

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

**Open Session Minutes**  
**Board Meeting**  
**September 22, 2022**  
**10:00 a.m.**

Pursuant to Iowa Code 21.8, this meeting was conducted by electronic means due to the health and safety concerns stemming from the COVID-19 virus, which had rendered an in-person meeting impossible or impractical.

Public access to this meeting was available online.

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

Lesley Bartholomew – via Zoom  
Bradley Hauge – via Zoom  
Allen Kockler – via Zoom

Michelle O’Neill – via Zoom  
Jessica Richter – via Zoom  
James Smith – via Zoom

**Board members absent:**

Jennifer Dickey

**Staff Present:**

Brad Horn, AAG – via Zoom  
Robert Lampe, Executive Officer – via Zoom  
Lori SchraderBachar, Bureau Chief – via Zoom

Ashley Thompson, PLB Investigator – via Zoom  
Demetria Witt, Licensing Specialist – via Zoom

**Public Present:**

Cindy Adams – ISCPA – via Zoom

Dawn Latham - ISCPA – via Zoom

**Call to Order:**

O’Neill 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 Hauge to approve open and closed session minutes from July 28, 2022, as presented.**

Seconded by Richter.

VOTE: Aye: All      Nay: None      Abstaining: None

Motion passed unanimously.

**Chair’s Comments**

O’Neill stated she will be meeting with ISCPA on September 23, 2022, about board process and progress.

**Bureau Chief Comments**

SchraderBachar congratulated Cindy Adams on her retirement and also thanked her for her service.

**Executive Officer Comments**

Lampe advised board of inclusive communication and discussion document form Iowa DD Council.

**Assistant Attorney General Comments**

Horn stated received feed back from the AAG office about draft changes for rules. AAG stated each board will need to make changes instead of PLB itself.

### **New Business**

Discussion NASBA Annual Meeting Votes Authorize Smith to Vote  
Smith and Lampe will attend meeting October 30, 2022, through November 2, 2022.

Bartholomew joined the meeting at 10:06 a.m.

### **Motion by O'Neill to allow Smith to vote at the NASABA Annual Meeting on behalf of the board.**

Seconded by Hauge.

VOTE: Aye: All      Nay: None      Abstaining: None

Motion passed unanimously.

### **Public Comment**

Adams thanked the board and spoke briefly and asked if could have boards draft rules once completed.

Latham advised the board of being the new CEO of ISCPA and thanked board. Latham also advised board that her and Adams visited the University of Iowa, Drake, and Iowa State. They spoke with accounting students about their opportunities with being a CPA in Iowa.

Adams left the meeting at 10:14 a.m.

Latham left the meeting at 10:15 a.m.

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

**Motion made by O'Neill 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 Bartholomew.

Roll Call Vote: Bartholomew, aye; Hauge, aye; Kockler, aye; O'Neill, aye; Richter, aye; and Smith, aye.

The Board entered into closed session at 10:16 a.m. and arose at 10:25 a.m.

### **Motion by Richter to return to open session.**

Seconded by Hauge.

VOTE: Aye: All      Nay: None      Abstaining: None

Motion passed unanimously.

### **Motion by Smith to close cases 22-08, 22-10, and 22-13 as discussed in closed sessions.**

Seconded by O'Neill.

VOTE: Aye: All      Nay: None      Abstaining: None

Motion passed unanimously.

### **Motion by Smith to find probable cause in cases 22-14 and 22-15 as discussed in closed session.**

Seconded by Bartholomew.

VOTE: Aye: All      Nay: None      Abstaining: None

Motion passed unanimously.

### **Adjourn**

O'Neill adjourned the meeting at 10:29 a.m.

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

12-8-2022  
DATE

Michelle O'Neill  
BY: Chair