

Occupational and Professional Licensing
District of Columbia Board of Accountancy
1100 4th Street, SW Suite 400
Washington, DC 20024



Meeting Minutes
February 07, 2025

*****This meeting is governed by the Open Meetings Act. Please address any questions or complaints arising under this meeting to the Office of Open Government at opengovoffice@dc.gov***

The District of Columbia Board of Accountancy (Board) held its regularly scheduled meeting on Friday, February 07, 2025. This was a virtual meeting.

The meeting was called to order at 9:09 a.m. by Board Chair, Robert Todero, and attendance taken.

Board Members Present: Robert Todero, Dr. Joseph Drew, Antonia Browning Smiley and Jason Danielson.

Board Members Absent: (None)

Staff Present: Angela Meggett-Strudwick, Board Administrator; Kevin Cyrus, Education Coordinator, joined (9:19 am); Jacqueline Noisette, Deputy Associate Administrator, A'layza Mitchell, Program Support Specialist, OPL; Demetrius Norman, Chief Customer Experience Officer, Office of the Director

Legal Counsel: Jessica Rice, Attorney Advisor; Jennifer Durdan, Paralegal

Public Consumers Present: Kari Bedell, Greater Washington Society of CPAs (GWCPAs)

Agenda Item: Comments from the Public:

Ms. Bedell stated that the (GWSCPAs) advocates for a bachelor's degree plus 2 years of general experience as an alternate pathway to licensure. They are also supportive of protecting mobility for licensees across jurisdictions.

Agenda Item: Legislative Rule Making

Legislative Update – CPA Experience Pathways & Regulatory Steps – Jessica Rice gave a brief update to the Board regarding the legal team's progress. The amendments to the Budget Support Act by the agency will not be going through this year. The rulemaking is currently delayed with an update to come by April Randall, Legislative and Public Affairs Officer.

Agenda Item: New Business

None

Agenda Item: Acceptance of Draft Minutes

Upon motion duly made at 9:28 a.m. by board member Joseph Drew, and properly seconded by board member Antonia Browning Smiley, the board voted to approve the December 20, 2024, draft board meeting minutes. Jason Danielson abstained because he was not present at the December meeting.

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Agenda Item: Report - Applications for Licensure

Licensees were not approved during the meeting. Must approve next meeting, March 7, 2025.

Agenda Items: 2025 NASBA Conferences/Meetings & Events Calendar

Upcoming Events

30th Annual Conference for Board of Accountancy Legal Counsel - March 25-27, 2025, Clearwater Beach, FL

43rd Annual Conference for Executive Directors & Board Staff - March 25-27, 2025, Clearwater Beach, FL

Western Regional Meeting - June 17-19, 2025, New Orleans, LA

Eastern Regional Meeting - June 24-26, 2025, Philadelphia, PA

118th Annual Meeting - Oct. 26-29, 2025, Chicago, IL

The DC Board unanimously voted to approve the attendance for board members, board staff, and legal counsel, to all 2025 listed conferences in the February 7, 2025 Board meeting.

“Reserve the date”

March 25-27, 2025, 43rd Annual ED Conference & 30th Annual Conference for BOA Legal Counsel

-Board Administrator & Advisory Attorney will attend.

Proposed 2025 Board Meeting Dates – The scheduled board meeting dates and upcoming conferences as listed.

January (Recess)	February 7	March 7	April (Recess)
May 2	June (Recess)	July 11	August (Recess)
September 5	October (Recess)	November 7	December (Recess)

The DC Board unanimously voted to approve the 2025 meeting calendar dates listed above on December 20, 2024, with options to change if needed.

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Agenda Item: Old Business

NASBA CPA Evaluation – Ms. Meggett-Strudwick gave an update to NASBA’s CPA Evaluations program and requested a decision from the board to approve the program for DC’s candidates to speed up the process with eligibility review or reject the process.

Upon motion duly made at 9:27 a.m. by board member Joseph Drew, and properly seconded by board member Antonia Browning Smiley, the board unanimously voted to approve the NASBA CPA Evaluation Institutional Degree Program.

Accountancy Board Outreach Efforts – Ms. Meggett-Strudwick will update the Board once outreach is organized. The board requested other college institutions to be added to the list of possibilities. Particularly, Catholic University.

EXECUTIVE SESSION

Upon motion duly made by board member Antonia Browning Smiley, and properly seconded by board member Joseph Drew, the board unanimously agreed by roll call to enter closed session at 9:50 a.m. pursuant to the authority of D.C. Official Code Section 2-575(b) (4) (A) to seek the advice of counsel, D.C. Official Code Section 2-575(b) (9) to discuss disciplinary matters, complaints, technical applications, and D.C. Official Code Section 2-775(b)(13) to deliberate upon a decision in an adjudication action or proceeding.

Agenda Item: Technical Review:

- *Complaint Review*
- *Reinstatement Review*

Agenda Item: Legal Matters:

- *None*

The following actions were taken due to the discussion during the closed session:

Upon a motion duly made at 11:51 a.m. by board member Joseph Drew, and properly seconded by board member Antonia Browning Smiley, the board unanimously voted to extend the credits as part of the CPA Evolution transition to extend those with credit on January 1, 2024, to December 31, 2025.

Upon a motion duly made at 11:51 a.m. by board member Antonia Browning Smiley, and properly seconded by board member Jason Danielson, the Board unanimously voted to accept the following legal recommendation: Board member Joseph Drew abstained.

In the matter of Timothy Trifilo, to impose a civil fine of \$5,000 and to revoke his license.

Upon a motion duly made at 11:52 a.m. by board member Joseph Drew, and properly seconded by board member Antonia Browning Smiley, the board unanimously voted to accept the following legal recommendation:

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In the matter of the complaints filed against Paul Thrasher and Kim Schwartz; dismiss and close the complaints. No action taken.

Upon a motion duly made at 11:53 a.m. by board member Joseph Drew, and properly seconded by board member Antonia Browning Smiley, the board unanimously voted to accept the following legal recommendation:

TECHNICAL REVIEW REINSTATEMENT APPLICATION		
NAME	APPROVED	INCOMPLETE / DEFERRED
Robert Belshe	X	-

Upon a motion duly made at 11:53 a.m. by board member Joseph Drew, and properly seconded by board member Antonia Browning Smiley, the board unanimously voted to accept the following legal recommendations:

TECHNICAL REVIEW APPLICATION		
NAME	APPROVED	INCOMPLETE / DEFERRED
Grant Thorton LLP	X	-
KPMG LLP	X	-
RSM US LLP	X	-
Price Waterhouse Coopers	X	-
CohnReznick LLP	X	-
Withumsmith+Brown, PC	X	-
Novogradac & Company LLP	X	-

Upon a motion duly made at 11:55 a.m. by board member Joseph Drew, and properly seconded by board member Antonia Browning Smiley, the board unanimously voted to accept the following legal recommendations:

TECHNICAL REVIEW – REINSTATEMENT APPLICATION		
NAME	APPROVED	INCOMPLETE / DEFERRED
Michael Corvelli	X	No further action

Upon a motion duly made at 11:55 a.m. by board member Jason Danielson, and properly seconded by board member Antonia Browning Smiley, the board voted to accept the following legal recommendation: Joseph Drew abstained

In the matter of Petergay Peterkin, to impose a civil fine of \$1,500, issue a formal reprimand, and offer a Consent Order.

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Upon a motion duly made at 11:56 a.m. by board member Jason Danielson, and properly seconded by board member Antonia Browning Smiley, the board voted to accept the following legal recommendation: Joseph Drew abstained

In the matter of Kimberly Erb, to impose a civil fine of \$500, issue a formal reprimand and offer a Consent Order.

Adjourn

Upon motion duly made at 11:57 a.m. by board member Joseph Drew, and properly seconded by board member Antonia Browning Smiley, the Board unanimously voted to adjourn.

The next scheduled meeting of the Board of Accountancy will be March 7, 2025, call in/virtual.

Respectfully submitted,

A handwritten signature in blue ink, which appears to read "Robert Todero", is written over a horizontal line.

Robert Todero, Chair

March 7, 2025

Date

Recorder: Angela Meggett-Strudwick, Board Administrator