

**Alabama State Board of Public Accountancy**  
**Minutes of Board Meeting**  
**September 26, 2022**

1. Date, Place and Attendance of Meeting:

A regular meeting of the Alabama State Board of Public Accountancy was held on Monday, September 26, 2022, at Auburn University located in Auburn, Alabama at 10:00 a.m.

Board Members Present: Ms. Connie Sheppard-Harris, CPA  
Mr. J. Earl Blackmon, CPA  
Dr. Steve Grice, CPA  
Mr. Michael Kintz, CPA  
Mr. Delbert Madison  
Ms. Rita Prince, CPA  
Mr. Wim Schaffers, CPA

No Board Members were absent.

A lawful quorum of the Board was present for the meeting.

Also present were D. Boyd Busby, Executive Director; Billington M. Garrett, General Counsel; Amy Thompson, Chief of Staff; Teresa Taylor, Enforcement Coordinator; Alise Ellis, Exam Coordinator; Nicole Robinson, CPE Administrator; Kathy Brown, Administrative Law Judge; and Jeannine Birmingham, President and CEO of the ASCPA. Additionally, Joshua Reidinger and Dana Schmidt were in attendance for the hearing portion of the meeting.

Sufficient prior notice of the meeting had been given as required by the Alabama Open Meetings Act.

2. Call to Order:

The meeting was called to order by Ms. Connie Sheppard-Harris, CPA, Chair.

3. Approval of Agenda:

Mr. Schaffers made a motion to approve the agenda as presented for the September 26, 2022 meeting. Mr. Blackmon seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris.

4. Election of Officers:

Ms. Sheppard-Harris made a motion to approve the new officers to be effective October 1, 2022. The new Chair will be Mr. Wim Schaffers, Vice Chair will be Mr. Michael Kintz, and the Secretary will be Mr. Delbert Madison. Dr. Grice seconded and the motion carried on a roll call vote. Voting

in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris.

5. Approval of Minutes:

Dr. Grice made a motion to approve the minutes of the July 15, 2022 meeting. Mr. Blackmon seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris.

6. Disciplinary Hearings:

a. Case No. 22CPE-1 – Jennifer Precise, Cert. 12132:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Jennifer Precise. Ms. Precise did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Mr. Schaffers made a motion that the Board accept the consent agreement as presented. Mr. Madison seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

b. Case No. 22CPE-2 – Jonathan Shane Sherbert, Cert. 11315:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. Jonathan Shane Sherbert. Mr. Sherbert did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Dr. Grice made a motion that the Board find Mr. Sherbert guilty of all charges made in the summons and compliant, that Mr. Sherbert's certificate be censured, and that Mr. Sherbert be fined \$2,050. Dr. Grice further moved that Mr. Sherbert resolve the CPE deficiency and complete the NASBA CPT Ethics course. Mr. Blackmon seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

c. Case No. 22CPE-3 – Robert Bryan Thompson, Cert. 4000:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. Robert Bryan Thompson. Mr. Thompson did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Mr. Schaffers made a motion that the Board accept the consent agreement as presented. Dr. Grice seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

d. Case No. 22CPE-4 – Ronald David Bailey, Cert. 6126:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. Ronald David Bailey. Mr. Bailey did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Mr. Madison made a motion that the Board accept the consent agreement as presented. Dr. Grice seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

e. Case No. 22CPE-5 – Kathryn Martha Baker, Cert. 12186:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Kathryn Martha Baker. Ms. Baker did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Ms. Prince made a motion that the Board accept the consent agreement as presented. Dr. Grice seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

f. Case No. 22CPE-6 – Kim K. Bice, Cert. 6375:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Kim K. Bice. Ms. Bice did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Mr. Madison made a motion that the Board accept the consent agreement as presented. Dr. Grice seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

g. Case. No 22CPE-7 – Diana Marie Boykin, Cert. 11582:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Diana Marie Boykin. Ms. Boykin did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Mr. Schaffers made a motion that the Board accept the consent agreement as presented. Mr. Kintz seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.



h. Case. No 22CPE-9 – Lauren Rebekah Bryan, Cert. 12602:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Lauren Rebekah Bryan. Ms. Bryan did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Ms. Prince made a motion that the Board accept the consent agreement as presented. Mr. Madison seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

i. Case. No 22CPE-10 – Manda L. Bryan, Cert. 12539:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Manda L. Bryan. Ms. Bryan did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Dr. Grice made a motion that the Board accept the consent agreement as presented. Mr. Madison seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

j. Case. No 22CPE-11 – Jon Mark Campbell, Jr., Cert. 12603:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. Jon Mark Campbell, Jr. Mr. Campbell did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Mr. Madison made a motion that the Board accept the consent agreement as presented. Dr. Grice seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

k. Case. No 22CPE-13 – David Travis Crockett, Cert. 10015:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. David Travis Crockett. Mr. Crockett did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Mr. Schaffers made a motion that the Board accept the consent agreement as presented. Mr. Kintz seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

l. Case. No 22CPE-14 – Elizabeth Coppejans Del Rio, Cert. 12283:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Elizabeth Coppejans Del Rio. Ms. Del Rio did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Dr. Grice made a motion that the Board accept the consent agreement as presented. Mr. Madison seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

m. Case. No 22CPE-16 – Adrienne C. Edmondson, Cert. 10605-R:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Adrienne C. Edmondson. Ms. Edmondson did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Mr. Madison made a motion that the Board accept the consent agreement as presented. Mr. Schaffers seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

n. Case. No 22CPE-17 – Patricia Davis Farr, Cert. 8039:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Patricia Davis Farr. Ms. Farr did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Dr. Grice made a motion that the Board accept the consent agreement as presented. Mr. Schaffers seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

o. Case. No 22CPE-18 – Keary Lee Foster, Cert. 8697-R:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. Keary Lee Foster. Mr. Foster did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Mr. Schaffers made a motion that the Board accept the consent agreement as presented. Mr. Kintz seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.



p. Case. No 22CPE-19 – Mary Lisa Fuentes, Cert. 9902:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Mary Lisa Fuentes. Ms. Fuentes did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Mr. Blackmon made a motion that the Board accept the consent agreement as presented. Mr. Madison seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

q. Case. No 22CPE-20 – Susan Jo Gatins, Cert. 6757:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Susan Jo Gatins. Ms. Gatins did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Mr. Blackmon made a motion that the Board accept the consent agreement as presented. Mr. Madison seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

r. Case. No 22CPE-32 – Joshua Layne Reidinger, Cert. 8922:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. Joshua Layne Reidinger. Mr. Reidinger attended the meeting and represented himself. At the conclusion of the hearing, Mr. Madison made a motion to go into Executive Session to deliberate evidence in a public hearing. Mr. Schaffers seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. Board members excused themselves at 11:45 a.m. and qualified Board members met in executive session to deliberate with an estimated time of 15 minutes needed to discuss the matter. After deliberation, at 12:04 p.m., Ms. Sheppard-Harris called the meeting back to order and called for a motion in the matter. Mr. Schaffers made a motion that the Board find Mr. Reidinger not guilty of the charges in the summons and complaint. Mr. Schaffers further moved that Mr. Reidinger be subject to audit for the next two years. Dr. Grice seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Orders, Summons and Complaints, and the transcript of the hearing are attached and become a part of these minutes.

s. Case. No 22CPE-22 – Kaye Howell Huff, Cert. 6432:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Kaye Howell Huff. Ms. Huff did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Dr. Grice made a motion that the Board accept the consent agreement as presented. Mr. Schaffers seconded and the

motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

t. Case. No 22CPE-23 – Robert Scott Jackson, Cert. 12542:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. Robert Scott Jackson. Mr. Jackson did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Mr. Schaffers made a motion that the Board accept the consent agreement as presented. Mr. Madison seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

u. Case. No 22CPE-24 – Raddy Samir Jarrar, Cert. 11039:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. Raddy Samir Jarrar. Mr. Jarrar did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Mr. Blackmon made a motion that the Board accept the consent agreement as presented. Mr. Kintz seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

v. Case. No 22CPE-25 – Michael L. Lloyd, Cert. 5724:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. Michael L. Lloyd. Mr. Lloyd did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Dr. Grice made a motion that the Board accept the consent agreement as presented. Mr. Kintz seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

w. Case. No 22CPE-26 – James L. Lowery, Jr., Cert. 3224:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. James L. Lowery, Jr. Mr. Lowery did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Mr. Schaffers made a motion that the Board accept the consent agreement as presented. Mr. Madison seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order,



Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

x. Case. No 22CPE-28 – Edwynna W. Minor, Cert. 1873:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Edwynna W. Minor. Ms. Minor did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Mr. Madison made a motion that the Board accept the consent agreement as presented. Mr. Schaffers seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

y. Case No. 22CPE-29 – Karen C. O'Bannon, Cert. 4254:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Karen C. O'Bannon. Ms. O'Bannon did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Dr. Grice made a motion that the Board find Ms. O'Bannon guilty of all charges made in the summons and compliant, and that Ms. O'Bannon be fined \$700. Dr. Grice further moved that Ms. O'Bannon resolve the CPE deficiency and complete the NASBA CPT Ethics course. Mr. Madison seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

z. Case No. 22CPE-30 – Willis D. Ratliff, Cert. 3294-R:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. Willis D. Ratliff. Mr. Ratliff did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Mr. Schaffers made a motion to go into Executive Session to deliberate evidence in a public hearing. Dr. Grice seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. Board members excused themselves at 1:29 p.m. and qualified Board members met in executive session to deliberate with an estimated time of 5 minutes needed to discuss the matter. After deliberation, at 1:36 p.m., Ms. Sheppard-Harris called the meeting back to order and called for a motion in the matter. Mr. Schaffers a motion that the Board find Mr. Ratliff guilty of all charges made in the summons and compliant, that Mr. Ratliff's certificate be suspended, and that Mr. Ratliff be fined \$4,500. Mr. Schaffers further moved that Mr. Ratliff's certificate be suspended until satisfactory resolution of the CPE deficiency and completion of the NASBA CPT Ethics course. Additionally, Mr. Schaffers moved that Mr. Ratliff appear before the Board at its January Board meeting. Mr. Blackmon seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and



Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

aa. Case No. 22CPE-31 – Jason Robin Redd, Cert. 8651:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. Jason Robin Redd. Mr. Redd did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Dr. Grice made a motion that the Board accept the consent agreement as presented. Mr. Madison seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

bb. Case No. 22CPE-33 – Joy Kaynelle Richardson, Cert. 7056:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Joy Kaynelle Richardson. Ms. Richardson did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Dr. Grice made a motion that the Board accept the consent agreement as presented. Mr. Kintz seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

cc. Case No. 22CPE-34 – Reauchann Amor Richardson, Cert. 13030-R:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Reauchann Amor Richardson. Ms. Richardson did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Mr. Schaffers made a motion that the Board accept the consent agreement as presented. Mr. Madison seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

dd. Case No. 22CPE-36 – Mallory Victoria Romine, Cert. 13788-R:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Mallory Victoria Romine. Ms. Romine did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Ms. Prince made a motion that the Board accept the consent agreement as presented. Mr. Blackmon seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

ee. Case No. 22CPE-37 – Joshua Boone Stewart, Cert. 13375:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. Joshua Boone Stewart. Mr. Stewart did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Mr. Madison made a motion that the Board accept the consent agreement as presented. Mr. Kintz seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

ff. Case No. 22CPE-38 – Karmen Mothershed Still, Cert. 7474:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Karmen Mothershed Still. Ms. Still did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Mr. Madison made a motion that the Board accept the consent agreement as presented. Mr. Kintz seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

gg. Case No. 22CPE-39 – Lacey Stephens Suchocki, Cert. 12235:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Lacey Stephens Suchocki. Ms. Suchocki did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Dr. Grice made a motion that the Board accept the consent agreement as presented. Mr. Kintz seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

hh. Case No. 22CPE-40 – Sylvia Ann Walker, Cert. 8106:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Sylvia Ann Walker. Ms. Walker did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Mr. Schaffers made a motion that the Board accept the consent agreement as presented. Mr. Blackmon seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.



ii. Case No. 22CPE-41 – Elizabeth H. Walter, Cert. 8812:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Elizabeth H. Walter. Ms. Walter did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Dr. Grice made a motion that the Board accept the consent agreement as presented. Mr. Blackmon seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

jj. Case No. 22CPE-42 – Richard Lee Watts, Jr., Cert. 11647-R:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. Richard Lee Watts, Jr. Mr. Watts did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Mr. Madison made a motion that the Board accept the consent agreement as presented. Mr. Blackmon seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

kk. Case No. 22CPE-43 – Lindsey Stuardi Weems, Cert. 9506:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Ms. Lindsey Stuardi Weems. Ms. Weems did not attend the meeting and the hearing was conducted in her absence. At the conclusion of the hearing, Dr. Grice made a motion that the Board accept the consent agreement as presented. Mr. Madison seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

ll. Case No. 22CPE-44 – Bradley George Wolfe, Cert. 7099:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. Bradley George Wolfe. Mr. Wolfe did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Dr. Grice made a motion that the Board accept the consent agreement as presented. Mr. Madison seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

mm. Case No. 22CPE-50 – Randal Gene Vellocido, Cert. 13452-R:

Ms. Kathy Brown, Esq., Governmental Hearing Officer served as hearing officer and presided over the disciplinary hearings for Mr. Randal Gene Vellocido. Mr. Vellocido did not attend the meeting and the hearing was conducted in his absence. At the conclusion of the hearing, Dr. Grice made a motion to go into Executive Session to deliberate evidence in a public hearing. Mr. Schaffers seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. Board members excused themselves at 2:27 p.m. and qualified Board members met in executive session to deliberate with an estimated time of 5 minutes needed to discuss the matter. After deliberation, at 2:32 p.m., Ms. Sheppard-Harris called the meeting back to order and called for a motion in the matter. Dr. Grice made a motion that the Board find Mr. Vellocido guilty of all charges made in the summons and compliant, that Mr. Vellocido's certificate be suspended, and that Mr. Vellocido be fined \$1,500 per count for a total of \$4,500. Dr. Grice further moved that Mr. Vellocido's certificate be suspended until satisfactory resolution of the CPE deficiency and completion of the NASBA CPT Ethics course. Additionally, Dr. Grice moved that Mr. Vellocido appear before the Board at its January Board meeting. Mr. Schaffers seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris. The Board's Order, Summons and Complaint, and the transcript of the hearing are attached and become a part of these minutes.

7. Requests for Reinstatement:

a. Jerrold Casey Rodden, Certificate No. 13005-R:

Mr. Busby presented a letter from Jerrold Casey Rodden, CPA Certificate No. 13005-R, requesting reinstatement to active status. His reinstatement request included all the completed forms and fees that the Board had decided would be necessary to gain favorable consideration for reinstatement. Mr. Rodden did not attend the hearing and it was conducted in his absence. Mr. Rodden's written request included the required assertion on felonies, a completed 2022-2023 personal registration form, submission of catch-up CPE and payment in the amount of \$2,800. The payment comprised the \$100 reinstatement fee, \$2,000 administrative fine, \$500 late renewal penalty for the fiscal year 2018-2019, and \$200 registration fees for the fiscal years 2018-2019 and 2022-2023. After discussion, Mr. Madison made a motion to reinstate Mr. Rodden's CPA Certificate No. 13005-R to active status. Mr. Schaffers seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris.

b. Michael Wayne Shaper, Certificate No. 6798:

Mr. Busby presented a letter from Michael Wayne Shaper, CPA Certificate No. 6798, requesting reinstatement to active status. His reinstatement request included all the completed forms and fees that the Board had decided would be necessary to gain favorable consideration for reinstatement. Mr. Shaper did not attend the hearing and it was conducted in his absence. Mr. Shaper's written request included the required assertion on felonies, a completed 2021-2022 personal registration form, submission of catch-up CPE and payment in the amount of \$1,200.



The payment comprised the \$100 reinstatement fee, \$500 administrative fine, \$500 late renewal penalty for the fiscal year 2021-2022, and \$100 registration fee for the fiscal year 2021-2022. After discussion, Mr. Schaffers made a motion to reinstate Mr. Shaper's CPA Certificate No. 6798 to active status. Mr. Madison seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris.

c. Rachel Kristine Zucchelli, Certificate No. 12091:

Mr. Busby presented a letter from Rachel Kristine Zucchelli, CPA Certificate No. 12091, requesting reinstatement to inactive status. Her reinstatement request included all the completed forms and fees that the Board had decided would be necessary to gain favorable consideration for reinstatement. Ms. Zucchelli did not attend the hearing and it was conducted in her absence. Ms. Zucchelli's written request included the required assertion on felonies, a completed 2022-2023 personal registration form and payment in the amount of \$1,200. The payment comprised the \$100 reinstatement fee, \$500 administrative fine, \$500 late renewal penalty for the fiscal year 2021-2022, and \$100 registration fees for the fiscal years 2021-2022 and 2022-2023. After discussion, Dr. Grice made a motion to reinstate Ms. Zucchelli's CPA Certificate No. 12091 to inactive status. Mr. Madison seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris.

8. Public Hearing – Final Approval of Rule Changes:

Ms. Sheppard-Harris opened the meeting to a public hearing to discuss the final approval of rule changes

a. 30-X-4-.03 Military Spouses Reciprocity

Mr. Busby presented the final rule change to Section 30-X-4-.03 of the Board's Rules. There were no comments made regarding the proposed changes to the Board's Rules. Mr. Schaffers made a motion to adopt the final rule changes for Section 30-X-4-.03 of the Board's Rules. Mr. Blackmon seconded, and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris.

b. 30-X-4-.07 Military Spouse Waiver of Application Fee

Mr. Busby presented the final rule change to Section 30-X-4-.07 of the Board's Rules. There were no comments made regarding the proposed changes to the Board's Rules. Dr. Grice made a motion to adopt the final rule changes for Section 30-X-4-.07 of the Board's Rules. Mr. Blackmon seconded, and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Ms. Prince and Sheppard-Harris.

c. 30-X-6-.04 Client Records Rule Based on Firm Sale or Closing

Mr. Busby presented the final rule change to Section 30-X-6-.04 of the Board's Rules. There were three letters of comments presented regarding the proposed changes to the Board's Rules. Dr. Grice made a motion to adopt the final rule changes for Section 30-X-6-.04 of the Board's Rules with changes as presented to the Board. Mr. Kintz seconded, and the motion carried on a

roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris.

Ms. Sheppard-Harris ended the public hearing portion of the meeting.

9. Approval of April-May-June 2022 CPA Examination Grades:

The Board was presented with the AICPA Advisory Grades for the April through June 2022 Uniform CPA Examination. After review, Mr. Schaffers made a motion to approve the grades as released to candidates. Mr. Blackmon seconded and the motion carried unanimously.

10. Approval of new CPA Certificates from 14600 through 14644:

Dr. Grice made a motion to approve new CPA Certificates No. 14600 through 14644. Mr. Blackmon seconded and the motion carried unanimously.

11. Approval of CPA Exam Application Fee/Re-Application Fee Waiver:

Mr. Blackmon made a motion that the Board continue to waive all application fees for the CPA Exam, Reciprocal Certificates, and Transfer of Grades through December 31, 2023. Mr. Schaffers seconded and the motion carried on a roll call vote. Voting in favor of the motion were Messrs. Blackmon, Grice, Kintz, Madison, Schaffers, and Mses. Prince and Sheppard-Harris.

12. Approval of FY2022-2023 Operating Calendar:

The Board was presented with a 2022-2023 Operating Calendar. After review, Mr. Kintz made a motion to approve the 2022-2023 Operating Calendar as presented. Mr. Schaffers seconded and the motion carried unanimously.

13. Approval of FY2023-2024 Annual Budget:

Dr. Grice made a motion to approve the FY2023-2024 Annual Budget. Mr. Kintz seconded and the motion carried unanimously.

14. Approval of Compensation Plan:

Dr. Grice made a motion to approve the proposed Compensation Plan as presented. Mr. Schaffers seconded and the motion carried unanimously.

15. Alabama CPA Examination Statistics:

A statistical summary of the Alabama CPA Examination was presented to the Board. A brief discussion ensued but no action was taken.



16. Peer Review Delinquencies Update:

A statistical summary of Delinquent Peer Reviews as of December 31, 2021 was presented to the Board. A brief discussion ensued but no action was taken.

17. Complaints Update:

A complaints summary for FY 2009-2010 through 2021-2022 was presented to the Board. A brief discussion ensued but no action was taken.

18. Licensee Count:

A statistical summary of the number of Board licensees by category was presented to the Board. A brief discussion ensued but no action was taken.

19. Other Business:

Mr. Busby recognized Connie Sheppard-Harris's service to the Board as this was her last meeting.

20. Adjournment of Meeting:

The next meeting of the Board is scheduled for Tuesday, November 15, 2022 at 10:00 a.m. at the University of Alabama in Tuscaloosa. There being no further business to come before the Board, Ms. Prince made a motion to adjourn. Dr. Grice seconded and the motion carried unanimously. The meeting adjourned at 3:16 p.m.

Respectfully Submitted:



Delbert Madison  
Secretary

Approved:



Wim Schaffers, CPA  
Chair