



NOTICE OF PUBLIC MEETING AND REVISED DRAFT AGENDA #2

OREGON BOARD OF ACCOUNTANCY

200 Hawthorne Ave. Ste. D450, Salem, OR 97301

The Board of Accountancy protects the public by regulating the practice and performance of all services provided by licensed accountants.

PUBLIC BOARD MEETING – Thursday, June 4, 2026

This meeting will be held in person at the Board's Salem Offices
An attendance option by **Zoom** is available (a verified account is required) –
Meeting Start time is **8:30 a.m.**

Zoom participants will be placed in a virtual waiting room before the meeting and during Executive Session

BOA Admin is inviting you to a scheduled Zoom meeting.

Topic: Regular Board Meeting

Time: Thursday, June 4, 2026, 08:30 PM Pacific Time (US and Canada)

Join Zoom Meeting

<https://us06web.zoom.us/j/6589430200?pwd=bjI5ZWwrSWdxUnlDRjZBdWJkejUvUT09>

Meeting ID: 658 943 0200

Passcode: mjZS3T

One tap mobile

+17207072699,,6589430200#,,,,*131463# US (Denver)

+12532158782,,6589430200#,,,,*131463# US (Tacoma)

Dial by your location

+1 720 707 2699 US (Denver)

+1 253 215 8782 US (Tacoma)

+1 346 248 7799 US (Houston)

+1 646 558 8656 US (New York)

+1 301 715 8592 US (Washington DC)

+1 312 626 6799 US (Chicago)

Meeting ID: 658 943 0200

Passcode: 131463

Find your local number: <https://us06web.zoom.us/j/knq4azv5R>

ORS 673.015 Statement of public interest in regulating practice of accountancy:

The public interest requires:

- (1) The promotion of reliable information used for guidance in financial transactions and accounting for, or assessing the financial status or performance of, commercial, noncommercial and governmental enterprises;*
- (2) That persons professing special competence in accountancy or offering assurance as to the reliability or fairness of presentation of such information demonstrate their qualifications to do so, and that persons who have not demonstrated and maintained such qualifications, including public accountancy professionals not in public practice, not be permitted to hold themselves out as having special competence or to offer such assurance; and*
- (3) That the conduct of persons licensed as having special competence in accountancy be regulated in all aspects of their professional work and that the use of titles relating to the practice of public accountancy that have the capacity or tendency to mislead or deceive the public as to the status or competence of the persons using the titles be prohibited.*



OREGON BOARD OF ACCOUNTANCY
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DRAFT PUBLIC BOARD MEETING AGENDA
June 4, 2026

This meeting will be held at the Board offices at 200 Hawthorne Ave Ste D450, Salem, OR 97301

Zoom participation option will also be enabled; Meeting participants by Zoom will be placed in a virtual waiting room before the meeting and during Executive Session

1. **8:30 A.M. CALL TO ORDER / ANNOUNCE RECORDING¹ / INTRODUCTION OF BOARD AND GUESTS**
A video recording of the public portion of the meeting will be posted to the Board website after the meeting.
2. **AGENDA REVIEW AND APPROVAL**
3. **EXECUTIVE SESSION UNDER THE AUTHORITY OF ORS192.660(2)(i) Evaluation of Executive Director**
4. **REVIEW OF PUBLIC BOARD SUMMARY**
 - A. Meeting Summary of the October 21, 2025, Board Meeting (*supplemental*)
 - B. Meeting Summary of the January 29, 2026, Board Meeting
 - C. Meeting Summary of the April 29, 2026, Board Meeting
5. **PUBLIC COMMENT**
6. **REPORT FROM OSCPA**
7. **REPORT FROM OAIA**
8. **BOARD WORK SESSION**
 - A. Update on PE/APS Legislative Concept Drafting and feedback from TAC
 - B. Discussion of next steps in PE/APS form registration concept drafting and direction to counsel/staff/LRC
 - C. Update on longer term fiscal picture and need for fee increases and related stakeholder discussions
 - D. Discussion of fee increase related agency backup legislative concept and direction to counsel/staff
 - E. Request from Cynthia Killingsworth to adjust 24 semester hour upper division accounting requirement
9. **NEW BUSINESS**
 - A. SB 1552 Required Rule Implementation (Motion to Authorize Rulemaking)
 - B. Withdrawal of Notice in Board Case 24-019 (Motion)
 - C. Debts Owed to the Board and Recommended for Write-Off under the Board's Debt Collection Policy (Motion)
 - D. Correspondence from Linford & Company LLP on the Commoditization of Trust
 - E. Update from DAS on Training for New Board and Commission members
 - F. BOE and AICPA CPA Performance Examination Update
 - G. NASBA Q1 Results Reports

¹ One or more Board members may be participating by teleconference.

10. **OLD BUSINESS**
 - A. Submission to NASBA of Response to AICPA PEEC Exposure Draft on APS/PE
 - B. Execution of Delegated Authority for Deputy Director Shelley Ostrem

11. **EXECUTIVE SESSION UNDER AUTHORITY OF ORS 192.660(2)(f)(h): CONSIDERATION OF RECORDS EXEMPT FROM DISCLOSURE, COUNSEL ADVICE** *(WORKING LUNCH / APPROXIMATE START TIME OF NOON)*

12. **MOTIONS ON CASES HEARD IN EXECUTIVE SESSION**

13. **CONSIDERATION OF SETTLEMENT PROPOSALS**
 - A. Board Case 2025-013 Beck
 - B. Board Case 2025-017 Woods

14. **REPORT OF CHAIR** (Lyons)
 - A. Appointments to the Board by the Governor Submitted to the Senate (Renomination of Raul Valdivia, CPA)
 - B. Recruitment for future Board Members
 - C. NASBA reports:
 1. NASBA April 2026 Board Meeting
 2. NASBA Pacific Region Report
 3. Appointment of Tonya Moffit to the Audit Standards Board
 4. Activation of Full NASBA Nominating Committee Responsibilities for Jason Robinson
 5. Support for Nomination of Dr. Raymond Johnson for NASBA Vice Chair
 - D. Attendance at NASBA Western Regionals and New Board Member Orientation in Park City, UT
 - E. Committee Appointments and Committee Liaison Appointments

15. **REPORT OF VICE CHAIR** (Valdivia)

16. **REPORT OF TREASURER** (Robinson)
 - A. Fiscal position summary

17. **REPORTS FROM STAFF**
 - A. Executive Director Update (Pittioni)
 - B. Deputy Director Update (Ostrem)

18. **COMPLAINTS COMMITTEE (BOACC)**
 - A. Meeting Summary for April 30, 2026, BOACC
 - B. Report from April 30, 2026, BOACC (Valdivia)

19. **PEER REVIEW OVERSIGHT COMMITTEE (PROC)**
 - A. Report from May 12, 2026, PROC (Hartley)

20. **RATIFICATION REQUESTS**
 - A. CPA Certificates/Permits
 - B. Municipal Audit Roster
 - C. Firm Registrations

21. **ANNOUNCEMENTS AND ADJOURNMENT (estimated at 3:33 p.m.)**
Next Regular Board meeting: Thursday, September 24, 2026, 8:30 a.m.