**STATE OF MARYLAND**

**BOARD OF INDIVIDUAL TAX PREPARERS**

**Business Meeting Minutes**

**January 9, 2023**

**TIME:** 10:00 a.m.

**PLACE:** In Person and VIA Google Meet Teleconference

1100 N. Eutaw Street

5th Floor Conference Room

Baltimore, MD  21202

**PRESENT:** Steven P. Wions, Chair

Jane M. Bourassa, Vice Chair

Victoria Kelly

Janice Shih

Brian McCurdy

Javier Solis

Symon Manyara

Mike Kohler

**STAFF**

**PRESENT:**

Kausar Syed, Deputy Commissioner

Christopher Dorsey, Executive Director

Fatmata Rahman, Office Secretary

Jessica Praley, Legal Counsel

**OTHER**

**PRESENT:**

**BOARD/STAFF**

**ABSENT:**

Mr. Wions, Chair, called the meeting to order at 10:02 a.m.

Upon a motion **(I)** by Ms. Bourassa and seconded by Ms. Shih, the Board unanimously approved the minutes for the November 14, 2022.

**Report of the Chair**

During an O&P collaborating more with the Comptroller to identify unregistered tax preparers was presented.

Upon a motion **(ll)** by Mr. McCurdy and seconded by Ms. Shih, the Board unanimously approved the Chair’s Report.

**Executive Director’s Report**

Mr. Dorsey attended a conference hosted by the NATP and gave a presentation on the Maryland Board of Individual Tax Preparers. He stated that he hopes the presentation helped to garner awareness of the Board’s existence and lead to an increase of registered preparers.

Upon a motion **(III)** by Mr. McCurdy and seconded by Ms. Shih, the Board unanimously approved the Executive Director’s Report.

**Examination Committee Report**

Ms. Bourassa reported on the Examination Committee’s review of the PSI examination results for November 14, 2022 through the present. The examination was administered to 240 candidates: 99 passed on the first attempt, 47 failed on the first attempt, 27 repeated and passed, and 67 repeated failed attempts.

Mr. Wions brought to the Board’s attention that multiple candidates reported that the test proctor did not show up on their test date at the PSI College Park and Lord Baltimore locations and that Mr. Dorsey reached out to PSI for an explanation, but was never responded to.

Upon a motion **(IV)** by Ms. Shih and seconded by Ms. Kelly, the Board unanimously approved the Examination Committee Report.

**New Business**

No New Business

**Old Business**

No Old Business

**Closed Session**

Upon a motion **(V)** by Ms. Shih and seconded by Ms. Kelly, the Board unanimously voted to go into closed session at 10:16 a.m.

**Return to Open Session**

At 10:32 a.m., upon a motion **(VI)** by Mr. McCurdy and seconded by Ms. Solis, the Board unanimously voted to return to the open session.

**Adjournment**

There being no further business, upon a motion **(VII)** by Mr. McCurdy and seconded by Mr. Solis, the Board unanimously voted to adjourn the meeting at 10:36 a.m.

**Next Meeting Date**

The next meeting of the Board will be held on Monday, February 13, 2023, at 10:00 a.m.

\_\_\_\_\_With corrections x Without corrections

Signature on file February 13, 2023

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Steven P. Wions, Chair Date