

IOWA ACCOUNTANCY EXAMINING BOARD  
200 East Grand Ave, Suite 350 | Des Moines, IA 50309

Open Session Minutes  
Board Meeting  
July 28, 2022  
10:00 a.m.

**Board members present for all or part of the meeting:**

James Smith	Jennifer Dickey – via Zoom
Bradley Hauge – via Zoom	Allen Kockler
Jessica Richter – via Zoom	Lesley Bartholomew – via Zoom

**Board members absent:**

Michelle O’Neill

**Staff Present:**

Robert Lampe, Executive Officer	Kimberly Gleason, Administrative Assistant
Brad Horn, AAG	Renee Paulsen, PLB Staff
Lori SchraderBachar, Bureau Chief	Demetria Witt, Licensing Specialist

**Public Present:**

Cindy Adams, ISCPA

**Call to Order:**

Kockler called the meeting to order at 10:01 a.m.  
Roll call was taken and quorum was established.  
No corrections or changes made to the agenda.

**Motion by Smith to approve open and closed session minutes from May 26, 2022, as presented.**

Seconded by Bartholomew.

VOTE: Aye: All      Nay: None      Abstaining: None

Motion passed unanimously.

**Chair’s Comments**

Kockler reported that discipline meet prior to meeting and it went well.

**Bureau Chief Comments**

SchraderBachar welcomed new PLB staff member, Demetria Witt and advised of staffing changes. SchraderBachar stated she contacted the Governor’s office regarding the board vacancy.

**Executive Officer Comments**

Lampe reported on renewals and reminded board members to submit their per diems.

**Assistant Attorney General Comments**

Horn advised that a rule change will need to be made.

**New Business**

Discussion NASBA Ireland MRA

Lampe announced that NASBA has an MRA with Ireland which will require a rule change.

Discussion and Vote, NASBA CPA Transition Recommendation

Lampe stated that the new CPA exams will launch January 2024 and board went into short discussion.

**Motion by Smith to allow any candidate with Uniform CPA Examination credit(s) on January 1, 2024, will have such credit(s) extended to June 30, 2025.**

Seconded by Hauge.

VOTE: Aye: All      Nay: None      Abstaining: None

Motion passed unanimously.

NASBA Regional Meeting Report – Smith

Smith provided a copy of his meeting summary and board inquired on some of the bullet points.

Vote on Attendees including authority to vote, NASBA Annual Meeting, San Diego.

**Motion by Richter to approve Lampe and Smith to attend the NASBA Annual Meeting in San Diego with the authority to vote on behalf of Iowa.**

Seconded by Hauge.

VOTE: Aye: All      Nay: None      Abstaining: None

Motion passed unanimously.

Vote on NASBA Committee Member Travel, FY23

**Motion by Bartholomew to approve NASBA Committee Member Travel, FY23.**

Seconded by Hauge.

VOTE: Aye: All      Nay: None      Abstaining: None

Motion passed unanimously.

#### **Public Comment**

Adams thanked the board and spoke briefly.

Adams left the meeting at 10:43 a.m.

Kockler called for break at 10:44 a.m.

#### **Discipline Committee Report and Recommendations:**

**Motion made by Kockler to go into Closed Session: In accordance with Iowa Code §§ 21.5(1)(a) & (d) and 272C.6(4), the Board will go into closed session to review pending licensee discipline cases and investigations, including any cases ready for final resolution through closure or consent order.**

Seconded by Smith.

Roll Call Vote: Bartholomew, aye; Dickey, aye; Hauge, aye; Kockler, aye; Richter, aye; and Smith, aye.

The Board entered into closed session at 10:49 a.m. and arose at 11:12 a.m.

**Motion by Bartholomew to return to open session.**

Seconded by Hauge.

VOTE: Aye: All      Nay: None      Abstaining: None

Motion passed unanimously.

**Motion by Dickey to close cases 21-07, 21-15, 21-16, 21-17, and 21-19 as discussed in closed sessions.**

Seconded by Smith.

VOTE: Aye: All      Nay: None      Abstaining: None

Motion passed unanimously.

**Motion by Bartholomew to accept, countersign the consent order, and close case 22-06 as discussed in closed session.**

Seconded by Hauge.

VOTE: Aye: All      Nay: None      Abstaining: None

Motion passed unanimously.

**Motion by Dickey to accept and countersign the consent order in cases 22-08 and 22-09 as discussed in closed session.**

Seconded by Hauge.

VOTE: Aye: All      Nay: None      Abstaining: None

Motion passed unanimously.

**Motion by Bartholomew to accept and countersign the consent order in cases 22-10 as discussed in closed session.**

Seconded by Dickey.

VOTE: Aye: Smith, Kockler, Hauge, Dickey, and Bartholomew      Nay: None      Abstaining: Richter

Motion passed.

**Adjourn**

Kockler adjourned the meeting at 11:15 a.m.

These minutes accurately reflect the minutes approved by the Board at the meeting on:

9/22/2022  
DATE

Robert E. Lampe on behalf of Chair  
BY: Chair

