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REGULATION

SARAH R. WILKINSON
COMMISSIONER, DIVISION OF
OCCUPATIONAL LICENSURE

Board of Public Accountancy
Public Meeting Minutes
July 17, 2025

Board Members Present:

Richard H. Grueter, CPA, *Chair*
Lunetta Kwan, CPA, *Secretary*
Angela Parziale, CPA, MST, *Member*
James Redmond, CPA, *Member*

Staff Members Present:

Kerry Cassidy, *Executive Director*
Jennifer Fraga, *Program Coordinator*
Lynn Read, *Board Counsel*

All Board Members and staff appeared by video conference.

CALL TO ORDER: The meeting was called to order at 10:01 a.m. by Executive Director Kerry Cassidy.

BOARD BUSINESS:

Public Meeting Minutes of February 20, 2025.

Executive Session Meeting Minutes of February 20, 2025.

Public Meeting Minutes of May 15, 2025.

Executive Session Public Meeting Minutes of May 15, 2025.

Public Meeting Minutes of June 24, 2025.

The draft minutes were not available for review. A MOTION was made by Mr. Redmond to table all draft minutes until the next meeting, seconded by Ms. Kwan. The Motion passed unanimously by a roll call vote.

BOARD COUNSEL REPORT:

Public Hearing on Proposed Regulations 252 CMR 2.00 To Be Held 8/21/25

Board Counsel Lynn Read reported that the Notice of Hearing and draft regulations were filed with the Secretary of State's Office. The Public Hearing on the proposed regulations has been scheduled for August 21, 2025, at 9:00 a.m. The notice will be published on mass.gov and various other platforms.



DISCUSSION:**2026 NASBA Exam Fee Implementation.**

Read and filed.

APPLICATION REVIEW:

None

Open Session for Topics Not Reasonably Anticipated by the Chair 48 Hours in Advance of Meeting:

Executive Director Kerry Cassidy brought forth a question regarding a proposed firm name using the initials of the first and last name of the owner. The Board discussed the regulation on fictitious names and made notes to revisit the regulation for possible review and revision at later time.

Board Chair Mr. Grueter reported that he virtually attended the East Regional NASBA meeting where he learned that there has been an increase in the spring of 2025 and fall enrollment trends. Mr. Grueter noted that the newly implemented initiatives seem to be working but more effort will be needed.

Adjourn Public Meeting, Enter Executive Session (Closed) under G.L. c. 30A, s. 21(a)(7) to comply with G.L. c. 66, s. 10, G.L. c. 4, s. 7, para. 26(c) and G.L. c. 214, s. 1B (medical record information), and then Investigative Conference (Closed under G.L. c. 112, s. 65C).

At 10:38 a.m., a MOTION was made by Ms. Parziale, seconded by Mr. Redmond, to: (1) exit the public meeting; (2) enter a closed executive session under G.L. c. 30A, s. 21(a)(7) to comply with G.L. c. 66, s. 10, 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 and applications; (3) then enter closed Investigative Conference under G.L. c. 112 s. 65C; and not return to the public meeting except to adjourn. The Motion passed unanimously by a roll call vote.

See separate minutes of Executive Session.

Investigative Conference CLOSED under G. L. c. 112, § 65C

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

Settlements:

None

Cases:

2025-000486-IT-ENF	Dismissed with an Advisory
2025-000467-IT-ENF	Refer for Prosecution
2025-000430-IT-ENF	Dismissed with an Advisory
2025-000417-IT-ENF	Refer to Prosecutions
2025-000125-IT-ENF	Dismissed
2024-000975-IT-ENF	Tabled

CPE Audit:

2025-200918-FI-ENF	CE Approved, Dismissed with Advisory
2025-200921-FI-ENF	CE Approved, Dismissed with Advisory
2025-200368-FI-ENF	CE Approved
2024-207895-FI-ENF	CE Approved
2024-207351-FI-ENF	CE Approved
2024-204535-FI-ENF	CE Approved
2024-204533-FI-ENF	CE Approved, Dismiss with Advisory

Settlements:

2023-000619-IT-ENF

Read & filed.

AICPA:

Read & filed.

PCAOB:

Read & filed.

ADJOURNMENT

At 1:20 p.m., a MOTION was made by Mr. Redmond, seconded by Ms. Parziale to adjourn the meeting. The motion passed unanimously by roll call vote.

The above minutes were approved at the public meeting held on November 20, 2025.



Kerry Cassidy, Executive Director

List of Documents Used by the Board at Open Meeting:

None