



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



OFFICIAL NOTICE AND MEETING AGENDA OF THE CALIFORNIA BOARD OF ACCOUNTANCY

**California Board of Accountancy Meeting
Petition Hearings and Closed Session
Thursday, July 22, 2021, beginning at 9:00 a.m.**

**Committee on Professional Conduct Meeting
Friday, July 23, 2021, beginning at 9:00 a.m.**

**Legislative Committee Meeting
Friday, July 23, 2021, beginning at 10:10 a.m.**

**Enforcement Program Oversight Committee Meeting
Friday, July 23, 2021, beginning at 11:25 a.m.**

**California Board of Accountancy Meeting – Public Session
Friday, July 23, 2021, beginning at 1:30 p.m.**

The California Board of Accountancy will hold a public meeting via a teleconference platform. Pursuant to the provisions of Governor Gavin Newsom's Executive Order [N-08-21](#), dated June 11, 2021 a physical meeting location is not being provided.

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.

INSTRUCTIONS FOR PARTICIPATION:

For all those who wish to participate or observe the meetings on Thursday, July 22, 2021 please log on to this website: <https://dca-meetings.webex.com/dca-meetings/j.php?MTID=mc842be785a625dfd0b07ed248b77872>

For all those who wish to participate or observe the meeting on Friday, July 23, 2021 please log on to this website: <https://dca-meetings.webex.com/dca-meetings/j.php?MTID=m498102c5098905dab00c9a74509eb1d9>

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

CBA Meeting July 22-23, 2021

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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, 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 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, 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
COMMITTEE ON PROFESSIONAL CONDUCT**

TELECONFERENCE MEETING AGENDA

**Friday, July 23, 2021
9:00 a.m.**

Important Notice to the Public

All times indicated, other than those identified as “time certain,” are approximate and subject to change. **Action may be taken on any item on the agenda.** Agenda items may be discussed and action taken out of order at the discretion of the Committee on Professional Conduct Chair for convenience, to accommodate speakers, or to maintain a quorum. Identified presenters are subject to change. The meeting may be canceled without notice. For verification of the meeting, call (916) 263-3680 or access the California Board of Accountancy’s [website](#).

Call to Order, Roll Call, Establishment of Quorum, and Opening Remarks (Luz Molina Lopez, Chair).

<u>Agenda Item</u>	<u>CBA Item #</u>
I. Public Comments for Items not on the Agenda.*	
II. Approve Minutes of the May 13, 2021 Committee on Professional Conduct Meeting.	XIII.B.
III. Discussion and Possible Action Regarding the Elimination of the Second Signature Requirement from the Certificates of General and Attest Experience (Michelle Center, Chief, Licensing Division).	XV.A.2.
IV. 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 his or her 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, 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
 LEGISLATIVE COMMITTEE**

TELECONFERENCE MEETING AGENDA

**Friday, July 23, 2021
 10:10 a.m.**

Important Notice to the Public

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Call to Order, Roll Call, Establishment of Quorum, and Opening Remarks (Xochitl León, Committee Chair).

<u>Agenda Item</u>	<u>CBA Item #</u>
I. Public Comments for Items not on the Agenda.*	
II. Approve Minutes of the May 13, 2021 Legislative Committee Meeting.	XIII.C.
III. California Board of Accountancy 2021 Legislative Tracking Chart, Reference Document Regarding Possible Positions for Legislation, and the Legislative Calendar for 2021.	XV.B.2.

<u>Agenda Item</u>	<u>CBA Item #</u>
IV. Update, Discussion, and Possible Action on Legislation Which the California Board of Accountancy Has Taken a Position (Deanne Pearce, Assistant Executive Officer/Patrick Ibarra, Information and Planning Officer).	XV.B.3.
A. Assembly Bill 29 – State Bodies: Meetings.	XV.B.3.a.
B. Assembly Bill 107 – Licensure: Veterans and Military Spouses.	XV.B.3.b.
C. Assembly Bill 298 – Accountancy: California Board of Accountancy.	XV.B.3.c.
D. Assembly Bill 646 – Department of Consumer Affairs: Boards: Expunged Convictions.	XV.B.3.d.
E. Assembly Bill 885 – Bagley-Keene Open Meeting Act: Teleconferencing.	XV.B.3.e.
F. Assembly Bill 1026 – Business Licenses: Veterans.	XV.B.3.f.
G. Assembly Bill 1316 – School Accountability: Financial and Performance Audits: Charter Schools: Contracts.	XV.B.3.g.
H. Assembly Bill 1386 – License Fees: Military Partners and Spouses.	XV.B.3.h.
I. Senate Bill 607 – Professions and Vocations.	XV.B.3.i.
J. Senate Bill 772 – Professions and Vocations: Citations: Minor Violations.	XV.B.3.j.
V. Review and Consideration of Possible Positions on Legislation (Deanne Pearce, Assistant Executive Officer/Patrick Ibarra, Information and Planning Officer).	XV.B.4.

<u>Agenda Item</u>	<u>CBA Item #</u>
A. Assembly Bill 105 – The Upward Mobility Act of 2021: Boards and Commissions: Civil Service: Examinations: Classifications.	XV.B.4.a.
B. Senate Bill 702 – Gubernatorial Appointments: Report.	XV.B.4.b.
C. Senate Bill 731 – Criminal Records: Relief.	XV.B.4.c.
VI. Review and Possible Consideration of Positions on Legislation the California Board of Accountancy is Monitoring (Patrick Ibarra, Information and Planning Officer).	XV.B.5.
A. Assembly Bill 2 – Regulations: Legislative Review: Regulatory Reform.	XV.B.5.a.
B. Assembly Bill 69 – State of Emergency: Termination After 60 days: Extension by the Legislature.	XV.B.5.b.
C. Assembly Bill 225 – Department of Consumer Affairs: Boards: Veterans: Military Spouses: Licenses.	XV.B.5.c.
D. Assembly Bill 305 – Veteran Services: Notice.	XV.B.5.d.
E. Assembly Bill 339 – Local Government: Open and Public Meetings.	XV.B.5.e.
F. Assembly Bill 343 – California Public Records Act Ombudsperson.	XV.B.5.f.
G. Assembly Bill 473 – California Public Records Act.	XV.B.5.g.
H. Assembly Bill 587 – Social Media Companies: Terms of Service.	XV.B.5.h.
I. Assembly Bill 703 – Open Meetings: Local Agencies: Teleconferences.	XV.B.5.i.

<u>Agenda Item</u>	<u>CBA Item #</u>
J. Assembly Bill 1273 – Interagency Advisory Committee on Apprenticeship: the Director of Consumer Affairs and the State Public Health Officer.	XV.B.5.j.
K. Assembly Bill 1291 – State Bodies: Open Meetings.	XV.B.5.k.
L. Senate Bill 209 – State of Emergency: Termination After 45 Days: Extension by the Legislature.	XV.B.5.l.
M. Senate Bill 452 – State Government: Immigrant and Refugee Affairs Agency: Office of Immigrant and Refugee Affairs.	XIV.B.5.m.
N. Senate Bill 593 – School Accountability: Independent Study, Educational Enrichment Activities, Oversight, and Audit Requirements.	XV.B.5.n.
VII. Agenda Items for Next Meeting.	XV.B.6.
Adjournment.	

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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.

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**CALIFORNIA BOARD OF ACCOUNTANCY
 ENFORCEMENT PROGRAM OVERSIGHT COMMITTEE**

TELECONFERENCE MEETING AGENDA

**Friday, July 23, 2021
 11:25 a.m.**

Important Notice to the Public

All times indicated, other than those identified as “time certain,” are approximate and subject to change. **Action may be taken on any item on the agenda.** Agenda items may be discussed and action taken out of order at the discretion of the Enforcement Program Oversight Committee Chair for convenience, to accommodate speakers, or to maintain a quorum. Identified presenters are subject to change. The meeting may be canceled without notice. For verification of the meeting, call (916) 263-3680 or access the California Board of Accountancy’s [website](#).

Call to Order, Roll Call, Establishment of Quorum, and Opening Remarks (Karriann Farrell Hinds, Esq., Chair).

<u>Agenda Item</u>	<u>CBA Item #</u>
I. Public Comments for Items not on the Agenda.	
II. Approve Minutes of the May 13, 2021 Enforcement Program Oversight Committee Meeting.	XIII.D.
III. Discussion and Possible Action Regarding the Use of the American Institute of Certified Public Accountant’s .CPA Domain (Dominic Franzella, Chief, Enforcement Division).	XV.C.2.
IV. Agenda Items for Next Meeting.	
Adjournment.	

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California Board of Accountancy members who are not members of the Enforcement Program Oversight Committee may be attending the meeting. However, if a majority of members of the full board are present at the Enforcement Program Oversight Committee meeting, members who are not Enforcement Program Oversight 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, or send a written request to the California Board of Accountancy Office 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**

TELECONFERENCE MEETING AGENDA

**Thursday, July 22, 2021
 9:00 a.m. – 5:00 p.m.**

**Friday, July 23, 2021
 1:30 p.m. – 5:00 p.m.**

Important Notice to the Public

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Thursday,
 July 22, 2021

Call to Order, Roll Call, Establishment of Quorum, and Opening Remarks (Nancy J. Corrigan, CPA, President).

Agenda Item.

**9:00 a.m. –
 12:30 p.m.**

- I. Petition Hearings.
 - A. Kevin Gram Breard, CPA 41061/Breard & Associates, Inc. Certified Public Accountants, COR 3059 – Petition for Termination of Probation and Reduction of Penalty.

Morning Break

Agenda Item.

B. Steven Krell, CPA 34692 – Petition for Reinstatement of Revoked Certificate.

12:30 p.m. –
1:30 p.m.

Lunch

1:30 p.m. –
3:00 p.m.

C. Daniel Robles, CPA 125631 – Petition for Reduction of Penalty.

II. 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.

3:00 p.m. –
3:15 p.m.

Afternoon Break

3:15 p.m. –
5:00 p.m.

III. 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. *Sam Walker and Sam Walker CPA, Inc. v. Department of Consumer Affairs, California Board of Accountancy, and the Office of Administrative Hearings*, Los Angeles County Superior Court, Case No. BS171533.

B. *Lanfeng Zhao and ELZ Accountancy Corporation v. California Board of Accountancy*, Los Angeles Superior Court, Case No. 18STCP02951.

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

IV. 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.

Recess Until July 23, 2021.

Friday,
July 23, 2021

Call to Order, Roll Call, and Establishment of a Quorum
(Nancy J. Corrigan, CPA, President).

1:30 p.m. –
1:40 p.m.

V. Public Comments for Items not on the Agenda.

Agenda Item.

- 1:40 p.m. –
2:00 p.m.
- VI. Report of the President (**Nancy J. Corrigan, CPA, President**).
- A. Resolution for Retired Peer Review Oversight Committee Member, Kevin W. Harper, CPA.
- B. Discussion and Possible Action on the CPA Evolution Survey Regarding Draft Core and Discipline Content (**Michelle Center, Chief, Licensing Division**).
- C. Department of Consumer Affairs Director's Report on Departmental Activities (**Department of Consumer Affairs Representative, Office of Board and Bureau Services**).
- 2:00 p.m. –
2:10 p.m.
- VII. Report of the Vice-President (**Michael M. Savoy, CPA, 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.
- 2:10 p.m. –
2:25 p.m.
- VIII. Report of the Secretary/Treasurer (**Mark J. Silverman, Esq., Secretary/Treasurer**).
- A. Discussion of the Fiscal Year 2020-21 Fiscal Month 10 Financial Report.
- 2:25 p.m. –
2:50 p.m.
- IX. Report of the Executive Officer (**Patti Bowers, Executive Officer**).
- A. Overview of the Features Consumers Can Use to Obtain Information on Licensees (**Deanne Pearce, Assistant Executive Officer**).
- B. Update on the California Board of Accountancy's Communications and Outreach (**Patrick Ibarra, Information and Planning Officer**).
- 2:50 p.m. –
3:05 p.m.
- Afternoon Break
- 3:05 p.m. –
3:15 p.m.
- X. Report on the Enforcement Advisory Committee, Qualifications Committee, and Peer Review Oversight Committee.

Agenda Item.

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

1. Report of the July 8, 2021 Enforcement Advisory Committee Meeting.
2. Approval of the 2022 Enforcement Advisory Committee Meeting Dates.

B. Qualifications Committee (**Nasi Raissian, CPA, Chair**).

There is no report on this agenda item.

C. Peer Review Oversight Committee (**Renee Graves, CPA, Chair**).

There is no report on this agenda item.

3:15 p.m. –
3:35 p.m.

XI. Report of the Enforcement Chief (**Dominic Franzella, Chief, Enforcement Division**).

A. Enforcement Activity Report.

3:35 p.m. –
3:55 p.m.

XII. Report of the Licensing Chief (**Michelle Center, Chief, Licensing Division**).

A. Licensing Activity Report (**Suzanne Gracia, Manager, Examination Unit**).

3:55 p.m. –
4:00 p.m.

XIII. Meeting Minutes (**Nancy J. Corrigan, CPA, President**).

A. Adoption of the Minutes of the May 13-14, 2021 California Board of Accountancy Meeting.

B. Acceptance of the Minutes of the May 13, 2021 Committee on Professional Conduct Meeting.

C. Acceptance of the Minutes of the May 13, 2021 Legislative Committee Meeting.

D. Acceptance of the Minutes of the May 13, 2021 Enforcement Program Oversight Committee Meeting.

E. Acceptance of the Minutes of the May 6, 2021 Enforcement Advisory Committee Meeting.

Agenda Item.

4:00 p.m. –
4:15 p.m.

XIV. Other Business.

A. American Institute of Certified Public Accountants.

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

a. 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 Pacific Regional Director (**Katrina L. Salazar, CPA**).

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

a. Continuing Professional Education Committee (**Nancy J. Corrigan, CPA, President**).

b. Relations With Member Boards Committee (**Katrina L. Salazar, CPA, Chair**).

c. Strategic Planning Task Force (**Patti Bowers, Executive Officer**).

d. Report of the June 22-23, 2021 Regional Meeting (**Nancy J. Corrigan, CPA, President/Katrina L. Salazar, CPA**).

4:15 p.m. –
4:55 p.m.

XV. Report on the Committee on Professional Conduct, Legislative Committee, and Enforcement Program Oversight Committee.

A. Committee on Professional Conduct (**Luz Molina Lopez, Committee Chair**).

1. Report of the July 23, 2021 Committee on Professional Conduct Meeting.

2. Discussion and Possible Action Regarding the Elimination of the Second Signature Requirement from the Certificates of General and Attest Experience.

Agenda Item.

B. Legislative Committee (Xochitl León, Committee Chair).

1. Report of the July 23, 2021 Legislative Committee Meeting.
2. California Board of Accountancy 2021 Legislative Tracking Chart, Reference Document Regarding Possible Positions for Legislation, and the Legislative Calendar for 2021.
3. Update, Discussion, and Possible Action on Legislation Which the California Board of Accountancy Has Taken a Position.
 - a. Assembly Bill 29 – State Bodies: Meetings.
 - b. Assembly Bill 107 – Licensure: Veterans and Military Spouses.
 - c. Assembly Bill 298 – Accountancy: California Board of Accountancy.
 - d. Assembly Bill 646 – Department of Consumer Affairs: Boards: Expunged Convictions.
 - e. Assembly Bill 885 – Bagley-Keene Open Meeting Act: Teleconferencing.
 - f. Assembly Bill 1026 – Business Licenses: Veterans.
 - g. Assembly Bill 1316 – School Accountability: Financial and Performance Audits: Charter Schools: Contracts.
 - h. Assembly Bill 1386 – License Fees: Military Partners and Spouses.
 - i. Senate Bill 607 – Professions and Vocations.
 - j. Senate Bill 772 – Professions and Vocations: Citations: Minor Violations.
4. Review and Consideration of Possible Positions on Legislation.
 - a. Assembly Bill 105 – The Upward Mobility Act of 2021: Boards and Commissions: Civil Service: Examinations: Classifications.
 - b. Senate Bill 702 – Gubernatorial Appointments: Report.

Agenda Item.

- c. Senate Bill 731 – Criminal Records: Relief.
- 5. Review and Possible Consideration of Positions on Legislation the California Board of Accountancy is Monitoring.
 - a. Assembly Bill 2 – Regulations: Legislative Review: Regulatory Reform.
 - b. Assembly Bill 69 – State of Emergency: Termination After 60 Days: Extension by the Legislature.
 - c. Assembly Bill 225 – Department of Consumer Affairs: Boards: Veterans: Military Spouses: Licenses.
 - d. Assembly Bill 305 – Veteran Services: Notice.
 - e. Assembly Bill 339 – Local Government: Open and Public Meetings.
 - f. Assembly Bill 343 – California Public Records Act Ombudsperson.
 - g. Assembly Bill 473 – California Public Records Act.
 - h. Assembly Bill 587 – Social Media Companies: Terms of Service.
 - i. Assembly Bill 703 – Open Meetings: Local Agencies: Teleconferences.
 - j. Assembly Bill 1273 – Interagency Advisory Committee on Apprenticeship: the Director of Consumer Affairs and the State Public Health Officer.
 - k. Assembly Bill 1291 – State Bodies: Open Meetings.
 - l. Senate Bill 209 – State of Emergency: Termination After 45 Days: Extension by the Legislature.
 - m. Senate Bill 452 – State Government: Immigrant and Refugee Affairs Agency: Office of Immigrant and Refugee Affairs.

Agenda Item.

- n. Senate Bill 593 – School Accountability: Independent Study, Educational Enrichment Activities, Oversight, and Audit Requirements.

C. Enforcement Program Oversight Committee
(Karriann Farrell Hinds, Esq., Committee Chair)

- 1. Report of the July 23, 2021 Enforcement Program Oversight Committee Meeting.
- 2. Discussion and Possible Action Regarding the Use of the American Institute of Certified Public Accountant's .CPA Domain.

4:55 p.m. – 5:00 p.m. XVI. Closing Business **(Nancy J. Corrigan, CPA, President)**.

- A. Agenda Items for Future California Board of Accountancy Meetings.

Adjournment.

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