

**Agenda for the January 22, 2026  
Meeting of the State Board of Accountancy**

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**Bureau of Professional and Occupational Affairs  
Pennsylvania State Board of Accountancy**

**Agenda for January 22, 2026**

**Time**

Executive Session: 9:00 AM  
Public Session: 10:30 AM

**Location**

In person  
Eaton Board Room  
2525 N. 7<sup>th</sup> Street  
Harrisburg, PA 17110

Online via Microsoft Teams  
[Click here to join the Board of Accountancy meeting](#)

Call In (audio only)  
1-267-332-8737  
Access code: 275 777 49#

**Board Members**

Michael D. Ocker, CPA, Chair  
Arion Claggett, Acting Commissioner of Professional and Occupational Affairs  
W. Bradley Baturka, CPA  
Monique M. Ericson, CPA, Office of Attorney General  
Michael Gaizick, CPA  
John J. Grater, CPA  
Benjamin Holland, CPA, Vice-Chair  
Chandra "Dolly" M. Lalvani, CPA  
Charles O'Brien, CPA  
John Petchel, Public Member

**Board Counsel**

Dean F. Picarella, Esquire

**Board Prosecution Liaison**

Ashley P. Murphy, Esquire

**Board Administrator**

Miranda Murphy

**Vacancies**

Public Member, vacant  
Public Member, vacant  
CPA Member, vacant  
CPA Member, vacant  
PA Member, vacant

*This Board meeting will be recorded for purposes of completing the required minutes. Your voluntary participation in the meeting constitutes consent to be recorded.*

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**MEETING CALL TO ORDER**, Michael D. Ocker, CPA, Chair

**ROLL CALL**

**APPROVAL OF MINUTES**

1. November 19, 2025 Board of Accountancy Draft Meeting Minutes \*

**CASE STATUS REPORT**

**REPORT OF PROSECUTORIAL DIVISION**

**Timothy A. Fritsch, Esq.**

2. Case No. 25-55-006805 \*

**REPORT OF BOARD COUNSEL**, Dean F. Picarella, Esq.

**Matters for Possible Delegation to Hearing Examiner**

3. Petition for Reinstatement of the Certified Public Accountant License of Lorraine Ann Palka, Case No. 25-55-018978 \*

**Regulations**

4. Regulatory Report
5. Regulation 16A-5517 Licensure by Endorsement
6. Regulation 16A-5519 General Revisions

**Miscellaneous**

7. Sunshine Act and Recusal Training

**REPORT OF BOARD CHAIRMAN**, Michael D. Ocker, CPA

8. Sunshine Act
9. Gift Ban Policy

**REPORT OF ACTING COMMISSIONER**, Arion Claggett

**REPORT OF BOARD ADMINISTRATOR**, Miranda Murphy

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**REPORT OF COMMITTEES**

**REVIEW OF PROGRAM SPONSOR APPLICATIONS**

**REVIEW OF CPA EXAMINATION FILES**

**REVIEW OF REQUESTS**

**Requests for Waiver or Extension of CPE Requirements – Approved, for Ratification**

10. Means \*
11. Kieti \*
12. Cardenas \*
13. Palumbo \*
14. Bell \*
15. Markowitz \*
16. Jackson \*
17. Moyer \*
18. Li \*
19. Degnan \*
20. Schuler \*
21. Avrach \*
22. Pflum \*
23. Wagner \*
24. Starke \*
25. Chachra \*
26. Hartman \*
27. Steele \*
28. Yu \*
29. Kirkpatrick \*
30. Reale \*
31. Desy \*
32. Verbanac \*
33. Fitzpatrick \*
34. Ortiz \*
35. Fergus \*
36. Hill \*
37. Cerino \*
38. Bailey \*
39. Ihnatsiuk \*
40. Ferguson \*
41. Beattie \*
42. Gamble \*
43. Napolitan \*
44. Black \*
45. Stepnick \*
46. Montler \*
47. Wasmuth \*
48. Mascetta \*
49. McLaughlin \*

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**Requests for Waiver or Extension of CPE Requirements – Denied, for Ratification**

- 50. Azzari \*
- 51. Simmens \*
- 52. Newman \*
- 53. Rana \*
- 54. Worthington \*
- 55. Beccone \*
- 56. Iannarelli \*

**Requests for Waiver or Extension of CPE Requirements – For Discussion**

- 57. Okpara \*

**Requests for Extension of Examination Credits – For Discussion**

- 58. Alzayed \*
- 59. Macrino \*

**Requests for Extension of Examination Credits – Approved, for Ratification**

- 60. Oswald \*
- 61. Smith \*
- 62. Klauder \*
- 63. Short \*

**Requests for Extension of Examination Credits – Denied, for Ratification**

- 64. Lahoti \*

**Requests for Exemption from Peer Review Requirements – Approved, for Ratification**

- 65. BRI Accounting Services PC \*

**CORRESPONDENCE**

**MISCELLANEOUS**

- 66. Election of Board Chairperson and Vice-Chairperson
- 67. NASBA Annual Conference for State Board Executive Directors and Legal Counsel –  
March 24-26, 2026 – Austin, TX
- 68. NASBA Eastern Regional Meeting – June 9-11, 2026 – Rio Grande, PR
- 69. Response to NASBA PE Task Force White Paper
- 70. NASBA State Board Report – Fall 2025
- 71. NASBA Quarterly Communications – Q4 2025
- 72. NASBA Enforcement Report – Q4 2025
- 73. Responses to Federal Reclassification of Accounting Degrees as “Non-Professional”

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**Appointments**

74. 11:15 am: Deputy Chief Counsel, Shana Walter, Esq. – Annual Prosecution Report
75. 11:30 am: Jennifer Cryder, CPA, CEO of PICPA – regarding updates in the profession

**Board Committees**

76. Board Committees

**Next Meeting Dates**

77. 2026 Board Meeting Dates
78. 2027 Board Meeting Dates

**ADJOURNMENT**

\* Indicates Item was Discussed in Executive Session

**Next Meeting Date: April 23, 2026**

**2026 Board Meeting Dates:**

April 23<sup>rd</sup>  
May 21<sup>st</sup>  
July 23<sup>rd</sup>  
September 17<sup>th</sup>  
November 19<sup>th</sup>

**2027 Board Meeting Dates:**

January 19<sup>th</sup>  
April 22<sup>nd</sup>  
May 25<sup>th</sup>  
July 20<sup>th</sup>  
September 21<sup>st</sup>  
November 16<sup>th</sup>

Board Telephone Number:  
Department of State Website:  
Board Website:

1-833-DOS-BPOA  
[www.dos.pa.gov](http://www.dos.pa.gov)  
[www.dos.pa.gov/account](http://www.dos.pa.gov/account)