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OCCUPATIONAL LICENSURE

**Public Meeting Minutes  
September 16, 2021**

**Board Members Present:**

Angela Parziale, CPA, MST, *Chair*  
Randall S. Davis, CPA, *Secretary*  
Richard H. Grueter, CPA, *Member*

**Staff Members Present:**

Danielle O'Neil *Executive Director*  
Lynn Read, *Board Counsel*

**Board Members Absent:**

Emerald Wong, *Public Member*

Pursuant to Governor Charles D. Baker's Executive Order Suspending Certain Provisions of the Open Meeting Law, G.L. c. 30A, s. 20, dated March 12, 2020, all board members and staff appeared by videoconference.

**Call to Order:** The meeting was called to order at 10:03 a.m. by Ms. Parziale.

**Board Business**

**Public Meeting Minutes of August 19, 2021:** After a brief discussion, a decision was made to TABLE the meeting minutes.

**2022 Board Meeting Schedule:** After a brief discussion a MOTION was made by Mr. Davis to APPROVE the 2022 Meeting schedule, seconded by Mr. Grueter. The motion passed unanimously by a roll call vote

**Board Counsel Report**

- **Mobility Update:** Lynn Read reports that we are still in the process of reviewing the policy and will have an update at the October meeting.

**CPA Examination Credit Extension Requests**

- **Casey Monahan:** After a brief discussion, a MOTION was made by Mr. Davis, seconded by Mr. Grueter, to extend Mr. Monahan's REG credits to 10.21.2021. The motion passed unanimously by a roll call vote.



### **Application Review**

- 2021-59-CA-SE-APP [Andrew Hay] After a brief discussion, a MOTION was made by Mr. Davis, seconded by Mr. Grueter , to allow Mr. Hay’s application to move forward. The motion passed unanimously by a roll call vote
- 2020-55-CA-SE-APP [Jennifer Wray], After a brief discussion, a MOTION was made by Mr. Davis, seconded by Mr. Grueter , to allow Ms. Wray’s application to move forward if additional information is submitted. The motion passed unanimously by a roll call vote

### **Topics Not Reasonably Anticipated 48 Hours in Advance of Meeting:** None

### **Adjourn Public Meeting, Enter Executive Session, and then Enter Investigative Conference**

*(Closed Executive Session under G.L. c. 30A, s. 21(a)(7) to comply with G.L. c. 4, s. 7, para. 26(c) and G.L. c. 214, s. 1B, and then to enter Closed Investigative Conference under G.L. c. 112, s. 65C)*

At 10:32 a.m., a MOTION was made by Mr. Davis seconded by Mr. Grueter, to: (1) exit the public meeting; (2) enter into a closed executive session under G.L. c. 30A, s. 21(a)(7) to comply with G.L. c. 4, s. 7, para. 26(c) and G.L. c. 214, s. 1B to review sensitive medical information in CPA Examination extension requests; (3) then enter into a closed investigative conference under G.L. c. 112 s. 65C; and (4) then, after investigative conference, not return to the public meeting. The motion passed unanimously by a roll call vote.

See separate minutes of Executive Session.

### **Investigative Conference** *(Closed Session under G.L. c. 112, s. 65C)*

The Board entered investigative conference at 10:32 a.m.

During the investigative conference, the Board took the following actions:

**PCAOB**

**No Action**

**AICPA**

**Refer to Investigations**

### **Adjournment**

At 10:41 a.m., a MOTION was made by Mr. Davis, seconded by Mr. Grueter, to adjourn the meeting. The motion passed unanimously by roll call vote.

The meeting adjourned at 10:41 a.m.

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Danielle O'Neil, Executive Director

**List of Documents Used by the Board at the Open Meeting:**

- 2022 Board Meeting Schedule
- Draft Policy Regarding Practice by Individuals Licensed in Other States
- Credit Extension request from Casey Monahan
- Application for 2021-59-CA-SE-APP [Andrew Hay]
- Application for 2020-55-CA-SE-APP [Jennifer Wray]