

**Connecticut State Board of Accountancy**  
**Meeting Agenda**  
**Tuesday, October 6, 2015 – 10:00 A.M.**  
Second Floor Conference Room  
30 Trinity St., Hartford, CT 06106  
860-509-6179  
[sboa@ct.gov](mailto:sboa@ct.gov)

**OFFICE AND BOARD OPERATIONS AND ADMINISTRATION**

1. **Action required** – Approve Minutes of the September 1, 2015 Board Meeting.

**INFORMATION REPORTS**

2. **Administrative Updates**
  - a. Marcia L. Marien appointed to the Auditing Standards Board
  - b. Educational Requirements for the CPA Exam and Licensure – Updates
  - c. US Department of Labor
  - d. CPE Audit Update
  - e. Personal Data Regulation - Approval
3. **Vote on Meeting Dates for 2016**

**PUBLIC COMMENT**

4. Opportunity for members of the public to address the Board

**EXAM AND LICENSING**

**OLD BUSINESS**

5. **Action required – Industry, Government, or Self Employed experience, and Other Applications**

**NEW INFORMATION PROVIDED**

**William J. Farrell** - Requesting extension of time to complete 40 hours of CPE for the 2014-2015 reporting year. Tabled August 4, 2015 meeting. Wish to withdraw extension request and would like a waiver for CPE.

**Stephen Elia, Jr.** – Requesting extension for CPE. Tabled August 4, 2015 meeting.

**Anthony F. DeLucia** – Requesting an extension of time to complete the 40 hour CPE requirement for 2014-2015 reporting year. Tabled August 4, 2015 meeting.

**Lyn R. Meyers** - Requesting an extension of time to complete the 40 hour CPE requirement for 2014-2015 reporting year until the end of August 2015. Tabled August 4, 2015 meeting. Submitting additional information

**NO NEW INFORMATION PROVIDED**

**Michael S. Jelormine** – Requesting an extension of time to complete the 40 hour CPE requirement for 2014-2015 reporting year until 2/2016. Tabled August 4, 2015 meeting.

**Leslie Carroll** - Requesting an extension of 3 to 4 months to complete the 40 hour CPE requirement for the 2014-2015 reporting year. Tabled August 4, 2015 meeting.

## **NEW BUSINESS**

- 6. Action Required - Industry, Government, or Self Employed experience, and Other Applications**  
**Justin Sorel** - Initial CPA Certificate & Certificate Registration, Industry Experience  
**William Cologne** - Initial CPA Certificate & Certificate Registration, Industry Experience  
**Santiago Londono** - Initial CPA Certificate & Certificate Registration, Industry Experience
- 7. REVIEW FIRM PERMITS FOR APPROVAL – List Provided**
- 8. PCAOB Inspection Reports Received – member comment on review**  
**August 21, 2015 - Kenne Ruan, CPA, P.C.**  
**Kreischer, Miller & Co.**  
**McGladrey LLP**  
**Pue, Chick, Leibowitz & Blezard, LLC**

**EXAMINATION AND CPE EXTENSION- None**

## **OTHER BUSINESS**

- 9. Enforcement Cases – Enforcement Overview**
  - a. **2011092-3786** - Stephanie Syzmonik vs. Thomas J. Filomeno
  - b. **2013-45** - Michael G. Kessler vs. Linda Webb
  - c. **2010148-3498** - Scott Daigle vs. James S. Viola
  - d. **2014-17** - Donna Schwartz vs. Andrew B. Rosenberg
  - e. **2015-44** - Connecticut State Board of Accountancy vs. Parker Tax Services, LLC.
  - f. **2015-43** - Patricia Hatton vs. Peter K. LaForte
  - g. **2009137-3311** - Judith Mulloy vs. Michael Smeriglio, III, CPA, CFP, PFS
  - h. **2015-15** - Joyce Bondos vs. William C O'Doy
  - i. **2014-26** - Thomas C. Roballey vs. Glen J. Belush
  - j. **2014-14** - Frederick & Veronica Scarfi vs. Sean Patrick McNamee
  - k. **2014-60** - Linda Ricciardi vs. Meir Fischer
  - l. **2015-40** - Connecticut State Board of Accountancy vs. Samet & Company, PC
  - m. **2015-39** - Connecticut State Board of Accountancy vs. Robert M. Davenport, CPA
  - n. **2014-44** - Connecticut State Board of Accountancy vs. Attilio S. Merlino
  - o. **2009168-3346** - Connecticut State Board of Accountancy vs. Sean Patrick McNamee

## **PUBLIC COMMENT**

Opportunity for members of the public to address the board.

Executive Session – Personnel Matter

SBA-12 Subcommittee meeting following Board meeting.

Next scheduled meeting: Thursday, November 10, 2015 -10:00 AM- 2nd Floor, 30 Trinity Street, Hartford, CT