

STATE OF MARYLAND
BOARD OF INDIVIDUAL TAX PREPARERS
Business Meeting Minutes
October 29, 2018

TIME: 10:00 a.m.

PLACE: 500 N. Calvert Street
3rd Floor Conference Room
Baltimore, MD 21202

PRESENT: Amy P. Hennen, Chair
Steven P. Wions, Vice Chair
Jane M. Bourassa
Michael Canet
Jacqueline Clarke
Symon M. Manyara
Javier Solis

ABSENT:

Marianela Del-Pino-Rivera
Shanai Jordan, Executive Director

DLLR STAFF

PRESENT: Christopher Dorsey, Assistant Executive Director
Matthew A. Lawrence, Legal Counsel
Alicia Coar, Board Secretary

OTHERS

PRESENT: Tom Brady, MSATP
Thorman Jerry, MRS

Ms. Hennen, Chair, called the meeting to order at 10:01 a.m.

Upon a motion **(I)** by Ms. Bourassa, and seconded by Mr. Manyara, the board unanimously approved the minutes for the September 24, 2018 meeting without corrections.

Report of the Chair

No report of the Chair.

Executive Director's Report

Mr. Dorsey, the Assistant Executive Director, informed the board informed that Mr. Mason Land has resigned and has a new permanent position. He also informed the board that since we do not have an investigator, the investigator from Secondhand Precious Metals, Ms. Tanya Minion, may be helping the board on the investigations that are pending at this time.

Mr. Dorsey informed the board that the RFP is still being worked on, and that we should be hearing from the procurement on the next step in the process shortly.

Upon a motion **(II)** by Mr. Wions, and seconded by Ms. Bourassa, the board unanimously approved the Executive Director's Report.

Investigation Report

No Report.

Examination Committee Report

Ms. Bourassa reported on the examination committee's review of the PSI examination results for September 24 through October 29, 2018. The examination was administered to 17 candidates: 7 passed, 10 failed. There are 86 candidates currently scheduled to take the exam.

Upon a motion **(III)** made by Mr. Wions and seconded by Ms. Clarke, the board unanimously accepted the Examination Committee Report.

New Business

No New Business.

Continuing Education Review

Ms. Coar presented to the board Prince George's Community College's request to be on the DLLR Individual Tax Preparers' web site.

Upon a motion **(IV)** by Mr. Wions and seconded by Mr. Manyara, the board unanimously accepted Prince George's Community College's request with the one correction, that the community college recommend had instructor that has prepared tax returns.

MSTAP

Mr. Michael Kohler of the Maryland Society of Accounting and Tax Professionals addressed the Board and presented MSATP's concerns that there is not an official reporting mechanism for registered tax preparers who encounter violations of the Board's statute and regulations or State or Federal tax law when reviewing clients' tax returns prepared by other individuals. The Board discussed its complaint process and noted that the primary difficulty for the Board is getting releases from taxpayers to be able to review the actual tax returns in question. The Board affirmed its willingness to pursue as far as possible any complaints filed, and also suggested that registered preparers can also contact the IRS or the Office of the Comptroller if they believe an individual has violated State or Federal tax law.

Next Meeting Date

The next meeting of the Board will be held on Monday, November 19, 2018 at 10:00 a.m.

Adjournment

There being no further business, upon a motion **(V)** by Mr. Canet and seconded by Mr. Solis, the board unanimously voted to adjourn the meeting at 11:20 am.

With corrections

Without corrections

Signature on File

Amy P. Hennen, Chair

11/19/18
Date