

OKLAHOMA ACCOUNTANCY BOARD

MINUTES OF REGULAR MEETING

May 14, 2021

The Oklahoma Accountancy Board (OAB) convened in regular session on Friday, May 14, 2021 at Oklahoma Accountancy Board, 201 NW 63rd St; Ste. 210, Oklahoma City, OK 73116 and Videoconference. A recording of the meeting is on file in the OAB office. Members present at Call to Order:

James Taylor, CPA, Chair
 Robin Byford, CPA, Vice Chair
 David Greenwell, CPA, Secretary
 Randa Vernon, CPA
 Jody Manning, Member
 Taylor Green, Member

The following members of the Oklahoma Accountancy Board are participating from their designated location:

Sandra Siegfried, CPA 35 Cedar Ridge Rd Broken Arrow, OK 74011

Board staff present at the meeting: Executive Director, Randy Ross; Colin Autin, Deputy Director; and Amy Freeman, Administrative Assistant. Assistant Attorney General John Crittenden was also present.

Agenda Item #1a – Call To Order: At approximately 9:30 AM, Chair Taylor called the meeting to order. A roll call vote was taken and recorded as follows:

Vernon HERE
 Greenwell HERE
 Byford HERE
 Taylor HERE
 Manning HERE
 Green HERE
 Siegfried HERE

Agenda Item #1b – Declaration of Quorum: Chair Taylor declared a quorum.

Agenda Item #1c – Announcement of Legal Meeting Notice: Executive Director Ross confirmed the notice of the meeting was filed with the Secretary of State and the agenda for the meeting was properly posted in compliance with the Open Meeting Act.

Agenda Item #1d – Announcement of Absences and Action, if Necessary, to Determine Whether Absence(s) Were Unavoidable Pursuant to Title 59, Section 15.3(B)(5): There were no absences.

2637.

Agenda Item #2 – Announcement of Visitors: The following visitors were participating remotely through Videoconference: Steve Milam, representing the OSCPA; Dean Taylor, representing the OSA; and Chris Jenkins, guest.

Agenda Item #3 – Public Comment Period: Executive Director Ross advised the Board that he had not received any requests for public comment.

Agenda Item #– Consent Agenda: The Consent Agenda contained five items for the OAB’s consideration: (1) Approve the Minutes of the April 16, 2021, Regular Meeting of the OAB; (2) Take official notice of the preliminary OAB financial statements for month ending April 30, 2021; (3) Take official notice of the experience verification applications which have been approved by the Executive Director; (4) Approve the actions taken by the Executive Director on applications and registrations filed since the previous meeting; and (5) Approve the verification of the administration posting to the OAB’s records and certification of scores for Quarter 1/2021 Examination [January through March 2021].

Motion by Manning that the Board approve the Consent Agenda. Second by Byford.

A roll call vote was taken and recorded as follows:

Vernon AYE
Greenwell AYE
Byford AYE
Taylor AYE
Manning AYE
Green AYE
Siegfried AYE

Agenda Item #5 – Discussion and possible action on Administrative Actions and recommendations and report from the Enforcement Committee:

There were no Administrative Actions.

- Recommendation to approve the proposed professional investigator contract for fiscal year 2022.

Motion by Vernon that the Board approve the proposed professional investigator contract for fiscal year 2022. Second by Byford.

A roll call vote was taken and recorded as follows:

Vernon AYE
Greenwell AYE
Byford AYE
Taylor AYE
Manning AYE
Green AYE
Siegfried AYE

Agenda Item #6 – Discussion and possible action on report from Audit and Budget Committee:

- Recommendation to approve the proposed professional services contracts for fiscal year 2022

Motion by Greenwell that the Board approve the proposed professional services contracts for fiscal year 2022. Second by Byford.

A roll call vote was taken and recorded as follows:

Vernon AYE
 Greenwell AYE
 Byford AYE
 Taylor AYE
 Manning AYE
 Green AYE
 Siegfried AYE

Agenda Item #7 – Discussion and possible action on nominations for NASBA awards and officers:

Motion by Greenwell to nominate Vicky Petete for the William H. Van Rensselaer Public Service Award, Executive Director Ross for the Lorraine P. Sachs Standard of Excellence Award, and Barbara Ley for the Distinguished Service Award. Second by Byford.

A roll call vote was taken and recorded as follows:

Vernon AYE
 Greenwell AYE
 Byford AYE
 Taylor AYE
 Manning AYE
 Green AYE
 Siegfried AYE

Agenda Item #8 – Discussion and act on election of officers pursuant to Section 15.4.A of the Oklahoma Accountancy Act: Chair Taylor addressed this item and entertained motions related to the election of the Board officers for the next fiscal year.

Chair Taylor entertained motions related to the election of the Chair, Vice Chair and Secretary for the next fiscal year.

2639.

Motion by Vernon that Robin Byford be elected Chair of the OAB, David Greenwell be elected Vice Chair of the OAB, and Sandra Siegfried be elected Secretary of the OAB. Second by Greenwell.

A roll call vote was taken and recorded as follows:

Vernon AYE
Greenwell AYE
Byford AYE
Taylor AYE
Manning AYE
Green AYE
Siegfried AYE

Agenda Item #9 – Presentation and possible action on report from the Legislative-Rules Promulgation Committee: Secretary Greenwell presented potential legislative/rules changes for consideration. A brief discussion took place among the Board.

Agenda Item #10 – New Business: There was no new business.

Agenda Item #11 – Discussion and possible action on report from the Executive Director:

Updates

- Jim Taylor and Robin Byford (alternate) are the voting members for any votes cast during the NASBA Annual Western Regional meeting.
- Legislation continues and we are monitoring.
- Welcome new Board members – Jody Manning, Taylor Green, and Bryan Storms
- We are working on Firm registration – seems to be going well
- Staff continues to be very busy
- I will be getting with David and the rules/legislation committee very soon

Expenditures made by the Executive Director between \$2,500 and \$5,000 since the preceding Board meeting:

- BEP One –May 2021 rent/storage fee - \$4,543.67

Expenditures made by the Executive Director with approval of the Chair between \$5,000 and \$10,000 since the preceding Board meeting:

- OMES – Mar 2021 IT services/lease payments - \$6,156.61

Motion by Manning to approve the report from the Executive Director. Second by Greenwell.

A roll call vote was taken and recorded as follows:

Vernon AYE
Greenwell AYE
Byford AYE
Taylor AYE
Manning AYE
Green AYE
Siegfried AYE

Agenda Item #12 – Discussion and possible action on report from the Chair:

- Announcements
- Announce date and location of the next meeting – 9:30 a.m., Friday, June 18, 2021, at the Oklahoma Accountancy Board, 201 NW 63rd Street, Ste. 210, Oklahoma City, OK 73116.

Agenda Item #13 – Adjourn: There being no further business to come before the Board, Chair Taylor adjourned the meeting at approximately 10:26 AM.

James Taylor, Chair Date

ATTEST:

David Greenwell, Secretary Date

APPENDIX I

**Actions Approved by the Executive Director
As of May 14, 2021**

APPLICATIONS FOR CERTIFICATION (Successful Candidates):

Sabrina Joy Allgood
Zachary Paul Butler
Nathan Richard Carson
Josue Castro
Amber Nicole Day
Pete J Edwards
Kyle Wayne Gilmore
Keegan Thomas Grooms
Hunter Christian Hansen
Christopher Jon Jenkins
Bailey Jordan
Kaitlin Michele Karcher
Andrew Austin King
Michael Lair
Anne Elizabeth Lindsay
Yusuf Abdelhakam Abdelkader Marey
Janet Bernice McGraw
Allison Suzanne Robinson
Adrian Shoecraft
Elbereth A Smith
Kooper Alise Taylor
Joseph Urbon

APPLICATIONS FOR RECIPROCAL CPA CERTIFICATES:

Alyssa Griggs Martin (Texas)
Davoua Vang (Tennessee)

APPLICATIONS FOR REINSTATEMENT OF CPA CERTIFICATES:

Vicky Fowler	14837
Bryan Lamey	12535

INITIAL FIRM REGISTRATIONS OF PROFESSIONAL LIMITED LIABILITY PARTNERSHIPS:

Novogradac & Company LLP (California)

INITIAL FIRM REGISTRATIONS OF PROFESSIONAL LIMITED LIABILITY COMPANIES:

Hite CPA PLLC
 J. Derek Garber, CPA PLLC
 Neumeister PLLC

CERTIFICATES SURRENDERED BY REGISTRANTS:

CPAs:

No Longer Practicing in Oklahoma:

Jason Adkins	14467	Issued August 2, 1999
Francis Crites	3069	Issued January 28, 1974
Joshua Ketter	16321	Issued January 25, 2008
Carter Lance	18241	Issued November 18, 2016
Sandra Reynolds	9263	Issued January 29, 1987
David Wood	11021	Issued July 26, 1990

No Longer Residing in Oklahoma:

Doris Fowler	11782	Issued July 28, 1992
Xinyi Zhang	18509	Issued February 16, 2018

Retired:

Virginia Aguilar	9634	Issued January 28, 1988
Daniel Benco	16243	Issued September 7, 2006
Richard Locke	4788	Issued June 18, 1979
Kent Pickrell	7693	Issued July 26, 1984

INDIVIDUALS AUTOMATICALLY REVOKED AS A RESULT OF NON-COMPLIANCE WITH 68 O.S. § 238.1 AND 59 O.S. § 15.14:

Cert No.	Name	Revocation Date
862	Robert Whitnell	4/1/2020
4521	Charles Thompson	4/1/2020
6464	Thomas Wilkins	4/1/2020
8408	Martin Depenthal	4/1/2020
11973	Lowell Castle	4/1/2020
1333	Leon Moore	5/1/2020
3228	James Hill	5/1/2020
3445	Jerald Baldwin	5/1/2020
8082	Tamera Eastman	5/1/2020
8134	James White	5/1/2020
14123	Katherine Townley	5/1/2020
14363	Gary Hairston	5/1/2020
17565	Ranessa Critton	5/1/2020

2643.

18092	Bryan Webster	5/1/2020
872	James Nipper	6/1/2020
7590	Janet Gresham	6/1/2020
8645	Susan Reddekopp	6/1/2020
10664	Mark Galaway	6/1/2020
11402	Diane Nelson	6/1/2020
12444	Miranda Xing-Scroggins	6/1/2020
16185	Melanie Miller	6/1/2020
17809	Sarah Hooper	6/1/2020
18059	Zachary Frankfurt	6/1/2020
5948	William Gertsen	7/1/2020
7715	Joan Root	7/1/2020
9775	Susan Mueller	7/1/2020
13171	Rhonda Osborn	7/1/2020
13897	Robin Lee	7/1/2020
15010	Jason Robertson	7/1/2020
17699	Shelli Little	7/1/2020
18616	Gabrielle Meehan	7/1/2020
712	Cecelia Bowers	8/1/2020
3841	Larry Wimmer	8/1/2020
5225	Kathryn Offermann	8/1/2020
5815	William Winkler	8/1/2020
10427	Paul Hardy	8/1/2020
12633	Beth Noble	8/1/2020
16275	Huong Weber	8/1/2020
18302	Benjamin Smith	8/1/2020
18337	Wesley Middlebrook	8/1/2020
7063	Margaret Keaton	9/1/2020
7876	James Bruce	9/1/2020
16195	Kim Walton	9/1/2020
17071	Grant Hall	9/1/2020
17199	Afolabi Arikenbi	9/1/2020
18635	Micah Geisenberg	9/1/2020
18729	Nicholas Bakula	9/1/2020
18947	Damon Sullivan	9/1/2020
3059	James Brown	10/1/2020
4246	Thomas Bueno	10/1/2020
5108	Paul Moore	10/1/2020
9130	Jeffry Cotner	10/1/2020
9731	Kathleen Klein	10/1/2020
11994	Gary Ellis	10/1/2020

13843	Christopher Brown	10/1/2020
15610	D. Reynard	10/1/2020
17164	Ahimsa Wilderom	10/1/2020
17368	Cameron Sampler	10/1/2020
18149	Lynsea Freeman	10/1/2020
1083	Sherman Cole	11/1/2020
2709	Kenneth Burdick	11/1/2020
2888	Fred Turner	11/1/2020
5239	Robert Brun	11/1/2020
5277	Robert Henry	11/1/2020
7658	Michael McVey	11/1/2020
8625	Reba Brew	11/1/2020
8704	Kelli Mulloy	11/1/2020
10787	Roger Southerland	11/1/2020
13065	Donnie Acree	11/1/2020
14457	Scott Fields	11/1/2020
16889	Jann Knotts	11/1/2020
18011	Haley DeMarco	11/1/2020
18857	Zachary Ball	11/1/2020
1064	Suzanne Hathaway	12/1/2020
4302	James Lawler	12/1/2020
5805	Cheryl Thomas	12/1/2020
6173	Kent Mauk	12/1/2020
6912	Michael Heald	12/1/2020
8738	Dwight Seaman	12/1/2020
11296	Bruce Coble	12/1/2020
13912	Kyla Gonzales	12/1/2020
14805	Melissa Banker	12/1/2020
16633	Gauri Aggarwal	12/1/2020
16663	Chase Schnebel	12/1/2020
17722	Gregg Cheshier	12/1/2020
18874	Yang Li	12/1/2020
6051	Michael Sheaffer	1/1/2021
6080	Duard Thomas	1/1/2021
6625	Mia Johnson	1/1/2021
7636	Duane Koschmeder	1/1/2021
9643	Joe Beller	1/1/2021
11292	Lisa Carlile	1/1/2021
11470	Paul Thomas	1/1/2021
12459	Kay Kittleman	1/1/2021
12803	Alan Vail	1/1/2021
14191	Kelly Foster	1/1/2021

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15733	Kenton Miller	1/1/2021
17393	Allyson Jones	1/1/2021
266	Theodore Bingham	2/1/2021
2001	Richard Sullivan	2/1/2021
2168	John Sterling	2/1/2021
2650	Steven Rice	2/1/2021
3422	Jerry Meyers	2/1/2021
3462	Duane Davis	2/1/2021
4653	William Larue	2/1/2021
5196	Jack Phillips	2/1/2021
5826	Jodie Carroll	2/1/2021
5978	Sandra Howerton	2/1/2021
5399	Herbert Haschke	2/1/2021
6691	Phillip Roe	2/1/2021
7071	Brooke White	2/1/2021
7521	Gerald Banker	2/1/2021
7647	Ricky Luke	2/1/2021
7656	Jeffrey McNaughton	2/1/2021
8512	Calvin Ellis	2/1/2021
8859	Paull Gill	2/1/2021
9185	James Hartline	2/1/2021
10106	James Riggs	2/1/2021
11012	Lisa Hall	2/1/2021
11495	Charles Berreth	2/1/2021
11599	Warren Miller	2/1/2021
11712	James Lavender	2/1/2021
12518	Paul Jackson	2/1/2021
12760	Brad McSweeney	2/1/2021
13127	Marilyn Ohler	2/1/2021
14350	Stephanie Edwards	2/1/2021
14407	Anthony Scheiper	2/1/2021
15091	Christy Degiusti	2/1/2021
15245	Ramona Al-Zubaudu	2/1/2021
15258	Brian Buffington	2/1/2021
16026	David Evans	2/1/2021
16126	Elena Martyanova	2/1/2021
2083	Stanley Harrison	3/1/2021
4158	Lonnie Whatley	3/1/2021
4480	Teresa Morey	3/1/2021
4493	J. Pendergraft	3/1/2021
4896	Philip Odom	3/1/2021
6274	Pamela Varndell	3/1/2021
7377	Cynthia Roach	3/1/2021
7676	Forrest Moseley	3/1/2021

11409	Tonya Swindell	3/1/2021
11616	Lee Pilgrim	3/1/2021
12359	Margaret Conner	3/1/2021
13665	Garry Drake	3/1/2021
14837	Vicky Fowler	3/1/2021
4143	Etta Smith	4/1/2021
5410	Linzey Lindhout	4/1/2021
5716	Jack Heitman	4/1/2021
6879	Michael Diller	4/1/2021
7698	Jerri Sculley	4/1/2021
9235	Dana Michaelis	4/1/2021
11764	Patrick Dale	4/1/2021
11983	Paul Croley	4/1/2021
12684	Laura Nixon	4/1/2021
13801	Chad York	4/1/2021
17118	Sara Momper	4/1/2021
17916	Megan Casad	4/1/2021
18719	Xiang Li	4/1/2021
4149	Mehroo Damri	5/1/2021
5426	Vince Terril	5/1/2021
10504	John Rohrbacker	5/1/2021
10756	Wallace Pope	5/1/2021
18400	Justin Boyd	5/1/2021
18432	Allison Guimond	5/1/2021

CERTIFICATES PLACED IN RETIRED STATUS BY REGISTRANTS:

CPAs:

Cert No.	Name	Issue Date
1795	John Sturges	2/6/1965
1800	James Deen	2/6/1965
2004	James Willis	8/5/1967
2052	Carroll York	1/27/1968
2342	Thomas Brown	7/27/1970
2386	Dennis Purdum	7/27/1970
2758	Dennis Sharkey	7/31/1972
2780	James Wittrock	7/31/1972
2852	L. Hunt	1/26/1973
2853	Timothy Kloehr	1/26/1973
2896	Michael Ward	1/26/1973
3061	John Chain	1/28/1974
3126	Jo Drisko	1/28/1974
3131	Dixie Sturges	1/28/1974

2647.

3582	Steven Hendley	12/3/1975
3744	Jackie Anderson	7/19/1976
3764	Patricia Creekmore	7/19/1976
3778	Thomas Gill	7/19/1976
4162	R. Williams	7/18/1977
4266	Jane Sale	1/23/1978
4987	Deborah Allen	11/30/1979
5212	Gary Minyen	6/20/1980
5644	Donna Bogue	6/18/1981
5823	Barry Knight	7/27/1981
5921	Cheryl Dejager	1/29/1982
7058	Judy Tuton	7/28/1983
7128	Michael Meimerstorf	9/15/1983
7233	Deborah Cherry	1/26/1984
7417	Phillis Treadwell	1/26/1984
8430	Vicki Schilling	1/26/1984
7652	Joyce McFarland	7/26/1984
7968	Michael Huggins	1/31/1985
8812	Eva Carman	7/31/1986
8839	Jerry Dicharry	7/31/1986
8878	Margaret Helsel	7/31/1986
9388	Karen Boggan	7/23/1987
9402	Philip Ceyler	7/23/1987
9545	Cicely Smith	7/23/1987
9993	David Long	7/28/1988
10623	Lisa Bergman	1/25/1990
12006	Jennifer Hoyt	1/28/1993
12460	Dorothy Bloomer	1/21/1994
12771	Theodore O'Brien	8/1/1994
12792	Thiyag Rajan	8/1/1994
12856	Jean Hamlett	11/18/1994
14520	Jimi Davidson	8/2/1999
15821	Richard Nijoka	1/23/2004

DECEASED REGISTRANTS:

CPAs:

Paul Brown	4414	Issued July 20, 1978
James Bryan	3451	Issued July 28, 1975
G. Busby	3354	Issued January 27, 1975
Phyllis Syth	5346	Issued July 25, 1980
Robert Terrell	2479	Issued February 1, 1971

PAs:

Paul Gordon

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Issued December 6, 1968

INACTIVE FIRMS:**CPA Corporations:**

Steve Beebe CPA PFS, Inc., A Professional Corporation
Locke & Associates, P.C.
Judith K. Ballard, C.P.A., P.C.

EXPERIENCE VERIFICATION APPLICATIONS APPROVED BY THE EXECUTIVE DIRECTOR:

Alexandra Bowers
Zachary Butler
Caroline Cantrell
Amber Day
Keegan Grooms
Hunter Hansen
Shelby Hackney
Bailey Jordan
Andrew King
Michael Lair
Eric McKinney
Ritabahen Patel
Adrian Shoecraft
Elbereth Smith
Joseph Urbon

2749.

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