

BOARD MEETING MINUTES
S. C. Department of Labor, Licensing, & Regulation
Board of Accountancy
Thursday, August 21, 2025 10:00 a.m.

NOTE: These minutes are a record of the motions and official actions taken by the Board and a brief summary of the meeting.

1. Call to Order

Ken Whitener, CPA, Chair, was present and called the meeting of the South Carolina Board of Accountancy to order on August 21, 2025, at 10:00 a.m., with a quorum present. Other Board members present were: Chip Summers, CPA, Vice Chair, Jayne Maas, CPA, Jada McAbee, CPA, Chris Huggins, CPA, Kelly Epting, CPA, Bob Wood, Public Member, and Charles Brooks, Public Member. Lora Prevatte, Jan Pierce, and Deltrease Hart-Anderson were absent.

LLR staff members participating in the meeting included: Susanna Sharpe, CPA, Board Administrator, Meredith Buttler, Program Director, Chelsea Buchanan, Program Coordinator, Carolyn Sutherland, Advice Counsel, Robby Dean from the Office of Investigations and Enforcement, Jamie Keller, CPA, Investigator, and Kate Barroll from the Office of Disciplinary Counsel.

2. Consent Agenda

Motion

Chip Summers made a motion to approve the agenda, the June meeting minutes, and the absence of Lora Prevatte, Jan Pierce, and Deltrease Hart-Anderson. Charles Brooks seconded the motion, which carried unanimously.

3. Chair's Remarks (Ken Whitener)

Chair Ken Whitener thanked Board members for making time to attend today's meeting.

4. Office of Investigation & Enforcement

A. Number of Open Complaints

Robby Dean briefed the Board on the OIE report. Forty complaints have been received since January 1, 2025. There are ten active investigations and two cases are pending investigation by another agency. Fourteen cases have been closed since January 1, 2025.

Board members asked about length of time of investigations and whether there is a quicker mechanism to prevent further harm in cases that may be more severe. ODC counsel Kate Barroll noted that there are provisions for

things like temporary suspension orders that can be used in the most egregious cases although using these mechanisms is not taken lightly.

B. IRC Report

Robby Dean presented the August 5, 2025 IRC report. Three cases are recommended for letter of caution and five are being recommended for formal complaint.

Motion

Bob Wood made a motion to approve the August 5, 2025 IRC report. Chip Summers seconded the motion, which carried unanimously.

C. Requests for Extension of Time to Complete Investigation

An extension of time to complete investigation is being requested for two cases which are pending investigation by another agency.

Motion

Charles Brooks made a motion to approve the extensions until the next Board meeting, as requested. Kelly Epting seconded the motion, which carried unanimously.

Cases approved for extension are 2022-17 and 2022-48.

Asked if OIE routinely checks in with the outside agency investigating such cases, Robby Dean stated that cases are revisited every 30 days for status updates.

5. Office of Disciplinary Counsel Report

Kate Barroll presented the ODC report for information. There are forty-one open cases with one case pending hearing or agreement. Eleven cases have been closed since January 1, 2025, eight of which have been closed since the June 5, 2025 report.

6. New Business

A. Report from Regulation Task Force and Approval of Proposed Regulation Changes

Susanna Sharpe presented the draft of proposed regulation changes produced by the Regulation Task Force and the minutes from the meetings in July and August.

Motion

Bob Wood made a motion to approve the draft regulation changes. Kelly Epting seconded the motion, which carried unanimously.

Bob Wood commended the task force's work on the draft changes and the high quality of the resulting draft. Ken Whitener and Jayne Maas also expressed thanks to the task force members as well as Board Administrator Susanna Sharpe for her support and keeping the task force focused on the goal.

Motion

Bob Wood made a motion to disband the Regulation Task Force having completed their work drafting proposed changes. Charles Brooks seconded the motion, which carried unanimously.

The draft regulations will be submitted in the next legislative session and if approved, will be come effective upon promulgation by the legislature.

7. Administrator's Report (Susanna Sharpe)

-A licensee update was included in the Board's packet. CPA Retired and Emeritus are still the fastest growing categories.

-The financial reports from June and July were also included in the package. Board members discussed concerns about the loss of revenue as it relates to the ability of the Board to fulfill the duty of funding the items and initiatives outlined in section 40-2-70, 'powers and duties of the Board.'

-The most recent newsletter was included in the board package. Topics covered include S.176 which became effective June 30, the new pathways to licensure in the new statute, the NASBA CPE Audit Service, and the most recent Oath Ceremony.

-2026 meeting dates have been selected and are included in the Board materials.

8. Public Comment

There were no public comments.

9. Adjournment

With no further business to discuss, Board Chair Ken Whitener adjourned the August 21, 2025 Board meeting at 10:51am.