

**STATE OF MARYLAND  
BOARD OF PUBLIC ACCOUNTANCY  
BUSINESS MEETING MINUTES  
May 4, 2021**

**LOCATION:** Google Meets Teleconference

**MEMBERS**

**IN ATTENDANCE:** James E. Marshall, Jr., Chair  
Macon M. Ware, III, Secretary  
Barrett E. Young  
Leslie Mostow  
Joe Petito  
Brian Dunne  
Dr. Jan L. Williams

**MEMBERS/STAFF**

**ABSENT:**

**DLLR OFFICIALS/STAFF:** Kausar Syed, Deputy Commissioner  
Shanai Jordan, Executive Director  
Christopher Dorsey, Assistant Executive Director  
Matthew Lawrence, Legal Counsel  
Linda L. Rhew, Administrative Officer

**OTHERS PRESENT:** Mary Beth Halpern, MACPA  
Bill Feehley, MSATP

The May 4, 2021, meeting of the Maryland Board of Public Accountancy was called to order at 9:01 AM by Chairman of the Board, James E. Marshall, Jr.

Upon a motion **(I)** by Mr. Mostow, and seconded by Mr. Ware, the minutes of the April 6, 2021, meeting were unanimously approved without corrections.

**Chairman's Report**

Chairman Marshall shared with the Board, AICPA and NASBA is having a free online event which will provide attendees with a thorough overview of the Model Curriculum. This free event will be held June 15, 2021 from 1:00 PM to 2:00 PM and June 16, 2021 from 1:30 to 3:00. The event is open to all who are interested, including members of the media. To attend, you do need to register online using this link: [CPA Evolution Model Curriculum Launch \(aahq.org\)](https://www.aahq.org/CPA-Evolution-Model-Curriculum-Launch)

Upon a motion **(II)** by Mr. Petito, and seconded by Mr. Mostow, the Board unanimously approved the Chairman's report.

**Executive Director's Report**

Ms. Jordan reminded the board members to complete their Ethics forms if they had not done so already. She also reported that the Maryland Board of Public Accountancy's office will be relocating sometime in the near future. Board meetings will continue to be held virtually until further notice.

Upon a motion **(III)** by Mr. Petito, and seconded by Mr. Ware, the Board unanimously approved the Executive Director's report.

### **Exam Appeals**

There were no exam appeals.

### **Education Report**

Dr. Williams presented the Education Report. There was one (1) Transfer of Grades application approval. The approved transfer of grades applications originated from CA. There was zero (0) transfer of grades application denials.

Upon a motion **(IV)** by Mr. Mostow, and seconded by Mr. Dunne, the Board unanimously approved the Education Report.

### **Experience Report**

Mr. Mostow presented the Experience Report. There was one (1) Reciprocal application approval, zero (0) Reciprocal application denial. The one (1) Reciprocal application approval originated from NC.

There were eight (8) Maryland candidate license application approvals and zero (0) Maryland candidate application denials.

Upon a motion **(V)** by Mr. Petito, and seconded by Mr. Ware, the Board unanimously approved the Experience Report.

### **Firm Permit Report**

Mr. Dunne presented the Firm Permit Report. There were two (2) Maryland firm permit application approvals with offices located in Maryland. There were zero (0) firm permit applications closed.

Upon a motion **(VI)** by Mr. Petito, and seconded by Mr. Young, the Board unanimously approved the Firm Permit Report.

### **Peer Review Oversight Committee Report**

Mr. Ware reported the following have occurred beginning April 1, 2021 and ending April 30, 2021: Two (2) new firms have enrolled in the Peer Review Program since April 1, 2021; six (6) firms have had reviews accepted since April 1, 2021; zero (0) firms have failed since April 1, 2021; zero (0) firms were dropped or terminated due to scheduling information not being received since April 1, 2021; and zero (0) firms have passed with deficiencies since April 1, 2021.

Upon a motion **(VII)** by Mr. Petito, and seconded by Mr. Young, the Board unanimously approved the Peer Review Report.

**New Business**

There was no New Business.

**Old Business**

Deputy Commissioner, Kausar Syed and Executive Director, Shanai Jordan discussed, explained, and answered questions concerning the CPA Board's budget for fiscal year 2021 with Board members.

**Correspondence**

There was no correspondence.

**Executive Session**

Upon a motion **(VIII)**, by Dr. Williams, and seconded by Mr. Petito, the Board went into a closed Executive Session at 9:28 AM via a Google meeting teleconference, where log-in information was only provided to Board members and staff. The purpose of this session was to consult with counsel. This session is permitted to be closed pursuant to Section 3-305(b) (7) of the General Provisions Article, Maryland Annotated Code. It returned to the regular business meeting at 9:33 AM upon a motion **(X)**, by Mr. Young, and seconded by Mr. Mostow.

**Return to Open Session**

Upon a motion **(XI)** by Dr. Williams, and seconded by Mr. Petito, the Board unanimously approved the motions made during Executive Session.

Upon a motion **(XII)** by Mr. Mostow, and seconded by Mr. Petito, the Board adjourned at 9:54 AM.

**NEXT MEETING:** June 15, 2021, via Google Meets teleconferencing at 9:00 AM

With corrections     Without corrections

Signature on original document

6/15/2021

\_\_\_\_\_  
Chairman

\_\_\_\_\_  
Date