



HYBRID (IN-PERSON/VIRTUAL)
ACCOUNTING EXAMINING BOARD
5133 Grainger Hall, UW Madison, 975 University Avenue, Madison
Contact: Will Johnson (608) 266-2112
September 9, 2026

The following agenda describes the issues that the Board plans to consider at the meeting. At the time of the meeting, items may be removed from the agenda. Please consult the meeting minutes for a record of the actions of the Board.

AGENDA

9:00 A.M.

OPEN SESSION – CALL TO ORDER – ROLL CALL

- A. Adoption of Agenda**
- B. Approval of Minutes of June 4, 2026**
- C. Reminders: Conflicts of Interest, Scheduling Concerns
- D. Introductions, Announcements and Recognition**
 - 1. Introduction and Welcome: DSPS Secretary Hereth
- E. Administrative Matters – Discussion and Consideration**
 - 1. Department, Staff and Board Updates
 - 2. Board Members – Term Expiration Dates
 - a. Barron, Thuy T. – 7/1/2029
 - b. Friedman, Michael E. – 7/1/2027
 - c. Misey, Robert – 7/1/2025
 - d. Phillips, Joan – 7/1/2027
 - e. Reinemann, John – 7/1/2029
 - f. Schlichting, David K. – 7/1/2026
 - g. Strautmann, Susan M. – 7/1/2028
- F. Administrative Rule Matters – Discussion and Consideration**
 - 1. Pending and Possible Rulemaking Projects
- G. Legislation and Policy Matters – Discussion and Consideration
- H. University of Wisconsin Accounting and Information Systems Program Update, Department Chair, Tom Linsmeier**
- I. Presentation – CPA Exam and Candidate Experience, Patricia Hartman, NASBA**

- J. Private Equity and Alternative Practice Structures in the Accounting Profession – Recommendation Memorandum - Discussion**
- K. National Association of State Boards of Accountancy (NASBA) Matters – Discussion and Consideration**
 - 1. Great Lakes Region Call Update – Thuy Barron
 - 2. Examination Administration Committee Update – Thuy Barron
 - 3. Legislative Support Committee Update – John Reinemann
 - 4. Awards Committee Update – Susan Strautmann
- L. Speaking Engagements, Travel or Public Relation Requests, and Reports**
 - 1. Travel Report: 2026 NASBA Eastern Regional Meeting – June 9-11, 2026 – Rio Grande, PR (Barron, Johnson, Strautmann)
 - 2. Travel Report: 2026 NASBA Western Regional Meeting – June 23-25, 2026 – Park City, UT (Reinemann)
- M. Wisconsin Institute of Certified Public Accountants (WICPA) Educators Committee – Discussion and Consideration**
- N. Discussion and Consideration of Items Added After Preparation of Agenda**
 - 1. Introductions, Announcements and Recognition
 - 2. Administrative Matters
 - 3. Election of Officers
 - 4. Appointment of Liaisons and Alternates
 - 5. Delegation of Authorities
 - 6. Education and Examination Matters
 - 7. Credentialing Matters
 - 8. Practice Matters
 - 9. Legislative and Policy Matters
 - 10. Administrative Rule Matters
 - 11. Liaison Reports
 - 12. Public Health Emergencies
 - 13. Board Liaison Training and Appointment of Mentors
 - 14. Informational Items
 - 15. Division of Legal Services and Compliance (DLSC) Matters
 - 16. Presentations of Petitions for Summary Suspension
 - 17. Petitions for Designation of Hearing Examiner
 - 18. Presentation of Stipulations, Final Decisions and Orders
 - 19. Presentation of Proposed Final Decisions and Orders
 - 20. Presentation of Interim Orders
 - 21. Petitions for Re-Hearing
 - 22. Petitions for Assessments
 - 23. Petitions to Vacate Orders
 - 24. Requests for Disciplinary Proceeding Presentations
 - 25. Motions
 - 26. Petitions
 - 27. Appearances from Requests Received or Renewed
 - 28. Speaking Engagements, Travel, or Public Relation Requests, and Reports
- O. Public Comments**

CONVENE TO CLOSED SESSION to deliberate on cases following hearing (s. 19.85(1)(a), Stats.); to consider licensure or certification of individuals (s. 19.85(1)(b), Stats.); to consider closing disciplinary investigations with administrative warnings (ss. 19.85(1)(b), and 440.205, Stats.); to consider individual histories or disciplinary data (s. 19.85(1)(f), Stats.); and to confer with legal counsel (s. 19.85(1)(g), Stats.).

P. Credentialing Matters

1. Application Reviews

- a. K.R.S. – CE Waiver Review

Q. Division of Legal Services and Compliance (DLSC) Matters

1. Administrative Warnings

- a. 26 ACC 0012 – AM.D.

2. Case Closings

- a. 23 ACC 0010, 24 ACC 0012 and 25 ACC 003 – S.C.N.
- b. 24 ACC 004 – J.A.D.
- c. 24 ACC 0007 – R.S.M.U.

R. Deliberation of Items Added After Preparation of the Agenda

- 1. Education and Examination Matters
- 2. Credentialing Matters
- 3. DLSC Matters
- 4. Monitoring Matters
- 5. Professional Assistance Procedure (PAP) Matters
- 6. Petitions for Summary Suspensions
- 7. Petitions for Designation of Hearing Examiner
- 8. Proposed Stipulations, Final Decisions and Order
- 9. Proposed Interim Orders
- 10. Administrative Warnings
- 11. Review of Administrative Warnings
- 12. Proposed Final Decisions and Orders
- 13. Matters Relating to Costs/Orders Fixing Costs
- 14. Case Closings
- 15. Board Liaison Training
- 16. Petitions for Assessments and Evaluations
- 17. Petitions to Vacate Orders
- 18. Remedial Education Cases
- 19. Motions
- 20. Petitions for Re-Hearing
- 21. Appearances from Requests Received or Renewed

S. Consulting with Legal Counsel

RECONVENE TO OPEN SESSION IMMEDIATELY FOLLOWING CLOSED SESSION

T. Vote on Items Considered or Deliberated Upon in Closed Session if Voting is Appropriate

U. Open Session Items Noticed Above Not Completed in the Initial Open Session

ADJOURNMENT

NEXT MEETING: DECEMBER 16, 2026

MEETINGS AND HEARINGS ARE OPEN TO THE PUBLIC, AND MAY BE CANCELLED WITHOUT NOTICE.

Times listed for meeting items are approximate and depend on the length of discussion and voting. All meetings are held virtually unless otherwise indicated. In-person meetings are typically conducted at 4822 Madison Yards Way, Madison, Wisconsin, unless an alternative location is listed on the meeting notice. In order to confirm a meeting or to request a complete copy of the board's agenda, please visit the Department website at <https://dsps.wi.gov>. The board may also consider materials or items filed after the transmission of this notice. Times listed for the commencement of any agenda item may be changed by the board for the convenience of the parties. The person credentialed by the board has the right to demand that the meeting at which final action may be taken against the credential be held in open session. Requests for interpreters for the hard of hearing, or other accommodations, are considered upon request by contacting the Affirmative Action Officer or reach the Meeting Staff by calling 608-267-7213.