



Occupational and Professional Licensing Administration Board of Accountancy

Meeting Minutes September 2, 2022

The District of Columbia Board of Accountancy (Board) held its regularly scheduled meeting on Friday, September 2, 2022. This was a call in/virtual meeting.

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The meeting was called to order at 9:04 a.m. by Board Chair, Robert Todero, and attendance was taken.

Board Members Present: Robert Todero, Dr. Joseph Drew, Bridgett Gagne, Angela Avant (9:10 am), and Antonia Browning Smiley

Board Members Absent:

Staff Present: Meggett-Strudwick, Board Administrator, Leon Lewis, Program Coordinator

Legal Counsel: J. Patrick White, Office of the General Counsel

Public Consumers Present: Kari Bedell, Greater Washington Society of CPAs and Paul Thrasher, Greater Washington Society of CPAs

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Agenda Item: Comments from the Public:

There were no comments from the public at this meeting.

Agenda Item: Acceptance of Draft Minutes

Upon motion duly made at 9:10 a.m. by board member Antonia Brown Smiley, and seconded by board member Dr. Joseph Drew, the Board unanimously voted to approve the August 5, 2022, draft Board meeting minutes.

Agenda Items: 2022/2023 NASBA Conferences/Meetings Calendar Meetings & Events



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Upcoming Events

[115th NASBA Annual Meeting](#)

October 30-November 2, 2022, San Diego, CA (tentative)

Travel Board members and staff will wait to

“Reserve the date”

October 30 – November 2, 2022

Proposed 2022 Board Meeting Dates – The scheduled board meeting dates and upcoming conferences as listed.

January 07	February 11	March 04	April 01 (Recess)
May 13	June 03	July 22 – Cancelled	August 05
September 02	October 07	November 04	December 02

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Agenda Item: Report - Applications for Licensure

Upon motion duly made by board member Angela Avant, and seconded by board member Dr. Joseph Drew, the Board unanimously voted to approve the September 5, 2022, list of accountancy applications for licensure, attached hereto and made a part of the September 5, 2022, minutes.

Agenda Item: Old Business

None

Agenda Item: Correspondence:

- *NASBA-SBR-June-Q2-22_Final*

Agenda Item: New Business

A. American University MSA Accountancy & Taxation student orientation BOA presentation, Saturday 8/27/2022

Angela Meggett-Strudwick, Board Administrator and Patricia Hartman, Director of Client Services (NASBA), presented to the American University MSA Accountancy & Taxation students the requirements for becoming a CPA and the resources available to



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them as they progress through their journey to licensure. Patricia Hartman spoke to the changes in the industry and the CPA Evolution and Angela Meggett-Strudwick spoke to the District of Columbia requirements and application process.

Dr. Joseph Drew briefly summarized the presentation and indicated it was a great opportunity to speak with international students about the benefits of licensure in the District of Columbia. There was excellent student participation and interaction during the presentation.

The students needed clarity on their internship experience being counted towards the required work experience. The Board discussed the different scenarios in which an internship might be suitable, but it was determined that the Board needed further clarification to decide if it can be used as work experience. Mr. Leon Lewis and Angela Strudwick will research further and revisit the discussion with the Board in the next meeting.

B. Hong Kong MRA

The Board briefly discussed NASBA's position on ending the agreement with Hong Kong at the end of year.

C. Board member Bridgett Gagne reported that she has been asked by NASBA to join a special task force for the Boards of Accountancy. She will have more information to report on their mission when she has met with them at the 115th Annual Meeting.

D. Leon Lewis informed the Board of the agency split that will be complete on October 1, 2022. Professional licensing will move to the 2nd and 3rd floors and will be totally remote after September 12, 2022, until the renovation of the new office space is complete. Everyone will be notified of their agency assignment. Leon Lewis and Angela Meggett-Strudwick have both received their confirmations of assignment to the DLCP agency. No information on who will head the agency as of this date.

Agenda Item: Technical Review and Reinstatement Application/s:

Previous application that was to be reviewed this meeting was deemed not a technical application and was processed and approved by the board staff August 29, 2022.

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Agenda Item: Legal Matters: None

There were no legal matters to review.



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EXECUTIVE SESSION

Upon motion duly made by board member Bridgett Gagne and seconded by board member Angela Avant, the Board unanimously voted to enter closed session at 10:18 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, and D.C. Official Code Section 2-775(b)(13) to deliberate upon a decision in an adjudication action or proceeding.

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

Upon motion duly made by board member Dr. Joseph Drew, and seconded by board member Angela Avant, the Board unanimously voted to follow the legal recommendations presented by J. Patrick White, Office of the General Counsel to re-affirm the decision previously approved for the complaints presented in the closed session.

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Adjourn

Upon motion duly made by board member, Bridgett Gagne, and properly seconded by board member, Angela Avant, the Board voted unanimously to adjourn at 10:22 am.

The next scheduled meeting of the Board of Accountancy will be October 7, 2022.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Robert Todero", is written over a horizontal line.

Robert Todero, Chair

10/14/2022

Date

Recorder: Angela Meggett-Strudwick, Board Administrator