
STATE OF MARYLAND
BOARD OF INDIVIDUAL TAX PREPARERS
Business Meeting Minutes
August 13, 2018

TIME: 10:00 a.m.

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

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

ABSENT: Amy P. Hennen, Chair
Marianela Del-Pino-Rivera

DLLR STAFF

PRESENT: Shanai Jordan, Executive Director
Christopher Dorsey, Assistant Director
Matthew A. Lawrence, Legal Counsel
Alicia Coar, Board Secretary
Mason Land, Investigator
Breona Scott, Office Services Clerk

OTHERS

PRESENT: Tom Bray, MSATP
Sandy Steinwedel, MSATP

Mr. Wions, Vice-Chair, called the meeting to order at 10:03 a.m.

Upon a motion (I) by Mr. Canet, and seconded by Mr. Solis, the Board unanimously approved the minutes for the March and June board meetings.

Report of the Chair

No report of the Chair.

Executive Director's Report

Ms. Jordan introduced Mr. Christopher Dorsey to the board as the new Assistant Executive Director.

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

Investigation Report

Mr. Land reported to the Board that he has been out in the field checking on the individuals who the Board has sanctioned with fines. Once he has interviewed these individuals and written his investigation reports, he will begin the process of filing criminal charges against the individuals who are illegally preparing tax returns.

Upon a motion **(III)** by Mr. Canet and seconded by Mr. Manyara, the Board unanimously approved the Investigation Report.

Examination Committee Report

No Examination Committee Report.

New Business

Mr. Lawrence informed the Board that the Secretary had requested all boards and commissions to promulgate a uniform regulation regarding responses to official communications. The uniform regulation would apply to applicants as well as licensees, require a response within 30 days of the communication, specify that first class mail notification is sufficient, and specify that a failure to respond within 30 days may lead to disciplinary action. Mr. Lawrence explained that the uniform regulation differs from the Board's existing regulation in that it applies to applicants as well as licensees and that it eliminates the requirement that communications must be sent by certified mail.

The Board decided to create a committee that is responsible for coordinating and presenting at conferences in the state on behalf of the Maryland Board of Individual Tax Preparers, called the State Conference Committee. The members of this committee will be: Javier Solis, Amy Hennen, Marianela Del-Pino River, and Sandy Steinwedel.

Upon a motion **(IV)** by Mr. Canet, and seconded by Mr. Manyara, the Board unanimously voted to propose the above-described uniform regulation concerning responses to official communication and accept the New Business Report.

Next Meeting Date

The next meeting of the Board will be held on Monday, September 24, 2018 at 10:00 a.m.

Adjournment

There being no further business, upon a motion **(V)** by Mr. Wions and seconded by Mr. Solis, the Board unanimously voted to adjourn the meeting at 11:00am.

With corrections

Without corrections

Signature on File

Steve Wions, Vice- Chair

9/24/18

Date