

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

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

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REPORT OF ACTING COMMISSIONER, Arion Claggett

REPORT OF BOARD ADMINISTRATOR, Miranda Murphy

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 *

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

- 39. Azzari *
- 40. Simmens *
- 41. Newman *
- 42. Rana *
- 43. Worthington *
- 44. Beccone *

Requests for Waiver or Extension of CPE Requirements – For Discussion

- 45. Okpara *

Requests for Extension of Examination Credits – Approved, for Ratification

- 46. Oswald *
- 47. Smith *

Requests for Extension of Examination Credits – Denied, for Ratification

- 48. Lohoti *

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

- 49. BRI Accounting Services PC *

CORRESPONDENCE

MISCELLANEOUS

- 50. NASBA Annual Conference for State Board Executive Directors and Legal Counsel – March 24-26, 2026 – Austin, TX
- 51. NASBA Eastern Regional Meeting – June 9-11, 2026 – Rio Grande, PR
- 52. Response to NASBA PE Task Force White Paper
- 53. NASBA State Board Report – Fall 2025
- 54. NASBA Quarterly Communications – Q4 2025
- 55. NASBA Enforcement Report – Q4 2025
- 56. Responses to Federal Reclassification of Accounting Degrees as “Non-Professional”

Appointments

- 57. 11:15 am: Deputy Chief Counsel, Shana Walter, Esq. – Annual Prosecution Report
- 58. 11:30 am: Jennifer Cryder, CPA, CEO of PICPA – regarding updates in the profession

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Board Committees

59. Board Committees

Next Meeting Dates

60. 2026 Board Meeting Dates

61. 2027 Board Meeting Dates

ADJOURNMENT

* Indicates Item was Discussed in Executive Session

Next Meeting Date: April 23, 2026

2026 Board Meeting Dates:

April 23rd

May 21st

July 23rd

September 17th

November 19th

2027 Board Meeting Dates:

January 19th

April 22nd

May 25th

July 20th

September 21st

November 16th

Board Telephone Number: 1-833-DOS-BPOA

Department of State Website: www.dos.pa.gov

Board Website: www.dos.pa.gov/account