

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



**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. 7th 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.

**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

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

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 *

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

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

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

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