



**VIRTUAL/TELECONFERENCE
ACCOUNTING EXAMINING BOARD
Virtual, 4822 Madison Yards Way, Madison
Contact: Will Johnson (608) 266-2112
August 20, 2025**

The following agenda describes the issues that the Board plans to consider at the meeting. At the time of the meeting, items may be removed from the agenda. Please consult the meeting minutes for a record of the actions of the Board.

AGENDA

9:00 A.M.

OPEN SESSION – CALL TO ORDER – ROLL CALL

A. Adoption of Agenda (1-3)

B. Approval of Minutes of May 21, 2025 (4-5)

C. Reminders: Conflicts of Interest, Scheduling Concerns

D. Introductions, Announcements and Recognition

E. Administrative Matters – Discussion and Consideration

1. Department, Staff and Board Updates
2. Board Members – Term Expiration Dates
 - a. Barron, Thuy T. – 7/1/2025
 - b. Friedman, Michael E. – 7/1/2027
 - c. Misey, Robert – 7/1/2025
 - d. Phillips, Joan – 7/1/2027
 - e. Reinemann, John – 7/1/2025
 - f. Schlichting, David K. – 7/1/2026
 - g. Strautmann, Susan M. – 7/1/2028

F. Legislation and Policy Matters – Discussion and Consideration

G. Administrative Rule Matters – Discussion and Consideration (6)

1. Pending and Possible Rulemaking Projects
 - a. Discussion: Educational requirements

H. Credentialing Matters – Discussion and Consideration (7-11)

1. Review of CPA Renewal Application (8-11)

I. National Association of State Boards of Accountancy (NASBA) Matters – Discussion and Consideration

1. Inclusion Committee Update – Thuy Barron
2. Communications Committee Update – Susan Strautmann

3. Great Lakes Region Call Update – Thuy Barron
 4. Ninth Edition of Uniform Accountancy Act (12)
- J. Wisconsin Institute of Certified Public Accountants (WICPA) Educators Committee – Discussion and Consideration
- K. Discussion and Consideration of Items Added After Preparation of Agenda
1. Introductions, Announcements and Recognition
 2. Administrative Matters
 3. Election of Officers
 4. Appointment of Liaisons and Alternates
 5. Delegation of Authorities
 6. Education and Examination Matters
 7. Credentialing Matters
 8. Practice Matters
 9. Legislative and Policy Matters
 10. Administrative Rule Matters
 11. Liaison Reports
 12. Public Health Emergencies
 13. Board Liaison Training and Appointment of Mentors
 14. Informational Items
 15. Division of Legal Services and Compliance (DLSC) Matters
 16. Presentations of Petitions for Summary Suspension
 17. Petitions for Designation of Hearing Examiner
 18. Presentation of Stipulations, Final Decisions and Orders
 19. Presentation of Proposed Final Decisions and Orders
 20. Presentation of Interim Orders
 21. Petitions for Re-Hearing
 22. Petitions for Assessments
 23. Petitions to Vacate Orders
 24. Requests for Disciplinary Proceeding Presentations
 25. Motions
 26. Petitions
 27. Appearances from Requests Received or Renewed
 28. Speaking Engagements, Travel, or Public Relation Requests, and Reports

L. Public Comments

CONVENE TO CLOSED SESSION to deliberate on cases following hearing (s. 19.85(1)(a), Stats.); to consider licensure or certification of individuals (s. 19.85(1)(b), Stats.); to consider closing disciplinary investigations with administrative warnings (ss. 19.85(1)(b), and 440.205, Stats.); to consider individual histories or disciplinary data (s. 19.85(1)(f), Stats.); and to confer with legal counsel (s. 19.85(1)(g), Stats.).

M. Division of Legal Services and Compliance (DLSC) Matters

1. **Proposed Stipulations, Final Decisions and Orders**
 - a. 23 ACC 015 – James A. Hollenbach (13-21)

N. Deliberation of Items Added After Preparation of the Agenda

1. Education and Examination Matters
2. Credentialing Matters
3. DLSC Matters

4. Monitoring Matters
5. Professional Assistance Procedure (PAP) Matters
6. Petitions for Summary Suspensions
7. Petitions for Designation of Hearing Examiner
8. Proposed Stipulations, Final Decisions and Order
9. Proposed Interim Orders
10. Administrative Warnings
11. Review of Administrative Warnings
12. Proposed Final Decisions and Orders
13. Matters Relating to Costs/Orders Fixing Costs
14. Case Closings
15. Board Liaison Training
16. Petitions for Assessments and Evaluations
17. Petitions to Vacate Orders
18. Remedial Education Cases
19. Motions
20. Petitions for Re-Hearing
21. Appearances from Requests Received or Renewed

O. Consulting with Legal Counsel

RECONVENE TO OPEN SESSION IMMEDIATELY FOLLOWING CLOSED SESSION

P. Vote on Items Considered or Deliberated Upon in Closed Session if Voting is Appropriate

Q. Open Session Items Noticed Above Not Completed in the Initial Open Session

ADJOURNMENT

NEXT MEETING: NOVEMBER 19, 2025

MEETINGS AND HEARINGS ARE OPEN TO THE PUBLIC, AND MAY BE CANCELLED WITHOUT NOTICE.

Times listed for meeting items are approximate and depend on the length of discussion and voting. All meetings are held virtually unless otherwise indicated. In-person meetings are typically conducted at 4822 Madison Yards Way, Madison, Wisconsin, unless an alternative location is listed on the meeting notice. In order to confirm a meeting or to request a complete copy of the board's agenda, please visit the Department website at <https://dsps.wi.gov>. The board may also consider materials or items filed after the transmission of this notice. Times listed for the commencement of any agenda item may be changed by the board for the convenience of the parties. The person credentialed by the board has the right to demand that the meeting at which final action may be taken against the credential be held in open session. Requests for interpreters for the hard of hearing, or other accommodations, are considered upon request by contacting the Affirmative Action Officer or reach the Meeting Staff by calling 608-267-7213.

**HYBRID (IN-PERSON/VIRTUAL)
ACCOUNTING EXAMINING BOARD
MEETING MINUTES
MAY 21, 2025**

PRESENT: Thuy Barron (*Virtual*), Michael Friedman (*arrived at 9:12 a.m.*), Robert Misey (*Virtual*), Joan Phillips, John Reinemann, Susan Strautmann (*Virtual*)

ABSENT: David Schlichting

STAFF: Will Johnson, Executive Director; Whitney DeVoe, Legal Counsel; Sofia Anderson, Administrative Rule Coordinator; Tracy Drinkwater, Board Administration Specialist; and other DSPS Staff

CALL TO ORDER

Joan Phillips, Chairperson, called the meeting to order at 9:09 a.m. A quorum of five (5) members was confirmed.

ADOPTION OF AGENDA

MOTION: John Reinemann moved, seconded by Thuy Barron, to adopt the Agenda as published. Motion carried unanimously.

APPROVAL OF MINUTES OF MARCH 12, 2025

MOTION: Susan Strautmann moved, seconded by John Reinemann, to approve the Minutes of March 12, 2025, as published. Motion carried unanimously.

Michael Friedman arrived at 9:12 a.m.

CLOSED SESSION

MOTION: Michael Friedman moved, seconded by Robert Misey, to convene to closed session to deliberate on cases following hearing (s. 19.85(1)(a), Stats.); to consider licensure or certification of individuals (s. 19.85(1)(b), Stats.); to consider closing disciplinary investigations with administrative warnings (ss. 19.85 (1)(b), and 440.205, Stats.); to consider individual histories or disciplinary data (s. 19.85 (1)(f), Stats.); and to confer with legal counsel (s. 19.85(1)(g), Stats.). Joan Phillips, Chairperson read the language of the motion. The vote of each member was ascertained by voice vote. Roll Call Vote: Thuy Barron-yes; Michael Friedman-yes; Robert Misey-yes; Joan Phillips-yes; John Reinemann-yes and Susan Strautmann-yes. Motion carried unanimously.

The meeting convened to Closed Session at 10:25 a.m.

**DELIBERATION ON DIVISION OF LEGAL SERVICES
AND COMPLIANCE (DLSC) MATTERS**

Proposed Stipulations, Final Decisions and Orders

21 ACC 001 – Neil O. Narveson

MOTION: Robert Misey moved, seconded by John Reinemann, to adopt the Findings of Fact, Conclusions of Law and Order in the matter of proceedings against Neil O. Narveson, DLSC Case Number 21 ACC 001. Motion carried unanimously.

RECONVENE TO OPEN SESSION

MOTION: Thuy Barron moved, seconded by Robert Misey, to reconvene into open session. Motion carried unanimously.

The meeting reconvened into Open Session at 10:28 a.m.

VOTE ON ITEMS CONSIDERED OR DELIBERATED UPON IN CLOSED SESSION

MOTION: John Reinemann moved, seconded by Thuy Barron, to affirm all motions made and votes taken in closed session. Motion carried unanimously.

(Be advised that any recusals or abstentions reflected in the closed session motions stand for the purposes of the affirmation vote.)

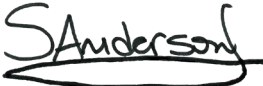
ADJOURNMENT

MOTION: Michael Friedman moved, seconded by John Reinemann, to adjourn the meeting. Motion carried unanimously.

The meeting adjourned at 10:30 a.m.

**State of Wisconsin
Department of Safety & Professional Services**

AGENDA REQUEST FORM

| | | | |
|--|--|---|--|
| 1) Name and title of person submitting the request: Sofia Anderson, Administrative Rules Coordinator | | 2) Date when request submitted: 08/08/2025 <small>Items will be considered late if submitted after 12:00 p.m. on the deadline date which is 8 business days before the meeting</small> | |
| 3) Name of Board, Committee, Council, Sections: Accounting Examining Board | | | |
| 4) Meeting Date: August 20, 2025 | 5) Attachments: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | 6) How should the item be titled on the agenda page? Administrative Rules Matters – Discussion and Consideration 1. Pending and Possible Rulemaking Projects a. Discussion: Educational requirements. | |
| 7) Place Item in: <input checked="" type="checkbox"/> Open Session <input type="checkbox"/> Closed Session | | 8) Is an appearance before the Board being scheduled? <i>(If yes, please complete Appearance Request for Non-DSPS Staff)</i> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No | 9) Name of Case Advisor(s), if required: N/A |
| 10) Describe the issue and action that should be addressed: Attachments: | | | |
| 11) Authorization <div style="display: flex; justify-content: space-between; align-items: flex-end; margin-top: 20px;"> <div style="text-align: center;">  <hr/> Signature of person making this request </div> <div style="text-align: center;"> 08/08/2025 <hr/> Date </div> </div> <div style="display: flex; justify-content: space-between; align-items: flex-end; margin-top: 10px;"> <div style="text-align: center;"> <hr/> Supervisor (if required) </div> <div style="text-align: center;"> <hr/> Date </div> </div> <div style="display: flex; justify-content: space-between; align-items: flex-end; margin-top: 10px;"> <div style="text-align: center;"> <hr/> Executive Director signature (indicates approval to add post agenda deadline item to agenda) </div> <div style="text-align: center;"> <hr/> Date </div> </div> | | | |
| Directions for including supporting documents: 1. This form should be attached to any documents submitted to the agenda. 2. Post Agenda Deadline items must be authorized by a Supervisor and the Policy Development Executive Director. 3. If necessary, provide original documents needing Board Chairperson signature to the Bureau Assistant prior to the start of a meeting. | | | |

**State of Wisconsin
Department of Safety & Professional Services**

AGENDA REQUEST FORM

| | | | | | | | | | | | | | | | |
|---|--|---|--|--------------|------------|---|------|--|--|--------------------------|------|--|--|--|--|
| 1) Name and Title of Person Submitting the Request: Joan Phillips, Chair | | 2) Date When Request Submitted: 08/08/2025 Items will be considered late if submitted after 4:30 p.m. and less than: ▪ 10 work days before the meeting for Medical Board ▪ 14 work days before the meeting for all others | | | | | | | | | | | | | |
| 3) Name of Board, Committee, Council, Sections: Accounting Examining Board | | | | | | | | | | | | | | | |
| 4) Meeting Date: 08/20/2025 | 5) Attachments: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 6) How should the item be titled on the agenda page? Credentialing Matters –Discussion and Consideration 1) Review of CPA Renewal Application | | | | | | | | | | | | | |
| 7) Place Item in: <input checked="" type="checkbox"/> Open Session <input type="checkbox"/> Closed Session <input type="checkbox"/> Both | 8) Is an appearance before the Board being scheduled? <input type="checkbox"/> Yes (Fill out Board Appearance Request) <input checked="" type="checkbox"/> No | 9) Name of Case Advisor(s), if required: | | | | | | | | | | | | | |
| 10) Describe the issue and action that should be addressed: | | | | | | | | | | | | | | | |
| 11) Authorization <table style="width: 100%;"> <tr> <td style="width: 60%;">Will Johnson</td> <td style="width: 40%; text-align: right;">08/08/2025</td> </tr> <tr> <td>Signature of person making this request</td> <td style="text-align: right;">Date</td> </tr> <tr> <td colspan="2" style="height: 20px;"></td> </tr> <tr> <td>Supervisor (if required)</td> <td style="text-align: right;">Date</td> </tr> <tr> <td colspan="2" style="height: 20px;"></td> </tr> <tr> <td colspan="2">Executive Director signature (indicates approval to add post agenda deadline item to agenda) Date</td> </tr> </table> | | | | Will Johnson | 08/08/2025 | Signature of person making this request | Date | | | Supervisor (if required) | Date | | | Executive Director signature (indicates approval to add post agenda deadline item to agenda) Date | |
| Will Johnson | 08/08/2025 | | | | | | | | | | | | | | |
| Signature of person making this request | Date | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| Supervisor (if required) | Date | | | | | | | | | | | | | | |
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Accountant, Certified Public Current Renewal Screenshots

Accountant, Certified Public - Renewal

Steps

● Instructions

● Personal Information

● Attestations

● Declarations

● Continuing Education

● Supporting Documents

● Payment

Instructions

Welcome, let's begin your renewal.

If you have questions about your renewal, you may call our office at (608) 266-2112 or email dpsrenewal@wisconsin.gov. Once your renewal is complete and your license is renewed, you will receive an email with a link to print a copy of your license with the updated expiration date.

Next

Accountant, Certified Public - Renewal

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● Declarations

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● Payment

Personal Information

Per Wis. Stat. 440.14, if you are individual or sole proprietor, you may declare that your street address and/or PO Box# not be disclosed on any list of ten or more credential holders that the department furnishes to another person. Please check the box to make this declaration.

☐ Please do not disclose my street address and/or PO Box# on lists.

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Attestations

Please fill all the attestations to proceed.

Affidavit of credential Holder

I declare that I am the person referred to on this application and that all answers set forth are each and all strictly true in every respect. I understand that failure to provide requested information, making any materially false statement and/or giving any materially false information in connection with my application for a license/credential or for renewal or reinstatement of a license/credential may result in license/credential application processing delays; denial, revocation, suspension or limitation of my license/credential; or any combination thereof; or such other penalties as may be provided by law. I further understand that if I am issued a license/credential renewal, or reinstatement thereof, failure to comply with the statutes and/or administrative code provisions of the licensing authority may be cause for disciplinary action.

☐ I have read and understand the above Affidavit of credential holder statement.

Continuing Duty of Disclosure

I understand that I have a continuing duty of disclosure as long as my license/credential is current and valid. If information I have provided becomes invalid, incorrect or outdated, since the last renewal or issuance of my license/credential, I understand that I am obliged to provide any information to ensure the information on file for my license/credential remains current, valid, and truthful. I understand that the Department of Safety and Professional Services may view acts of omission as dishonesty and that my duty of disclosure exists as long as my license/credential is current and valid.

☐ I have read and I understand the above continuing duty of disclosure statement.

Affidavit/Licensee Charges or Conviction

A holder of any of the credentials/licenses set forth in Wis. Stat. s. 440.03(13)(b) who is convicted of a felony or misdemeanor, since the issuance of the license/credential or since the last renewal, in the state or elsewhere shall notify the department in writing of the date, place and nature of the conviction or finding within 48 hours after the entry of the judgment of conviction. Notice shall be made by mail and shall be proven by showing proof of the date of mailing the notice. Notice shall include a copy of the judgment of conviction and a copy of the complaint or other information which describes the nature of the crime and the judgment of conviction in order that the department may determine whether the circumstances of the crime of which the license/credential holder was convicted are substantially related to the practice of the license/credential holder. [Form #2254](#) should be completed and submitted to the department along with the associated fees and all requested documents.

☐ I have read and understand the above statement regarding the responsibility to report any felony or misdemeanor conviction since the issuance or last renewal of my license.

All applications for professional licenses/credentials are checked to determine whether the applicant is liable for delinquent state taxes.*6) If you are liable for delinquent state taxes, pay the delinquent amount before the application process is completed. Retain proof that you have satisfied the tax delinquency. If you have any questions about payment of delinquent taxes, please contact your nearest Department of Revenue office or call (608)261-6249.

An application may be denied or a license/credential suspended if an applicant or license/credential holder is delinquent in paying support or fails to comply with a subpoena or warrant issued by the department of workforce development or a county child support agency related to support or paternity proceedings.*2)

*6 - Section 440.12, Wis. Stats.

*2 - Sections 49.22, and 440.13, Wis. Stats.

Acknowledgement to continue

By clicking "Save & Next" below, I am signifying that I have read the above statements (Continuing Duty of Disclosure, License/Credential Holder Charges or Convictions, and Affidavit of Applicant) and understand the obligation I have as a license/credential-holder should the information I've provided to the Department of Safety and Professional Services change.

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- **Declarations**
- Continuing Education
- Supporting Documents
- Payment

Declarations

If you do not have a Social Security Number on file with us or are exempt from having a Social Security Number, and/or your legal status as a qualified alien or nonimmigrant lawfully present in the United States has changed since your last renewal (or the issuance of your license/credential if you have not renewed before), please contact the DSPS at 608-266-2112 or dpsrenewal@wisconsin.gov

☐ I have read and understood the above legal status statement.

* Since your last renewal or initial licensure (if this is your first renewal), do you have any pending charges, prior convictions* and/or have you violated any federal or state laws, or any local ordinances (ordinance violations do not include minor traffic violations that do not involve alcohol or drugs, such as speeding, running stoplights, and seat belt violations)?

*Expunged convictions must be reported

- ☐ I have pending charges, prior convictions, and/or ordinance violations
- ☐ I do not have pending charges, prior convictions, and/or ordinance violations

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Continuing Education

* Continuing Education Certification

☐ I have completed 80 continuing professional education (CPE) credits during the past 24 month compliance period (December 15, 2021 to December 14, 2023) as required by Acy s. 2.602. I completed at least 20 of the required CPE credits during each 12 month segment within the 24 month compliance period. At least 40 of the CPE credits completed during the past 24 month compliance period were obtained by completing formal learning activities as defined under Acy s. 2.603 (2), of which at least 3 CPE credits were related to ethics.

☐ I have not completed the 80 required continuing professional education (CPE) credits during the past 24 month compliance period. I will complete any remaining CPE credits within the 12 month carryback period ending on December 14, 2024, as provided under Acy s. 2.602 (8). I understand that if I fail to complete the required 80 CPE credits before December 15, 2023, my license will be expired, and I must cease practicing as a certified public accountant in this state until my license has been reinstated pursuant to Acy s. 2.602 (9). Failure to complete the required CPE credits prior to the end of the 12 month carryback period on December 14, 2024 will result in the expiration of my license on that date, and I must cease engaging in the practice of certified public accounting in this state until my license has been renewed or reinstated.

☐ I am an inactive certificate holder or would like to transition to an inactive certificate holder under Acy 2.602 (5) (b). I am therefore exempt from completing any continuing professional education (CPE) credits during the past 24 month compliance period. I understand that I may not practice as certified public accountant unless I renew or reinstate my license.

☐ My credential was issued between 12/15/2021 and 12/14/2022. I have complete 40 hours of continuing professional education (CPE) as required by Acy 2.602.

☐ My credential was issued after 12/15/2022. I am exempt from continuing professional education (CPE).

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Supporting Documents

Only upload Form 2254 if you have any **new convictions or pending charges** since your last renewal or initial licensure if this is your first renewal. When documents are uploaded to your renewal application, it triggers a manual review of your application whether the documents are required or not.

| Documents | Title | Who Submits? | Actions |
|-----------|---|--------------|-------------------|
| | Personal Statement | Applicant | 📄 |
| | Conviction and Pending Charges Form #2254 | Applicant | 📄 |
| | AODA Assessment/Current use Statement | Applicant | 📄 |
| | Sentencing Verification | Applicant | 📄 |
| | Police Report/Criminal Complaint | Applicant | 📄 |
| | Judgment of Conviction | Applicant | 📄 |
| | Other | Applicant | 📄 |

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Accountant, Certified Public - Renewal

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- ✓ Supporting Documents
- **Payment**

Payment

Please be aware that payments using a checking/savings account may take 3-5 business days to process.

| Category | Response | Cost |
|--------------|----------|----------------|
| Renewal Fee | | \$43.00 |
| Total | | \$43.00 |

The total amount to be paid for this license application is **\$43.00**

Please click the "Pay and Submit" button to proceed with the chosen payment method.

[Previous](#)[Pay and Submit](#)

Instruction Page

Welcome, let's begin your renewal.

If you have questions about your renewal, please submit a support ticket by clicking “Request Support” in the blue banner on the top of this page. Provide complete contact information and a detailed description of the issue you’re experiencing. Include your date of birth and the last 4 digits of your SSN, so that we can verify your identity. Once your renewal is complete and your license is renewed, you will receive an email with a link to print a copy of your license with the updated expiration date.

Personal Information Page

Add below verbiage already there

You are required to update your name and address within 30 days of the change per [Wis State Stat 440.11](#) To make changes, you will need to be logged into your account and click on the Amendment Tab to request a change. Please note that name changes require documentation of the name change before being submitted.

Email address, Phone Number and Gender changes can be made by clicking on the down arrow by your name in the upper right corner of your account. Then click on My Profile. Click on the Edit Profile button to make changes.

Declarations Page

Individual Conviction Statement (updated 4/2025)

Declarations

If you do not have a Social Security Number on file with us or are exempt from having a Social Security Number, and/or your legal status as a qualified alien or nonimmigrant lawfully present in the United States has changed since your last renewal (or the issuance of your license/credential if you have not renewed before), please contact the DSPS at [608-266-2112](tel:608-266-2112) or dpsrenewal@wisconsin.gov

☒ I have read and understood the above legal status statement.

Since your last renewal (or initial licensure if this is your first renewal), do you have any pending charges, convictions and/or have you violated any federal or state laws, or any local ordinances (for ordinance violations you do not need to include minor traffic violations that do not involve alcohol or drugs, such as speeding or seat belt violations)? *Expunged convictions must be reported.

☒ I have pending charges, prior convictions, and/or ordinance violations

☐ I do not have pending charges, prior convictions, and/or ordinance violations

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Since your last renewal (or initial licensure if this is your first renewal), do you have any pending charges, convictions and/or have you violated any federal or state laws, or any local ordinances (for ordinance violations you do not need to include minor traffic violations that do not involve alcohol or drugs, such as speeding or seat belt violations)?

*Expunged convictions must be reported.

- ☐ **NO**, I DO NOT HAVE pending charges, convictions, and/or ordinance violations to report.
- ☐ **YES**, I HAVE pending charges, convictions, and/or ordinance violations to report.

**State of Wisconsin
Department of Safety & Professional Services**

AGENDA REQUEST FORM

| | | | | | | | | | | | | | | | |
|---|--|---|--|--------------|------------|---|------|--|--|--------------------------|------|--|--|--|--|
| 1) Name and Title of Person Submitting the Request: Will Johnson, Executive Director | | 2) Date When Request Submitted: 08/08/2025 <div style="border: 1px solid black; padding: 5px;"> Items will be considered late if submitted after 4:30 p.m. and less than: ▪ 10 work days before the meeting for Medical Board ▪ 14 work days before the meeting for all others </div> | | | | | | | | | | | | | |
| 3) Name of Board, Committee, Council, Sections: Accounting Examining Board | | | | | | | | | | | | | | | |
| 4) Meeting Date: 08/20/2025 | 5) Attachments: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No | 6) How should the item be titled on the agenda page? NASBA Matters –Discussion and Consideration - Ninth Edition of Uniform Accountancy Act | | | | | | | | | | | | | |
| 7) Place Item in: <input checked="" type="checkbox"/> Open Session <input type="checkbox"/> Closed Session <input type="checkbox"/> Both | 8) Is an appearance before the Board being scheduled? <input type="checkbox"/> Yes (Fill out Board Appearance Request) <input checked="" type="checkbox"/> No | 9) Name of Case Advisor(s), if required: | | | | | | | | | | | | | |
| 10) Describe the issue and action that should be addressed: NASBA release link: https://nasba.org/blog/2025/07/22/nasba-and-aicpa-publish-ninth-edition-of-the-uniform-accountancy-act-uaa/ | | | | | | | | | | | | | | | |
| 11) Authorization <table style="width: 100%;"> <tr> <td style="width: 60%;">Will Johnson</td> <td style="width: 40%; text-align: right;">08/08/2025</td> </tr> <tr> <td>Signature of person making this request</td> <td style="text-align: right;">Date</td> </tr> <tr> <td colspan="2" style="height: 20px;"></td> </tr> <tr> <td>Supervisor (if required)</td> <td style="text-align: right;">Date</td> </tr> <tr> <td colspan="2" style="height: 20px;"></td> </tr> <tr> <td colspan="2">Executive Director signature (indicates approval to add post agenda deadline item to agenda) Date</td> </tr> </table> | | | | Will Johnson | 08/08/2025 | Signature of person making this request | Date | | | Supervisor (if required) | Date | | | Executive Director signature (indicates approval to add post agenda deadline item to agenda) Date | |
| Will Johnson | 08/08/2025 | | | | | | | | | | | | | | |
| Signature of person making this request | Date | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | |
| Supervisor (if required) | Date | | | | | | | | | | | | | | |
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| Executive Director signature (indicates approval to add post agenda deadline item to agenda) Date | | | | | | | | | | | | | | | |
| Directions for including supporting documents: 1. This form should be attached to any documents submitted to the agenda. 2. Post Agenda Deadline items must be authorized by a Supervisor and the Policy Development Executive Director. 3. If necessary, Provide original documents needing Board Chairperson signature to the Board Admin Specialist prior to the start of a meeting. | | | | | | | | | | | | | | | |