

Progress Reports from the Mobility Task Force and ALD Task Force

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Agenda

- Define “Mobility”
- Background and update on the Progress of Mobility legislation
- Recent Mobility Developments
- Progress of Accountancy Licensee Database (ALD) implementation
- Discussion of ALD issues
- Closing....Questions?

CPA Mobility Task Force

Chair:

Ronald J. Rotaru, OH

Members:

Albert J. Cannon, OH

Ellis M. Dunkum, VA

Thomas J. Kilkenny, WI

Theodore W. Long, OH

Cynthia H. Norwood, VA

Kenneth R. Odom, AL

Robert H. Temkin, MA

Laurie J. Tish, WA

Douglas E. Warren, TN

Arthur M. Winstead, NC

Staff:

Ed Barnicott, PMP

Ken L. Bishop

Maria Lisa Caldwell

Definition

Mobility = The ability of a licensee to gain a practice privilege outside of their principal place of business through the process of substantial equivalency.

Possible preferred Definition

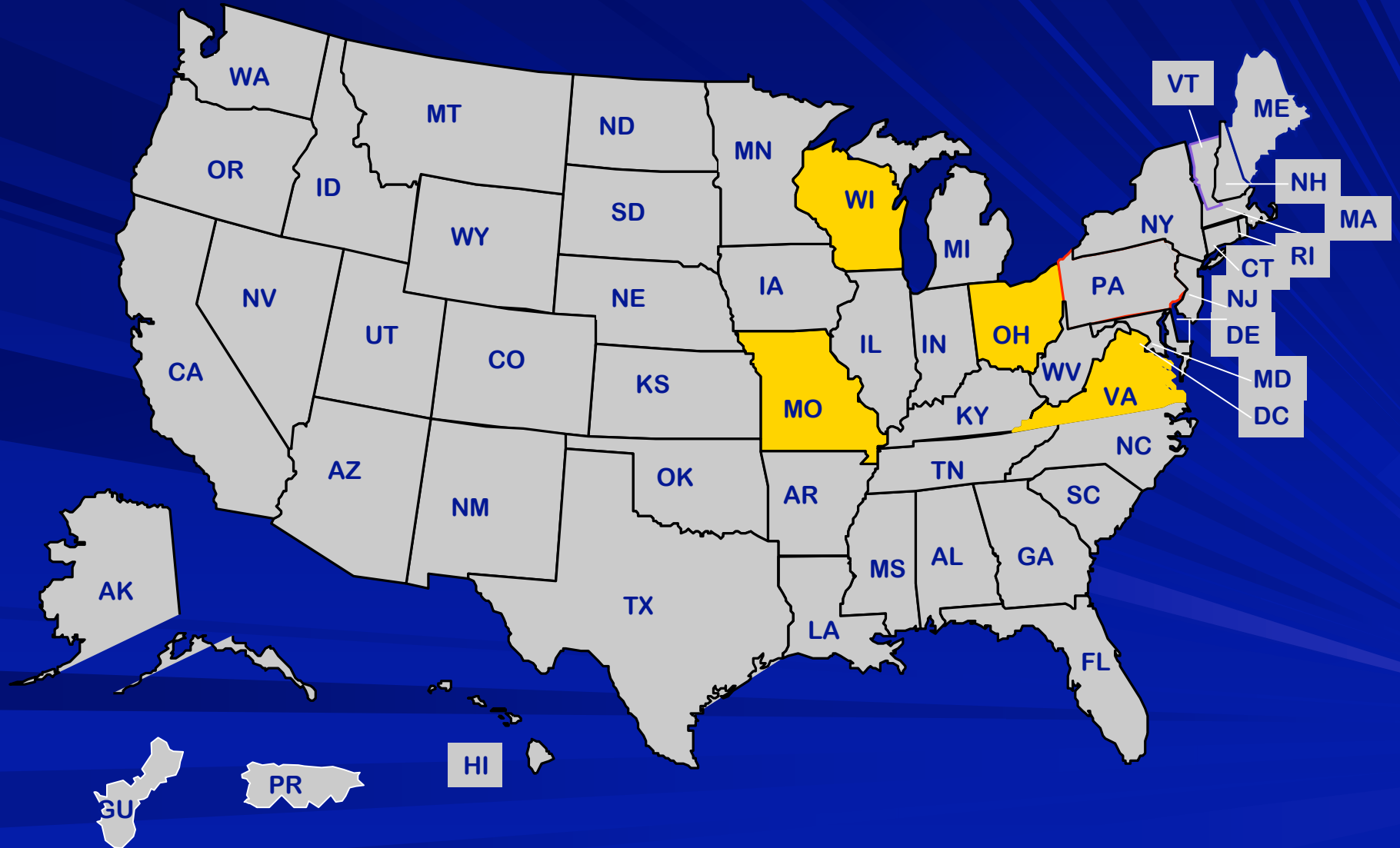
Mobility = The ability of a licensee to gain a *practice privilege* outside of their principal place of business through the process of substantial equivalency allowing consumers of accounting services to use the CPA(s) they know and trust, while retaining the protection of their state Board of Accountancy.

UAA Mobility

- The revisions to Section 7, 14 and 23 of the Uniform Accountancy Act (UAA) provide a comprehensive system for permitting licensee mobility while making explicit the boards' authority to regulate all who offer or render professional services within their jurisdiction regardless of how those services are being provided. These changes achieve the goals of enhancing public protection, facilitating consumer choice and supporting the efficient operation of the capital markets.

January 1, 2007

Mobility



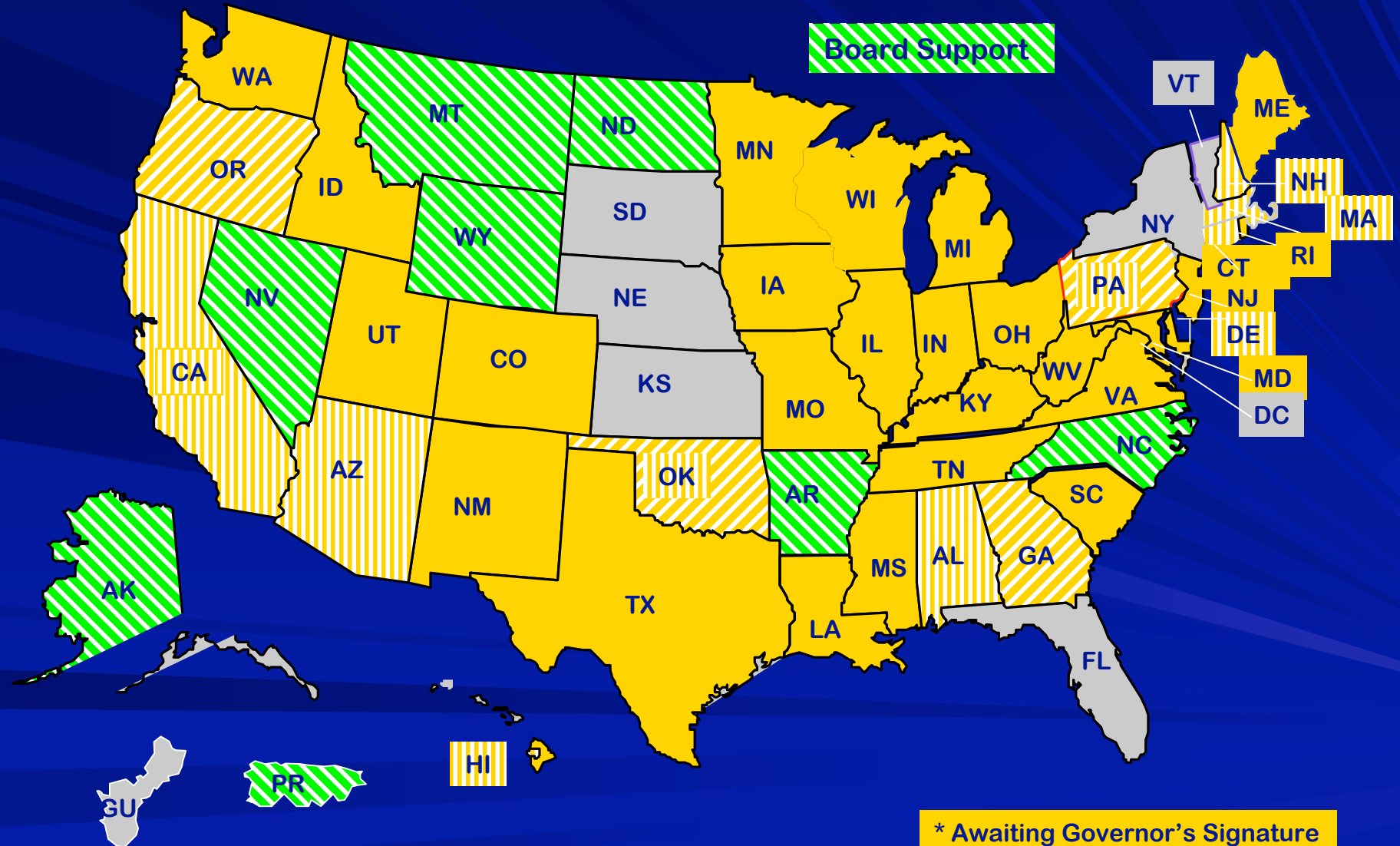
As of June 15, 2008

Mobility

Mobility First Steps

Legislation Introduced

Board Support



* Awaiting Governor's Signature

Score Card for 2008

- 26* States with mobility passed or in place
- 9** States with 2008 Bills introduced
- 35 States have legislation passed or introduced
- 12 State BOAs have voted to support mobility
- 47 States in place, introducing Bills, or voting to support
- 4 States with first steps (OK and GA quid pro quo)

- * NM, WA, ID, UT, WV, MS, KY, IA, MD, CO, MN, CT
NJ, MI and SC in 2008
- ** Plus, an additional 10 Bills are in the pipeline that have not been introduced.

Recent Mobility Developments

- Unprecedented success
- Planning for 2009
- Meetings and conclusions of the Advisory Committee on the Auditing Profession
 - Arthur Levitt, Jr and Donald Nicolaisen co-chairs
 - 12/31/10 “line in the sand”

ALD Task Force

Chair:

Dan Sweetwood, NE

Members:

Rebecca Adams, CT

Patty Bowers, CA

Mark Crocker, TN

Dan Dustin, NY

Heidi Patterson, IA

Richard C. Sweeney, WA

Viki Windfeldt, NV

Lisa Zolman, WA

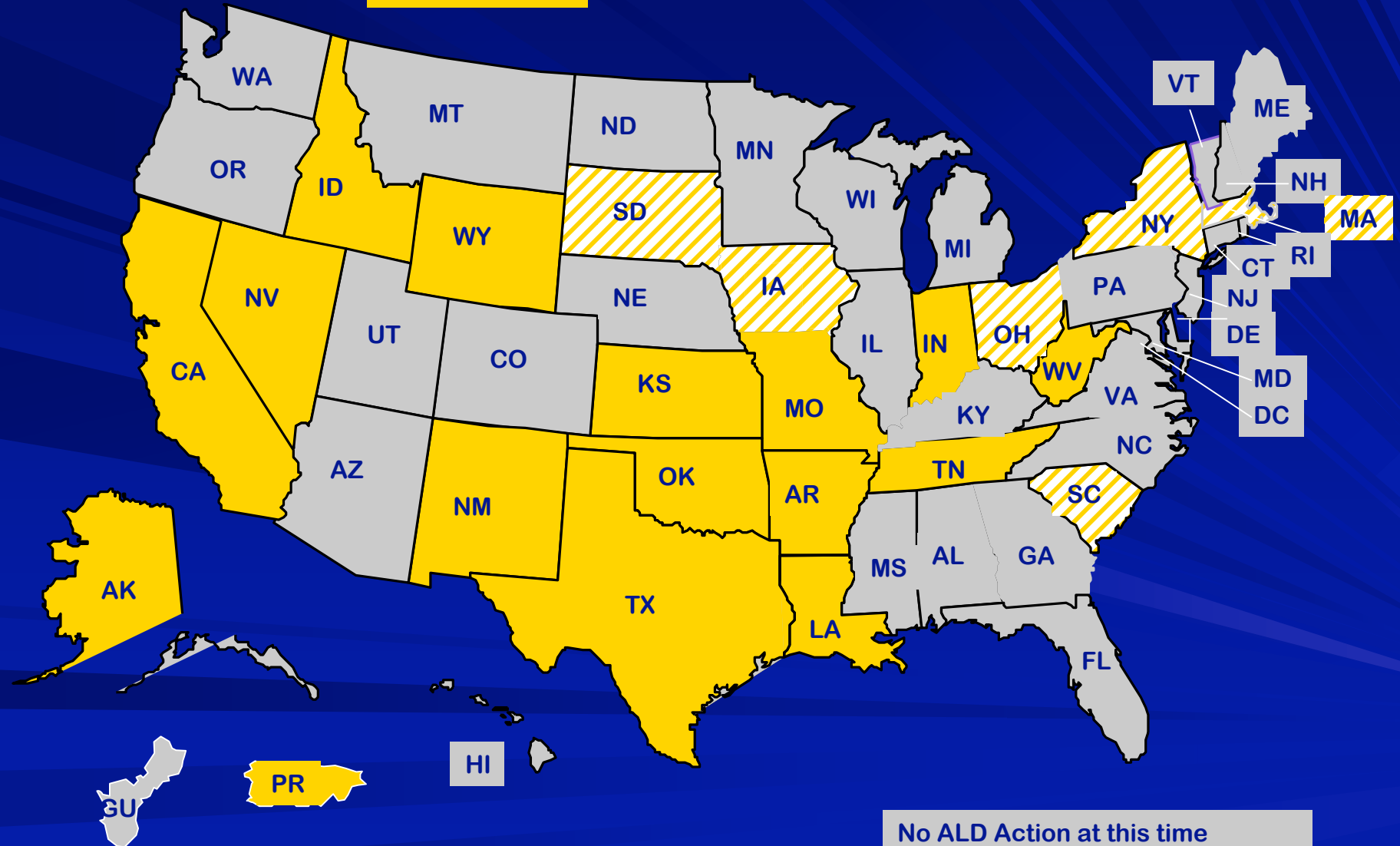
Staff:

Joe T. Cote, NASBA

ALD PARTICIPATION (5/25/08)

ALD Participant

ALD First Steps



No ALD Action at this time

ALD Progress Report

- Sixteen (16) States up and running
- Six (6) States in development
- Five additional States in discussion for implementation

- New Task Force assigned
 - 3 Strike Forces (current state, policy and procedures, and IT)

ALD Issues

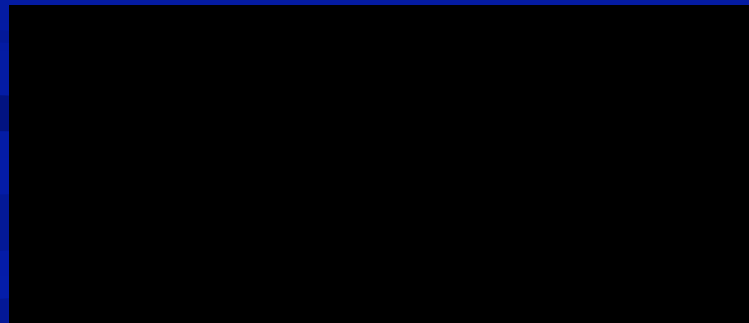
- Getting to 100% participation
 - Political/Policy issues
 - Legal issues
 - Technology issues
- Nexus to mobility success
- Accessible for public/consumer use
- How to resolve disparities in disciplinary jargon and policies

Closing Remarks

Questions



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