



**California Board of Accountancy**  
2450 Venture Oaks Way, Suite 300  
Sacramento, CA 95833

phone: (916) 263-3680 fax: (916) 263-3675 web: [www.cba.ca.gov](http://www.cba.ca.gov)



**CALIFORNIA BOARD OF ACCOUNTANCY  
PUBLIC MEETING NOTICE FOR THE LEGISLATIVE COMMITTEE, COMMITTEE ON  
PROFESSIONAL CONDUCT, AND CALIFORNIA BOARD OF ACCOUNTANCY MEETINGS**

**California Board of Accountancy  
2450 Venture Oaks Way, Suite 420  
Sacramento, CA 95833  
Telephone: (916) 263-3680**

**Legislative Committee Meeting  
Thursday, March 23, 2023, 9:00 a.m.**

**Committee on Professional Conduct Meeting  
Thursday, March 23, 2023, 9:30 a.m.  
Or Upon Adjournment of the Legislative Committee Meeting**

**California Board of Accountancy Meeting  
Thursday, March 23, 2023, 10:00 a.m.  
Or Upon Adjournment of the Committee on Professional Conduct Meeting**

**California Board of Accountancy Meeting  
Friday, March 24, 2023, 9:00 a.m. until adjournment**

The California Board of Accountancy will hold a public meeting via in-person and WebEx pursuant to the provisions of Government Code section 11133.

Enclosed for your information is a copy of the agendas for the Legislative Committee, Committee on Professional Conduct, and California Board of Accountancy meetings on March 23-24, 2023.

The committee and California Board of Accountancy meetings will commence at 9:00 a.m. or later. The order, start times, or both, of the committee meetings and the California Board of Accountancy meeting are subject to change without notice. Agenda items may be discussed and action taken out of order at the discretion of the California Board of Accountancy President or Committee Chair for convenience, to accommodate speakers, or to maintain a quorum. Identified presenters are subject to change.

**INSTRUCTIONS FOR PARTICIPATING VIRTUALLY:**

If joining the Thursday, March 23, 2023 meetings:

Event address for attendees: <https://dca-meetings.webex.com/dca-meetings/j.php?MTID=m00546e00cce3530b374e297a5236ce83>

*If joining using the link above*

Webinar number: 2485 305 5249

Webinar password: CBA03232023

## CBA Meeting March 23-24, 2023

Page 2 of 2

### If joining by phone

+1-415-655-0001 US Toll

Access code: 248 530 55249

Passcode: 22203232

If joining the Friday, March 24, 2023 meetings by computer:

Event address for attendees: <https://dca-meetings.webex.com/dca-meetings/j.php?MTID=m8b4dfb0aa90648918b102a37711e9121>

### If joining using the link above

Webinar number: 2494 602 7778

Webinar password: CBA03242023

### If joining by phone

+1-415-655-0001 US Toll

Access code: 249 460 27778

Passcode: 22203242

Instructions on how to observe and participate in the meeting using the WebEx platform can be found on the California Board of Accountancy's [website](#).

Members of the public may, but are not obligated to, provide their names or personal information as a condition of observing or participating in the meeting. When signing into the WebEx platform, participants may be asked for their name and email address. Participants who choose not to provide their names will be required to provide a unique identifier, such as their initials or another alternative, so that the meeting moderator can identify individuals who wish to make a public comment. Participants who choose not to provide their email address may utilize a fictitious email address in the following sample format: [XXXXX@mailinator.com](#).

Public comments will be limited to five minutes per person unless, in the discretion of the California Board of Accountancy President or Committee Chair, circumstances require a shorter period. Members of the public will not be permitted to "yield" their allotted time to other members of the public to make comments.

Click [here](#) for information on how to interact and participate during a public meeting.

The meetings are accessible to individuals who are physically disabled. A person who needs a disability-related accommodation or modification in order to participate in the meeting may make a request by contacting Rebecca Reed at (916) 561-1716, or email [rebecca.reed@cba.ca.gov](mailto:rebecca.reed@cba.ca.gov), or send a written request to the California Board of Accountancy at 2450 Venture Oaks Way, Suite 300, Sacramento, CA 95833. Providing your request at least five (5) business days before the meeting will help to ensure availability of the requested accommodation.



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**CBA MISSION: To protect consumers by ensuring only qualified licensees practice public accountancy in accordance with established professional standards.**

**CALIFORNIA BOARD OF ACCOUNTANCY  
 LEGISLATIVE COMMITTEE**

**MEETING AGENDA**

**Thursday, March 23, 2023, 9:00 a.m.**

**California Board of Accountancy  
 2450 Venture Oaks Way, Suite 420  
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**Important Notice to the Public**

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**Call to Order, Roll Call, Establishment of Quorum, and Opening Remarks  
 (Joseph Rosenbaum, CPA).**

<b><u>Agenda Item</u></b>	<b><u>CBA Item #</u></b>
I. Public Comments for Items not on the Agenda.*	
II. Approve Minutes of the January 26, 2023 Legislative Committee Meeting.	IX.C.
III. Review and Consideration of Possible Positions on Legislation (David Hemphill, Information and Planning Officer).	XVI.A.2.

<u>Agenda Item</u>	<u>CBA Item #</u>
IV. Update on Legislative Proposals for the California Board of Accountancy ( <b>David Hemphill, Information and Planning Officer</b> ).	XVI.A.3.
V. Review and Possible Consideration of Positions on Legislation the California Board of Accountancy is Monitoring. ( <b>David Hemphill, Information and Planning Officer</b> )	XVI.A.4.
A. Assembly Bill 469 – California Public Records Act Ombudsperson.	
B. Assembly Bill 477 – Legislative Review of State Boards.	
C. Assembly Bill 820 – State Boards and Commissions: Seniors.	
D. Assembly Bill 913 – Professions and Vocations.	
E. Assembly Bill 916 – Administrative Procedure Act: Office of Administrative Law: Director.	
F. Assembly Bill 996 – Department of Consumer Affairs: Continuing Education: Conflict-of-Interest Policy.	
G. Assembly Bill 1070 – Department of Consumer Affairs: Vacancies.	
H. Assembly Bill 1101 – Department of Consumer Affairs.	
I. Senate Bill 24 – Department of Consumer Affairs.	
J. Senate Bill 247 – Department of Consumer Affairs.	
K. Senate Bill 259 – Reports Submitted to Legislative Committees.	
L. Senate Bill 279 – Administrative Regulations: Public Participation.	
M. Senate Bill 358 – Professional Licenses: Military Service.	
N. Senate Bill 372 – Department of Consumer Affairs: Licensee and Registrant Records: Name and Gender Changes.	
O. Senate Bill 510 – State Government: Mailed Notice.	
P. Senate Bill 702 – Gubernatorial Appointments.	
Q. Senate Bill 764 – Department of Consumer Affairs: Regulatory Boards: Removal of Board Members.	
R. Senate Bill 770 – State Boards and Commissions.	
S. Senate Bill 802 – Licensing Boards: Disqualification From Licensure: Criminal Conviction.	
T. Senate Bill 812 – Tax Preparers: Notices: Social Media Accounts.	
U. Senate Bill 816 – Interior Designers.	
V. Senate Bill 820 – Consumer Complaints.	
VI. Agenda Items for Next Meeting.	
Adjournment.	

In accordance with the Bagley-Keene Open Meeting Act, all meetings of the California Board of Accountancy are open to the public. While the California Board of Accountancy intends to webcast this meeting, it may not be possible to webcast the entire open meeting due to limitations on resources or technical difficulties.

\*Government Code section 11125.7 provides the opportunity for the public to address each agenda item during discussion or consideration by the Legislative Committee prior to the Legislative Committee taking any action on said item. Members of the public will be provided appropriate opportunities to comment on any issue before the Legislative Committee, but the Legislative Committee Chair may, at his or her discretion, apportion available time among those who wish to speak. Individuals may appear before the Legislative Committee to discuss items not on the agenda; however, the Legislative Committee can neither discuss nor take official action on these items at the time of the same meeting (Government Code sections 11125, 11125.7(a)).

California Board of Accountancy members who are not members of Legislative Committee may be attending the meeting. However, if a majority of members of the full board are present at the Legislative Committee meeting, members who are not Legislative Committee members may attend the meeting only as observers.

The meeting is accessible to individuals who are physically disabled. A person who needs a disability-related accommodation or modification in order to participate in the meeting may make a request by contacting Rebecca Reed at (916) 561-1716, or email [rebecca.reed@cba.ca.gov](mailto:rebecca.reed@cba.ca.gov), or send a written request to the California Board of Accountancy at 2450 Venture Oaks Way, Ste. 300, Sacramento, CA 95833. Providing your request at least five (5) business days before the meeting will help to ensure availability of the requested accommodation.



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**CALIFORNIA BOARD OF ACCOUNTANCY  
 COMMITTEE ON PROFESSIONAL CONDUCT**

**MEETING AGENDA**

**Thursday, March 23, 2023, 9:30 a.m.  
 Or Upon Adjournment of the Legislative Committee Meeting**

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**Important Notice to the Public**

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**Call to Order, Roll Call, Establishment of Quorum, and Opening Remarks  
 (Kristian Latta, CPA, Chair).**

<b><u>Agenda Item</u></b>	<b><u>CBA Item #</u></b>
I. Public Comments for Items Not on the Agenda.*	
II. Approve Minutes of the January 26, 2023 Committee on Professional Conduct Meeting.	XIV.D.

**Agenda Item**

**CBA Item #**

- III. Discussion and Possible Action to Consider Changes to Previously Proposed Text and Reauthorization of a Regular Rulemaking to Amend California Code of Regulations, Title 16, Section 41 – Firm Responsibilities and Section 50.1 – Client Notification, Regarding Accounting Firms Providing Attest Services With Ownership Comprised Solely of Certified Public Accountants Who Have Not Completed the Attest Experience Requirement (**Sarah Fletcher, Enforcement Analyst**). XVI.B.2.
  
- IV. Discussion and Possible Action on the National Association of State Boards of Accountancy’s Revised Proposed Amendments to the *Uniform Accountancy Act Model Rules* (**Michelle Center, Chief, Licensing Division**) XVI.B.3.
  
- V. Agenda Items for Next Meeting.

Adjournment.

In accordance with the Bagley-Keene Open Meeting Act, all meetings of the California Board of Accountancy are open to the public. While the California Board of Accountancy intends to webcast this meeting, it may not be possible to webcast the entire open meeting due to limitations on resources or technical difficulties.

\*Government Code section 11125.7 provides the opportunity for the public to address each agenda item during discussion or consideration by the Committee on Professional Conduct prior to the Committee on Professional Conduct taking any action on said item. Members of the public will be provided appropriate opportunities to comment on any issue before the Committee on Professional Conduct, but the Committee on Professional Conduct Chair may, at their discretion, apportion available time among those who wish to speak. Individuals may appear before the Committee on Professional Conduct to discuss items not on the agenda; however, the Committee on Professional Conduct can neither discuss nor take official action on these items at the time of the same meeting (Government Code sections 11125, 11125.7(a)).

California Board of Accountancy members who are not members of the Committee on Professional Conduct may be attending the meeting. However, if a majority of members of the full board are present at the Committee on Professional Conduct meeting, members who are not Committee on Professional Conduct members may attend the meeting only as observers.

The meeting is accessible to individuals who are physically disabled. A person who needs a disability-related accommodation or modification in order to participate in the meeting may make a request by contacting Rebecca Reed at (916) 561-1716, or email [rebecca.reed@cba.ca.gov](mailto:rebecca.reed@cba.ca.gov), or send a written request to the California Board of Accountancy at 2450 Venture Oaks Way, Suite 300, Sacramento, CA 95833. Providing your request at least five (5) business days before the meeting will help to ensure availability of the requested accommodation.



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**DEPARTMENT OF CONSUMER AFFAIRS  
 CALIFORNIA BOARD OF ACCOUNTANCY**

**MEETING AGENDA**

**Thursday, March 23, 2023, 10:00 a.m.**

**Or upon adjournment of the Committee on Professional Conduct Meeting**

**Friday, March 24, 2023, 9:00 a.m.**

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Thursday,  
 March 23, 2023

**Call to Order, Roll Call, Establishment of Quorum, and Opening Remarks (Katrina L. Salazar, CPA, President).**

**Agenda Item**

**10:00 a.m. –  
 10:05 a.m.**

I. Public Comments for Items Not on the Agenda.\*

**10:05 a.m. –  
 12:00 p.m.**

II. Report of the President.

A. Introduction of New California Board of Accountancy Member Tong “Tony” Lin.



## **Agenda Item**

- B. National Association of State Boards of Accountancy Committee Interest Form.
- C. Resolution for Retiring Enforcement Advisory Committee Member, Nathan Cowley, CPA.
- D. Resolution for Retiring Qualifications Committee Member, José Palma, CPA.
- E. Resolution for Retired Consideration of the CPA Experience Requirements Taskforce Member, Daniel J. Dustin, CPA.
- F. Resolution for Retired Consideration of the CPA Experience Requirements Taskforce Member, David Senteney, PhD., CPA.
- G. Resolution for Retired Consideration of the CPA Experience Requirements Taskforce Member, Rich Simitian, CPA.
- H. Overview of the Peer Review Oversight Committee's Annual Administrative Site Visit Process (**Michelle Center, Chief, Licensing Division**).
- I. Discussion and Possible Action Regarding Challenges Associated with the Peer Review Program (**Michelle Center, Chief, Licensing Division**).
- J. Discussion and Possible Action to Approve the Project to Review and Clarify Educational Requirements for Certified Public Accountant Licensure (**Michelle Center, Chief, Licensing Division/Michael Lieberman, Manager, Initial Licensing Unit**).
- K. Discussion and Possible Action Regarding the American Institute of Certified Public Accountants Draft *8-Point Plan to Address the CPA Pipeline* (**Michelle Center, Chief, Licensing Division/Michael Lieberman, Manager, Initial Licensing Unit**).
- L. Overview of the Uniform Certified Public Accountant Examination Blueprints (**Eulalio Ortega, Manager, Examination Unit**).
- M. Discussion and Review of Board Action and Response to Prior Issues and New Issues for Inclusion in the California Board of Accountancy 2024 Sunset Review Report (**David Hemphill, Information and Planning Officer**).

## Agenda Item

- N. Discussion and Possible Adoption of the Proposed 2024 California Board of Accountancy Meeting Dates (**Rebecca Reed, Board Relations Analyst**).
- O. Department of Consumer Affairs Director's Report on Departmental Activities (**Judie Bucciarelli, Manager, Board and Bureau Relations, Department of Consumer Affairs**).
- 12:00 p.m. – 12:15 p.m. III. Report of the Vice President (**Yen C. Tu, Vice President**).
- A. Recommendations for Appointment(s)/Reappointment(s) to the Enforcement Advisory Committee.
- B. Recommendations for Appointment(s)/Reappointment(s) to the Qualifications Committee.
- C. Recommendations for Appointment(s)/Reappointment(s) to the Peer Review Oversight Committee.
- 12:15 p.m. – 12:30 p.m. IV. Report of the Secretary/Treasurer (**Joseph Rosenbaum, CPA, Secretary/Treasurer**).
- A. Discussion of the Fiscal Year 2022-23 Mid-Year Financial Statement.
- 12:30 p.m. – 1:30 p.m. Lunch.
- 1:30 p.m. Time Certain V. Petition Hearings.
- A. David Bruner, CPA 73235 – Petition for Reinstatement of a Restricted Area of Practice and Reduction of Penalty.
- B. Joe DiBenedetto, CPA 73278 – Petition for Reinstatement of Revoked Certificate.
- VI. Closed Session: Pursuant to Government Code Section 11126(c)(3), the California Board of Accountancy will Convene into Closed Session to Deliberate on the Petitions.
- VII. Closed Session: Pursuant to Government Code Section 11126(e), the California Board of Accountancy Will Convene into Closed Session to Receive Advice From Legal Counsel on Litigation.
- A. *Lanfeng Zhao and ELZ Accountancy Corporation v. California Board of Accountancy*, Los Angeles Superior Court, Case No. 18STCP02951.

**Agenda Item**

B. *Michael D. Robinson v. California Board of Accountancy*, San Francisco County Superior Court, Case No. CPF-19-516602.

VIII. Closed Session: Pursuant to Government Code Section 11126(c)(3), the California Board of Accountancy Will Convene into Closed Session to Deliberate on Enforcement Matters.

Friday,  
March 24, 2023

**Call to Order, Roll Call, Establishment of Quorum, and Opening Remarks (Katrina L. Salazar, CPA, President).**

**9:00 a.m. –  
9:20 a.m.**

IX. Report of the Executive Officer (**Dominic Franzella, Acting Executive Officer**).

A. Report of the Administration Division (**Christy Abate, Manager, Administrative Services**).

B. Update on the California Board of Accountancy's Communications and Outreach (**David Hemphill, Information and Planning Officer**).

**9:20 a.m. –  
9:35 a.m.**

X. Report on the Enforcement Advisory Committee, Qualifications Committee, and Peer Review Oversight Committee.

A. Enforcement Advisory Committee (**Doug Aguilera, CPA, Chair**).

There is no report on this agenda item.

B. Qualifications Committee (**Michael L. Williams, CPA, Chair**).

There is no report on this agenda item.

C. Peer Review Oversight Committee (**Laura L. Ross, CPA, Chair**).

1. Report of the February 17, 2023 Peer Review Oversight Committee Meeting.

2. Presentation and Possible Adoption of the Proposed Peer Review Oversight Committee 2022 Annual Report.

**9:35 a.m. –  
9:50 a.m.**

XI. Regulations.

## Agenda Item

- A. Discussion and Possible Action to Consider Public Comments on and Adopt California Code of Regulations, Title 16, Section 54.3 – Sale or Transfer of Licensee’s Practice and Section 54.4 – Discontinuance of Licensee’s Practice (**Sarah Fletcher, Enforcement Analyst**).
- 9:50 a.m. – 10:05 a.m.** XII. Report of the Enforcement Chief (**Kari O’Connor, Deputy Chief, Enforcement Division**).
- A. Enforcement Activity Report.
- 10:05 a.m. – 10:20 a.m.** XIII. Report of the Licensing Chief (**Michelle Center, Chief, Licensing Division**).
- A. Licensing Activity Report (**Matthew Parsons, Coordinator, License Renewal and Continuing Competency Unit**).
- B. Report on Long Term Licensing Data Trends (**Sarah Benedict, Manager, License Renewal and Continuing Competency Unit**).
- 10:20 a.m. – 10:30 a.m.** XIV. Meeting Minutes (**Katrina L. Salazar, CPA, President**).
- A. Adoption of the Minutes of the January 26-27, 2023 California Board of Accountancy Meeting.
- B. Adoption of the Minutes of the January 26, 2023 Consideration of the CPA Experience Requirements Taskforce Meeting.
- C. Acceptance of the Minutes of the January 26, 2023 Legislative Committee Meeting.
- D. Acceptance of the January 26, 2023 Committee on Professional Conduct Meeting.
- E. Acceptance of the Minutes of the December 9, 2022 Peer Review Oversight Committee Meeting.
- 10:30 a.m. – 10:45 a.m.** Morning Break.
- 10:45 a.m. – 11:00 a.m.** XV. Other Business.
- A. American Institute of Certified Public Accountants.

## Agenda Item

1. Report on Meetings of the American Institute of Certified Public Accountants Attended by a California Board of Accountancy Representative.

a. Board of Examiners (**Katrina L. Salazar, CPA**).

b. State Board Committee (**Katrina L. Salazar, CPA**).

B. National Association of State Boards of Accountancy.

1. Report of the National Association of State Boards of Accountancy Director-at-Large (**Katrina L. Salazar, CPA**).

2. Report of the National Association of State Boards of Accountancy Pacific Regional Director (**Nancy J. Corrigan, CPA**).

3. Report on Activities of Meetings of the National Association of State Boards of Accountancy Attended by a California Board of Accountancy Member.

a. Education Committee (**Nancy J. Corrigan, CPA, Chair**).

b. Relations With Member Boards Committee (**Nancy J. Corrigan, CPA**).

c. Communications Committee (**Yen C. Tu**).

d. Diversity Committee (**Katrina L. Salazar, CPA, Chair**).

e. Nominating Committee (**Michael M. Savoy, CPA**).

There is no report on this agenda item.

f. Report of the February 27-March 1, 2023 Annual Conference for Executive Directors and Board Staff and the Annual Conference for Board of Accountancy Legal Counsel (**Dominic Franzella, Acting Executive Officer**).

11:00 a.m. –  
11:30 a.m.

XVI. Report on the Legislative Committee and Committee on Professional Conduct.

A. Legislative Committee (**Joseph Rosenbaum, CPA, Chair**).

1. Report of the March 23, 2023 Legislative Committee Meeting.

## Agenda Item

2. Review and Consideration of Possible Positions on Legislation.
3. Update on Legislative Proposals for the California Board of Accountancy.
4. Review and Possible Consideration of Positions on Legislation the California Board of Accountancy is Monitoring.
  - a. Assembly Bill 469 – California Public Records Act Ombudsperson.
  - b. Assembly Bill 477 – Legislative Review of State Boards.
  - c. Assembly Bill 820 – State Boards and Commissions: Seniors.
  - d. Assembly Bill 913 – Professions and Vocations.
  - e. Assembly Bill 916 – Administrative Procedure Act: Office of Administrative Law: Director.
  - f. Assembly Bill 996 – Department of Consumer Affairs: Continuing Education: Conflict-of-Interest Policy.
  - g. Assembly Bill 1070 – Department of Consumer Affairs: Vacancies.
  - h. Assembly Bill 1101 – Department of Consumer Affairs.
  - i. Senate Bill 24 – Department of Consumer Affairs.
  - j. Senate Bill 247 – Department of Consumer Affairs.
  - k. Senate Bill 259 – Reports Submitted to Legislative Committees.
  - l. Senate Bill 279 – Administrative Regulations: Public Participation.
  - m. Senate Bill 358 – Professional Licenses: Military Service.
  - n. Senate Bill 372 – Department of Consumer Affairs: Licensee and Registrant Records: Name and Gender Changes.
  - o. Senate Bill 510 – State Government: Mailed Notice.
  - p. Senate Bill 702 – Gubernatorial Appointments.
  - q. Senate Bill 764 – Department of Consumer Affairs: Regulatory Boards: Removal of Board Members.
  - r. Senate Bill 770 – State boards and Commissions.
  - s. Senate Bill 802 – Licensing Boards: Disqualification from Licensure: Criminal Conviction.
  - t. Senate Bill 812 – Tax Preparers: Notices: Social Media Accounts.
  - u. Senate Bill 816 – Interior Designers.
  - v. Senate Bill 820 – Consumer Complaints.

## **Agenda Item**

### **B. Committee on Professional Conduct (Kristian Latta, CPA, Chair).**

1. Report of the March 23, 2023 Committee on Professional Conduct Meeting.
2. Discussion and Possible Action to Consider Changes to Previously Proposed Text and Reauthorization of a Regular Rulemaking to Amend California Code of Regulations, Title 16, Section 41 – Firm Responsibilities and Section 50.1 – Client Notification, Regarding Accounting Firms Providing Attest Services With Ownership Comprised Solely of Certified Public Accountants Who Have Not Completed the Attest Experience Requirement.
3. Discussion and Possible Action on the National Association of State Boards of Accountancy's Revised Proposed Amendments to the *Uniform Accountancy Act Model Rules*.

### **11:30 a.m. – XVII. Closing Business (Katrina L. Salazar, CPA, President). 11:40 a.m.**

#### **A. Agenda Items for Future California Board of Accountancy Meetings.**

Adjournment.

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