



North Carolina State Board of Certified Public Accountant Examiners

PUBLIC SESSION MINUTES

June 22, 2026

BOARD MEMBERS IN ATTENDANCE: Jodi K. Kruse, CPA, President; D. Michael (Mickey) Payseur, CPA, Vice President (via Webex); Ulysses Taylor, CPA, Esq., Secretary-Treasurer; James T. Ahler, CAE; Tammy F. Coley, CPA; Maria M. Lynch, Esq.; and Kecia Williams Smith, Ph.D., CPA.

BOARD STAFF IN ATTENDANCE: David R. Nance, CPA, Executive Director; S. Lynne Sanders, CPA, Deputy Director; Frank Trainor, Esq., Staff Attorney; and Lisa Hearne-Bogle, Communications Officer.

OTHERS IN ATTENDANCE: Noel L. Allen, Esq., Board Legal Counsel; Robert Broome, NCACPA Vice President of Advocacy & Outreach; Rick Parrish, CPA, NCACPA Board Member; Dr. Joseph Reid; Mark Sotichack, CPA, NCACPA CEO; and Lt. J.A. Stokes, Raleigh Police Department.

CALL TO ORDER: Ms. Kruse called the meeting to order at 10:00 a.m. and stated that with seven Board members in attendance, a quorum was present.

CONFLICT OF INTEREST: Mr. Taylor and Dr. Smith recused themselves from an item on the Professional Education and Applications Committee agenda.

APPROVAL OF AGENDA: Mr. Taylor moved to approve the agenda, and Ms. Coley seconded the motion. The motion passed with seven votes in favor, and none opposed.

MINUTES: Ms. Lynch moved to approve the May 18, 2026, meeting minutes, and Dr. Smith seconded the motion. The motion passed with seven votes in favor, and none opposed.

FINANCIAL AND BUDGETARY ITEMS: Mr. Ahler moved to approve the May 2026 financial statements, and Mr. Taylor seconded the motion. The motion passed with seven votes in favor and none opposed.

LEGISLATIVE AND RULEMAKING ITEMS: Mr. Nance reported that the Office of Administrative Hearings approved the Board's rules on May 28, 2026, with an effective date of June 1, 2026.

NATIONAL ORGANIZATION ITEMS: Several Board members shared their impressions of the NASBA Eastern Regional Meeting held June 8-11, 2026.

Mr. Nance stated that Arthur M. Winstead, Jr., CPA, was unanimously elected to serve on the NASBA Nominating Committee.

PROFESSIONAL STANDARDS COMMITTEE REPORT: The Board approved, with seven votes in favor and none opposed, the following Committee report presented by Ms. Lynch:

Ms. Lynch stated that the Committee provided guidance to the staff on nine items.

PROFESSIONAL EDUCATION AND APPLICATIONS COMMITTEE REPORT: The Board approved, with seven votes in favor and none opposed, the following Committee recommendations presented by Dr. Smith:

Application for Original CPA Certificate - Approve the following applications for original North Carolina CPA licensure:

Dayelin Fabiola Anuel
Matthew Harrison Wagner

Isabelle Mary White

Application for Temporary Permit - Approve the following temporary permits approved by the Deputy Director:

Lisa Jo Summerbell T15671
Jessica Reber Hanus T15672
Kayla Renae Harmon T15673
Amy Coleman Meisser T15674
Julia Bernice Liddle T15675
James Timothy Sparks T15676
Matthew David Horn T15677
Michelle Elaine McKinley T15678
Thomas Adam Bonfiglio T15679
William Bruce Dickson T15680

Matthew James Becker T15681
Christopher Michael Barnes T15682
Timothy Michael Trampe T15683
Wayne Gerald Brett T15684
Thomas Ashcraft Sherrill T15685
Duncan Ryan Kneeland T15686
Betty Jean Sears T15687
Monika Esther Schwall T15688
Brandon Andrew Davis T15689

Application for Reciprocal CPA Certificate - Approve the following applications for reciprocal CPA certification:

Hareesha Karunaratne Boyagodage
Matthew Wayne Halpern

James Ottis Dean Swindle Jr.

Application for Reissuance of CPA Certificate - Approve the following application for CPA certificate reissuance:

Joseph Denard Reid, #36846

Dr. Smith and Mr. Taylor recused themselves from the discussion of this matter.

CPE Extension Requests - Approve four requests for an extension to complete the 2025 CPE requirement before June 30, 2026, without penalty.

Applications for Uniform CPA Exam - Approve the following applications to sit for the Uniform CPA Exam as a North Carolina candidate:

Sirish Acharya
Sarah Alexander
Jacob Alge

Yesmine Alston
Robert Amaye-Obu
Erin Askew

Walker Austin
Natalie Auwn
Joseph Badalamenti
Julie Ann Bailey
Andrew Baker
Hattie Baldock
Melissa Banks
Meghan Barefoot
Tyler Barker
Tyler Barwise
Jason Bauer
Anthony Bedell
Philip Benke
Jonathan Benthall
Helaynee Benzie
Debarpita Bhattacharya
Henry Black
Anna Blackburn
Tanner Blackwell
Amanda Bodden
Cooper Bodford
Edward Bogen
Sandra Bojar
Cameron Boothby
Chloe Borchers
Ronald Borcky
Andrew Bowman
Keifer Boyd
Reagan Bradham
Grahm Breiter
Ekua Brew
Ethan Bright
John Brightman
Molly Brohaugh
Eric Brown
Mark Bruce
Ethan Brunelli
Herbert Bryan
Matthew Buck
Gilley Bunting
Paige Burker
Joseph Burroughs
Katherine Cadungog
Xuanle Cai
Anna Caldwell
Amanda Campbell

Jonah Carlson
Kristen Cart
Hannah Carte
Kevin Cascante
Jil Chang
Peter Chege
Xavier Chester
Matthew Chiappetta
Margaret Clark
Sydney Clark
Cara Clippinger
Kevin Coffman
Amber Collins
Noah Combs
Kylie Conlon
Aidan Connolly
Abigail Cook
Ryin Corcoran
Katherine Cox
Meagan Cox
Mikaela Critides
Robert Cromley
Nicholas Cummings
Grace Cunnane
Justin Cunningham
Allison D'Aprile
Stephen Dallara
Mara Dameron
Brian Dampman
Drew Danner
Ayman Darwish
Alexandra Davis
Laura Davis
Sophia Davis
Andrew De Martino
Luke DeFranco
Adrien Depace
Alicia Desjardins
Raed Dib
Lucy Dixon
Travis Dixon
Jay Dodge
Ryan Donahue
Emily Dudley
Shania Duncombe
Ryan Durham

Peyton Eckersley
Alec Edens
Caleb Edwards
Aaron Eller
Hannah Ellis
Koler Ellis
Denisha Emerson
Kristin English
Caroline Epley
Marcus Espeland
Megan Evans
Shawn Evans
Matthew Faircloth
Daniel Fischer
Ashley Fleming
Gavin Foley
Kaitlyn Frey
David Gabrick
Travis Gallup
Adolfo Galvan-Fermin
Josmar Garcia Jimenez
Camilo Gomez
Eudelia Gomez
Joshua Gonzalez
Connor Gordon
Benjamin Gorman
Daniel Gorodisch
Annika Grace
Hannah Grady
Casey Graham
Troy Greene
Nathanael Grubb
Julian Guajardo
Caitlin Guzik
Tristian Gwynn
Andrew Ha
William Hackley
Jarrett Hamlin
Madison Hanan
Heidi Harlan
Austin Harris
Joshua Harris
Joy Harris
Rayquan Harris
Uniqua Harris
A'vaja Harris-Simmons

Brooklin Heavner
Sophie Heinan
Rebekah Helmer
Alexa Hennen
William Herman
Mauro Hernandez
Emily Herne
Katherine Hodges
Katie Holding
Camden Hollar
Kelly Hopkins
Lydia Huggins
Noah Hughes
Katelyn Hulst
Brandon Hunter
Mason Hutchinson
Joseph Huynh
Kylee Hynes
Keno Ivri Ivri
Chinyere Iwuchukwu
Artanzia Jackson Yates
Naylea Jacobo
Zachary Jagielski
Colby James
Christian Jeffries
Shanette Jenkins
Kyler Jessup
Ayesha Johnson
Carter Johnson
Sterling Johnson
Daniel Jolly
Brenda Jones
Cameron Jones
Dylan Jones
Lauren Jones
Steven Jordan
Thomas Kahila
Meredith Kaiser
Brittney Kamphuis
Sevcan Karahan
Bryn Keeffe
John Kelley
Dylan Kennedy
Grace Kenney
Magda Khalil
Elizabeth Kim

Jordan King
Bradford Kirkland
Daniel Knott
Daniel Kobos
Rosslyn Koch
Alexander Koester
Erin Krauth
Katherine Kulas
Sophia Kurtz
Paul Kwiatkowski
Katherine Lam
James Lambert
Alexander LaMothe Toland
Connor Langley
Emma Lanier
Alexandria Latorre
John Lawson
Maxwell Leftwich
Andrew Lerro
Michael Liebler
Joshua Liggett
Xueying Lin
Ceui Ling
Josiah Linton
Samantha Lockamy
Wilson Lohmann
Carter Losee
Andrea Loyd
Hayden Lunenfeld
Abigail Lux
Janine Mahoney
Evan Maitland
Viktor Maltsev
Mingfei Man
Patricia Marte Rafael
Cole Martin
Juan Pablo Martinez Romero
Daniel Martinez-Sanchez
Mason Matthews
Timothy May
Austin Mazankowski
Christian McCaffrey
Macy McDaniel
Matthew McDaniel
Anthony McDermott
Elizabeth McDonnell

Brady McElheny
Connor McEwen
Thomas McGowan
Erin McLaughlin
Meghan McLawhorn
Sydney Meacham
Malik Medley
Jovani Mendez-Sandoval
Kaitlyn Mesimer
Jack Milligan
Qui'Ana Monroe
Rosio Montalvo Rios
Brylee Montanari
Collin Montgomery
Troy Moore
Jillian Morgan
Kendall Murray
Rachael Murray
Richard Musselwhite
Gracie Myers
Grant Myers
Sai Laasya Narreddi
Luke Natenstedt
Virginia Newton
Rachel Nguyen
Andrew Nielson
Kristin Nix
Drew Nora
Matthew Norby
Ian Norris
Connor O'Brien
Ansley O'Keefe
Jessica O'Neill
Jack O'Sullivan
Daniel Oakley
Andrew Obimma
Amelia Oliver
Edna Orellana
Brendan Outlaw
Aaron Owens
Jessica Parks
Izabela Paszek-Crayton
Dristi Patel
Melissa Peaks
Katelyn Pearson
Jakeman Pendleton

Karla Perez
Kate Perruccio
Kathryn Perry
Madison Peters
Christina Phillips
Abigail Pierce
Blake Pierce
Marshall Pile
Alexa Plate
Liam Poole
Jenna Porter
Caleb Prado
Cassandra Pratt
Elizabeth Quinn
Kinlie Rackard
Erin Rafferty
Whitney Ragland
Rebecca Rascon
Anthony Recinos Argueta
Ethan Redden
Leon Reid
Nathan Reitz
Caroline Richardson
Melissa Riddle
David Rieth
Robert Riggs
Candace Ring
Ty Ritchie
Isaac Roberts
Quanaisha Rodgers
Breanne Rodino
Ashley Rodriguez
Meghan Rogers
Nidia Rosa
Meagan Rowley
Derek Royster
Caroline Rueckel
Sylvia Ruff
Leanne Rupp
Allyson Russell
Warren Sackett
George Saffo
Jordan Salisbury
Cristina Sanchez
Debbie Satur
Lokesh Satyal

Jasmine Saucedo
Sarah Schoen
Sean Seaberg
Trenton Seibert
Kaytlin Shaver
Grant Sherer
Avery Shope
Paul Silverstein
Jacob Simpson
Justin Sledge
Celina Smith
Hannah Smith
Kayla Smith
Lauren Smith
Noah Smith
Brian Smithwick
Juliana Snoke
Lukas Sobocinski
Landon Speer
Bailey Spell
Neal Spencer
Paige Spicer
Samuel Spigarelli
Victor Spinache
David Stephens
Ryan Strube
Faires Stutts
James Suggs
Leah Sullivan Johnson
Matthew Sutton
Gus Svendsgaard
Jason Swierc
Steven Swierkowski
Carson Talboys
Hudson Taylor
Santora Taylor
Jonathan Thomas
Nathalia Thomas
Matthew Thompson
Nicholas Thompson
William Tierney
Joseph Tully
Tanner Tweedy
Joshua Tyree
Segilola Udofia
Ella Underwood

Jeremy Urso
Hailey Van Stralen
Thomas Vaughn
Yaritza Ventura
Lauren Verner
Lucas Votaw
Kiara Wade
Kristin Wagoner
Timothy Walker
Sarah Wallace
Steven Warner
Kellie Warren
Lanett Washington
Leah Wells
Madalyn Wells
Sandy Wheless
Abigail White

Malique William
Ashlyn Williams
Gary Williams
Grantham Williams
A'shia Williamson
Reese Willie
Eleanor Wilson
Khendra Witt
Bray Woodard
Kendel Woods
Danielle Wren
Lindsey Wright
Trevor Yoash
Jie Zhao
Sulan Zhu
Jaime Ziegenfuss Whitehead
Kyle Zylowski

Miscellaneous - The Committee reviewed and approved the education submitted with a license application.

The Committee reviewed and approved the updated charter of the Professional Education and Applications Committee.

EXECUTIVE STAFF AND LEGAL COUNSEL REPORT: The Board reviewed the May 2026 operational metrics and the June 2026 Executive Staff Report.

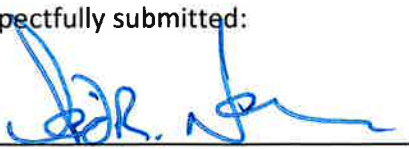
RECOGNITION OF NC CPA LICENSURE MILESTONES: Ms. Kruse directed the staff to send a Certificate of Recognition to the following individuals who have held an active North Carolina CPA license for 50 or more years as of June 2026:

Name	Years of Licensure
Steven Eric Bowman, #9312	50
Sylvester Benjamin Hebert, #9395	50
William Alexander Livingstone Jr., #9305	50
E. Dean Duncan, #7805	52
Ozro Douglas Covington, #7224	53
William Marshall Faircloth, #7216	53
Dorn Carl Pittman Jr., #7223	53
Charles Edwin Killian, #6112	54
Jane Michael Worley, #4264	55
Tom R. Blacka, #3415	57

PUBLIC COMMENTS: Mr. Sotichack shared a summary of the NCACPA's recent and upcoming activities, and Mr. Broome provided a legislative update.

ADJOURNMENT: Mr. Taylor moved to adjourn the meeting at 10:53 a.m., and Ms. Coley seconded the motion. The motion passed with seven votes in favor and none opposed.

Respectfully submitted:



David R. Nance, CPA
Executive Director

Attested to by:



Jodi K. Kruse, CPA
President