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Public Meeting Minutes
May 20, 2021

Board Members Present:

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

Staff Members Present:

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

Board Members Absent:

None

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 10:08 a.m. by Ms. Parziale.

Board Business

- **Public Meeting Minutes of April 22, 2021:** After a brief discussion, a MOTION was made by Mr. Davis, seconded by Mr. Grueter, to approve the Public Meeting Minutes of April 22, 2021. The motion passed unanimously by a roll call vote.
- **Executive Session Minutes of April 22, 2021:** After a brief discussion, a MOTION was made by Mr. Davis, seconded by Mr. Grueter, to approve the Executive Session Minutes of April 22, 2021 with no changes. The motion passed unanimously by a roll call vote. .

Discussion

- **Policy Regarding Practice by Individuals Licensed in Other States:** Ms. Read presented a final policy to clarify individual licensee mobility, however firm mobility has come into question. After a brief discussion, a MOTION was made by Mr. Grueter, seconded by Mr. Davis to TABLE the Policy as written. The Motion passed unanimously by a Roll Call vote



Petition for Termination of Suspension – Interview

- **John Strickland:**

After a brief discussion, a motion was made by Mr. Grueter, seconded by Mr. Davis, to APPROVE Mr. Strickland's petition to terminate suspension.. The Motion passed unanimously by a roll call vote.

CPA Examination Credit Extension Requests

- **Siyuan Luo:** After a brief discussion, a MOTION was made by Mr. Davis, seconded by Ms. Wong , to extend Ms. Luo's REG credits to December 1, 2021. The motion passed unanimously by a roll call vote.
- **Meghan Albert:** After a brief discussion, a MOTION was made by Mr. Davis, seconded by Mr. Grueter , to extend Ms. Albert's BEC credits to June 1, 2021. The motion passed unanimously by a roll call vote.
- **James Mai:** The board reviewed Mr. Mai's request and determined this candidate is not our jurisdiction
- **Tomas Alessandro Pueyo:** After a brief discussion, a MOTION was made by Mr. Davis, seconded by Ms. Parziale , to extend Mr. Alessandro Pueyo's REG credits to March 19, 2021. The motion passed unanimously by a roll call vote.
- **Yijie Zhang:** After a brief discussion, a MOTION was made by Mr. Davis, seconded by Mr. Grueter , to extend Ms. Zhang's REG to January 15, 2022. The motion passed unanimously by a roll call vote.
- **David Dumont:** After a brief discussion, a MOTION was made by Mr. Davis, seconded by Ms. Parziale, to extend Mr. Dumont's AUD to September 1, 2021. The motion passed unanimously by a roll call vote.
- **Timothy LaFalam:** After a brief discussion, a MOTION was made by Mr. Davis, seconded by Mr. Grueter , to extend Mr. LaFalam's BEC to March 9, 2021. The motion passed unanimously by a roll call vote.
- **Samantha Haroian:** After a brief discussion, a MOTION was made by Mr. Davis, seconded by Mr. Grueter, to extend Ms. Haroian's FAR to September 5, 2021. The motion passed unanimously by a roll call vote.

Topics Not Reasonably Anticipated 48 Hours in Advance of Meeting

There were no unanticipated topics or comment by the public.

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

(Closed Executive Session under G.L. c. 30A, ss. 21(a)(1) and 21(a)(7) to consider character rather than competence and 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 11:03 a.m., a MOTION was made by Mr. Grueter seconded by Ms. Wong, to: (1) exit the public meeting; (2) enter into a closed executive session under G.L. c. 30A, s. 21(a)(1) and 21(a)(7) to consider character rather than competence and 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.

Executive Session *(Closed under G.L. c. 30A, s. 21(a)(1) and 21(a)(7) to consider character rather than competence and 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)*

See separate Minutes

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

The Board entered investigative conference at 11:58 a.m.

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

Interview with PWC: No Action Taken

PCAOB **No Action**

AICPA **No Action**

Complaints:

2021-001000-IT-ENF	Refer To Prosecution
2021-000203-IT-ENF	Refer To Prosecution

Adjournment

At 2:34 p.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 2:34 p.m.

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

- Meeting Agenda of May 20, 2021
- Public Meeting Minutes of April 22, 2021
- Executive Session Minutes of April 22, 2021
- Petition for Termination of Suspension of John Strickland
- Draft Policy Regarding Practice by Individuals Licensed in Other States
- Credit Extension request from Siyuan Luo
- Credit Extension request from Meghan Albert
- Credit Extension request from James Mai
- Credit Extension request from Tomas Alessandro Pueyo
- Credit Extension request from Yijie Zhang
- Credit Extension request from David Dumont
- Credit Extension request from Timothy LaFalam
- Credit Extension request from Samantha Haroian