

**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. 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: 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.***

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

---

**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)

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

---

**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 – Approved, for Ratification**

- 18. Adams \*
- 19. Ahmad \*

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

- 20. Richason \*
- 21. Okpara \*
- 22. Messa \*

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

- 23. Macrino \*
- 24. Banaag \*

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

---

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

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

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

- 46. Nair \*
- 47. Tyler \*
- 48. Samuelsen \*
- 49. Farren \*
- 50. Smith \*
- 51. Wilcox \*
- 52. Sutter \*
- 53. Cass \*
- 54. Ha \*
- 55. Babu \*

**CORRESPONDENCE**

**MISCELLANEOUS**

- 56. NASBA Eastern Regional Meeting Recap
- 57. NASBA Annual Meeting – Chicago, IL – October 26-29, 2025
- 58. NASBA Spring 2025 State Board Report
- 59. NASBA Quarterly Communications
- 60. NASBA Enforcement Alert
- 61. NASBA Enforcement Report – Q2 2025
- 62. NASBA – Experience, Learn and Earn Program Discontinuation

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

---

**Appointments**

63. 11:15 am: Jennifer Cryder, CPA, CEO of PICPA – regarding updates in the profession

**Board Committees**

64. Board Committees

**Next Meeting Dates**

65. 2025 Board Meeting Dates

66. 2026 Board Meeting Dates

**ADJOURNMENT**

\* Indicates Item was Discussed in Executive Session

**Next Meeting Date: September 17, 2025**

**2025 Board Meeting Dates:**

September 17<sup>th</sup>

November 19<sup>th</sup>

**2026 Board Meeting Dates:**

January 22<sup>nd</sup>

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>

Board Telephone Number:

1-833-DOS-BPOA

Department of State Website:

[www.dos.pa.gov](http://www.dos.pa.gov)

Board Website:

[www.dos.pa.gov/account](http://www.dos.pa.gov/account)