

**Agenda for the July 23, 2025
Meeting of the State Board of Accountancy**



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

Agenda for July 23, 2025

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: 620 875 262#

Board Members

Michael D. Ocker, CPA, Chair
Arion Claggett, Acting Commissioner of
Professional and Occupational Affairs
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
John Petchel, Public Member

Board Counsel

Ronald K. Rouse, 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
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

APPROVAL OF MINUTES

1. May 21, 2025 Board of Accountancy Draft Meeting Minutes *

CASE STATUS REPORT

REPORT OF PROSECUTORIAL DIVISION

Ashley P. Murphy, Esq.

2. Case No. 22-55-009185 *

Timothy A. Fritsch, Esq.

3. Case No. 24-55-006647 and Case No. 24-55-009379 *
4. Case No. 24-55-005845 *

REPORT OF BOARD COUNSEL, Ronald K. Rouse, Esq.

Final Adjudication and Order

5. BPOA v. Philip Keith Miller, Case No. 23-55-006594 *
6. BPOA v. Joseph William Nocito, Case No. 23-55-000814 *
7. BPOA v. Timothy Montgomery Zimmerman, Case No. 23-55-017238 *

Regulations

8. Regulatory Report
9. Regulation 16A-5517 Licensure by Endorsement
10. Regulation 16A-5519 General Revisions

Miscellaneous

11. Act 27 of 2025 (Amendments to the CPA Law)

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REPORT OF BOARD CHAIRMAN, Michael D. Ocker, CPA

- 12. Sunshine Act
- 13. Gift Ban Policy

REPORT OF ACTING COMMISSIONER, Arion Claggett

REPORT OF BOARD ADMINISTRATOR, Miranda Murphy

REPORT OF COMMITTEES

- 14. Off-site Meeting Committee – Possible Locations

REVIEW OF PROGRAM SPONSOR APPLICATIONS

- 15. WellSpan Health *
- 16. Communication Platforms Inc. *
- 17. First Community Foundation Partnership of Pennsylvania *

REVIEW OF CPA EXAMINATION FILES

REVIEW OF REQUESTS

Requests for Waiver or Extension of CPE Requirements – for Discussion

- 18. Richason *
- 19. Adams *
- 20. Ahmad *
- 21. Okpara *

Requests for Extension of Examination Credits – for Discussion

- 22. Macrino *

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Requests for Extension of Examination Credits – Approved, for Ratification

- 23. Stenta *
- 24. Eschenbach *
- 25. Evans *
- 26. Fung *
- 27. Merachnik *
- 28. Duzy *
- 29. Moorhatch *
- 30. Rieder *
- 31. Blake *
- 32. Short *
- 33. King *
- 34. Butler *
- 35. Deolekar *
- 36. Toroni *
- 37. Galuchie *
- 38. Acheampong *
- 39. Masannat *
- 40. Gombeke Bidias *
- 41. Sharma *

Requests for Extension of Examination Credits – Denied, for Ratification

- 42. Nair *
- 43. Tyler *
- 44. Samuelsen *
- 45. Farren *
- 46. Smith *
- 47. Wilcox *
- 48. Sutter *
- 49. Cass *
- 50. Ha *

CORRESPONDENCE

MISCELLANEOUS

- 51. NASBA Eastern Regional Meeting Recap
- 52. NASBA Annual Meeting – Chicago, IL – October 26-29, 2025
- 53. NASBA Spring 2025 State Board Report
- 54. NASBA Quarterly Communications
- 55. NASBA Enforcement Alert
- 56. NASBA – Experience, Learn and Earn Program Discontinuation

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Appointments

57. 11:15 am: Jennifer Cryder, CPA, CEO of PICPA – regarding updates in the profession

Board Committees

58. Board Committees

Next Meeting Dates

59. 2025 Board Meeting Dates

60. 2026 Board Meeting Dates

ADJOURNMENT

* Indicates Item was Discussed in Executive Session

Next Meeting Date: September 17, 2025

2025 Board Meeting Dates:

September 17th

November 19th

2026 Board Meeting Dates:

January 22nd

April 23rd

May 21st

July 23rd

September 17th

November 19th

Board Telephone Number:

1-833-DOS-BPOA

Department of State Website:

www.dos.pa.gov

Board Website:

www.dos.pa.gov/account