believe we are building every day that inspiration."

A 1969 Elon graduate, Mr. Allen has been a member of Elon's Board of Trustees since 1985 and served as chair from 2001 to 2003. He was pivotal in establishing the Elon University School of Law and is a member of the law school's advisory board.

Describing Mr. Allen's service to Elon as a "labor of love," Elon President Connie Ledoux Book said, "Every major organization has its 'pantheon'--the legendary, long-serving leaders who embody the spirit and the culture of their community. There is no better word than 'wisdom' to describe Noel's impact on our community."

After earning a law degree from the University of North Carolina at Chapel Hill and a degree in international law from the University of Amsterdam, Mr. Allen began a successful legal career in 1974.

He eventually opened his own firm, Allen & Pinnix, where he serves as President and Managing Partner. He has expertise in antitrust, public policy, administrative, trade regulation, and international law.

Mr. Allen has been recognized by "The Best Lawyers in America," named a "Legal Elite" and "North Carolina Super Lawyer" by Business North Carolina magazine, and received the North Carolina Bar Association's International Law Service Award.

Information and photo courtesy of Elon University.

## **2024 CPA EXAM TESTING AND SCORE RELEASE DATES**

| Exam Section             | Testing Dates         | lf the AlCPA Receives<br>Your Exam Data<br>File By*: | Your Target Score<br>Release Date Is: |  |
|--------------------------|-----------------------|--|---------------------------------------|--|
| Exam Core Sections       |                       |  |                                       |  |
| AUD, FAR, REG            | 01/10/2024-03/26/2024 | 03/26/2024   | 06/04/2024                            |  |
|                          | 04/01/2024-06/25/2024 | 06/25/2024   | 07/31/2024                            |  |
|                          | 07/01/2024-09/25/2024 | 09/25/2024   | Approx. 11/02/2024                    |  |
|                          | 10/01/2024-12/26/2024 | 12/26/2024   | Early 02/2025                         |  |
| Exam Discipline Sections |                       |  |                                       |  |
| BAR, ISC, TCP            | 04/20/2024-05/19/2024 | 05/19/2024   | 06/28/2024                            |  |
|                          | 07/01/2024-07/31/2024 | 07/31/2024   | 09/11/2024                            |  |
|                          | 10/01/2024-10/31/2024 | 10/31/2024   | 12/11/2024                            |  |

Dates are tentative and subject to change. Follow @NASBA on X for score release updates. \*Exam data files received after this date will be included in the next scheduled score release.

North Carolina State Board of Certified Public Accountant Examiners

### **CPA Certificate Reclassifications**

| Reinstatement   |   | CPA-retired Status   |  |
|---|---|--|--|
| On April 24, 2024, the Board approved the following applications for certificate reinstatement:   |   | Between April 1 and April 30, 2024, the Board approved the following applications for CPA-retired status:  |  |
| Jamie Hill Connotillo, #27526<br>Rachel Christina Luckhardt, #38555<br>John William Ward III, #20138  | Mooresville, NC<br>Greensboro, NC<br>Eden, NC | Heather Davis Benson, #20696<br>Stephen Allen Briley, #11277<br>Michael Eugene Burch, #14288<br>Howard Kenneth Dickson Jr., #15980                                     | Greensboro, NC<br>Madison, GA<br>Summerfield, NC<br>Southern Pines, NC                         |
| Reissuance  |   | Dale Lynn Horner, #14868GiBarbara Mobley Kuley, #20935GiAngela Gail Lane, #23492StMiriam Cohen Levine, #36365HiPamela Simmons Morine, #20449WDavid M. Patton, #15314Ch | Greensboro, NC   |
| On April 24, 2024, the Board approved the following<br>applications for certificate reissuance:<br>Lenvil Allen Coltrane, #45713 Huntersville, NC<br>Linell Deln Johnson, #30108 Kernersville, NC |   |  | Garner, NC<br>Stanley, NC<br>Hertford, NC<br>Wilmington, NC<br>Charlotte, NC<br>Greensboro, NC |

#### **Inactive Status**

Between April 1 and May 15, 2024, the Board approved the following applications for inactive status:

Linda Clifton Aldridge, #19476 Martin Wright Amerson, #14278 Amanda Susan Anghaie, #40284 Matthew Joseph Ashman, #42443 Donovan Glenn Bachtell, #34515 Wade Martin Benson, #22344 John Holmes Berngartt, #19366 Cynthia Bisher Brown, #20507 Taylor Lauren Brown, #44830 Stephen Chen, #43525 Larry Stephen Coffield, #9676 Stephen James Cole, #45178 Kathryn Leah Heyward, #25421 Charles Frederick Cornett, #42020 Gerald Love Cox, #23163 Kris Harris Cox, #19736 David L. Currie, #21725 Melba Weddington Daniels, #16273 Alan Day, #15632 Michael Francis DeFalco, #28747 Kari Dewberry, #36807 Mary Alayne Ferguson, #30147 Theresa Ann Fowler, #41125 Ashton Connor Glenn, #45367 David Ray Goodson, #17638 Denise Graham, #30423 Diane Moore Graham, #15203 Judy Thomas Gray, #44402 Michelle Denise Hall, #25815 Mary Elizabeth Hamilton, #43006 John Weiss Harris, #4089 Kathryn Smith Hart, #9776 Lisa Herman, #23408 Jacob Edwin Hoyle, #43928 Yu-Mong Hsiao, #21594 Susan Shook Hyder, #13358 Edwin J. Jaklitsch, #31838 David Wayne Jessen, #16918 Spencer Christian Johnson, #45378

Yanceyville, NC Wilson, NC Tampa, FL Charlotte, NC Southern Pines, NC Hayesville, NC Chapel Hill, NC Johns Island, SC Greer, SC Carrollton, TX Sunset Beach, NC Charlotte, NC Denham Springs, LA Charlotte, NC New Bern, NC Charlotte, NC Parkersburg, WV Charlotte, NC San Antonio, TX Lake Charles, LA Wake Forest, NC Williamsville, NY Cornelius, NC Oakland, CA Charlotte, NC Swansea, SC Greensboro, NC Niceville, FL Raeford, NC Fort Mill, SC Dallas, TX Raleigh, NC Chapel Hill, NC Charlotte, NC Buies Creek, NC Hickory, NC Greensboro, GA Raleigh, NC Maryville, TN

Janet Lee Joyner, #23042 Gurpreet Kaur, #41351 Jeanette Marie Kuchenreuther, #21146 Brittany Nicole Layton, #44114 Lora Hanna Benfield, #18372 John Hartley Lunsford, #18951 Benjamin Lawrence Maddrey, #13511 John Russell Madray, #18429 Kassandra Fay Mangano, #46502 James William Matthews Jr., #16883 Kaela Nicole Matthews, #46812 Michael Patrick Mattimore, #38979 Allen Justin Maxwell Jr., #17048 Jennie Lee McDaniel, #46214 Alexandra Lee McFadden, #45921 Thomas Carl Morton, #17918 William Lyman Orr, #12573 Jeanne Sears Perkins, #27403 Mary Elizabeth Powell Broyles, #32315 Sereita Ann Powers, #13749 Edward Neil Renner, #31296 lason Michael Richardson, #34967 Alice Kay Satterfield, #19440 lia Song, #44438 Linda Ann Winslow Speary, #17867 William Kendrick Springs, #32693 Ben Sternberg Jr., #20240 Robert V. Sytz Jr., #14766 Todd Allen Taylor, #26290 Joan Carol Thomas, #39355 Nancy Lee Thompson, #29571 Judith Taylor Von Thron, #13666 Iohn Robert Weatherford, #45806 Kristine Wehn, #43164 Susan T. Williams, #28332 Teresa Lee Williams, #28474 Vera Lynn Wood, #41038 John Louie Yilling, #15957

Vance Bunting Taylor, #3516

Mt. Olive, NC Durham, NC Raleigh, NC Cleveland, OH Maiden, NC Raleigh, NC Greensboro, NC Provincetown, MA Huntersville, NC Atlantic Beach, NC Simpsonville, SC Greenville, SC Charlotte, NC Beebe, AR Fort Moore, GA Greensboro, NC Winston-Salem, NC Dobson, NC Raleigh, NC Richmond, VA Pinehurst, NC Charlotte, NC Roxboro, NC Miami, FL Edenton, NC Terrell, NC Greensboro, NC Charlotte, NC Rockledge, FL Roanoke, VA Waynesville, NC Brentwood, TN Asheville, NC Charlotte, NC Chapel Hill, NC Rural Hall, NC Harkers Island, NC Wendell, NC

Farmville, NC



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> Other Legal Counsel Noel Allen, Esq.

# **Dates to Remember**

Dates, times, and locations are subject to change.

| May 27, 2024    | Office Closed  |
|-----------------|--|
| June 19, 2024   | Office Closed  |
| June 24, 2024   | Board Meeting, Raleigh                                       |
| June 30, 2024   | Deadline: Individual CPA License Renewal for 2024-2025       |
| July 4, 2024    | Office Closed  |
| July 22, 2024   | Board Meeting, Chapel Hill                                   |
| July 31, 2024   | Final Deadline: Individual CPA License Renewal for 2024-2025 |
| August 19, 2024 | Board Meeting, Raleigh                                       |
| Sept. 2, 2024   | Office Closed  |
| Sept. 23, 2024  | Board Meeting, Hickory                                       |
| October 21      | Board Meeting, Raleigh                                       |
| November 11     | Office Closed  |
| November 18     | Board Meeting, Raleigh                                       |
| November 28-29  | Office Closed  |

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The North Carolina State Board of CPA Examiners can be found on popular social media networks, such as Facebook, LinkedIn, Instagram, and X.

