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STATE OF MARYLAND  
**BOARD OF INDIVIDUAL TAX PREPARERS**  
Business Meeting Minutes  
March 26, 2018

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

**PLACE:** 500 N. Calvert Street  
3<sup>rd</sup> Floor Conference Room  
Baltimore, MD 21202

**PRESENT:** Amy P. Hennen, Chair  
Jane M. Bourassa  
Michael Canet  
Marianela Del-Pino-Rivera  
Symon M. Manyara  
Steven P. Wions, Vice Chair

**ABSENT:** Kay D. Riddle  
Jacqueline Clarke

**DLLR STAFF**

**PRESENT:** Shanai Jordan, Executive Director  
Alicia Coar, Board Secretary  
Mason Land, Investigator  
Matthew A. Lawrence, Board Counsel and AAG

**OTHERS**

**PRESENT:** Tom Bray, MSATP  
Sandy Steinwedel, MSATP

Ms. Hennen, Chair, called the meeting to order at 10:05 a.m.

Upon a motion **(I)** by Mr. Wions and seconded by Ms. Bourassa, the Board unanimously approved the minutes from the February 12, 2018 meeting with corrections.

**Report of the Chair**

There was no report of the Chair.

### **Executive Director's Report**

Ms. Jordan reported that there will be a conference held with PSI on April 24-26 to meet with the Tax Preparer Examination Review Committee (ERC). Additionally, the Office of the Secretary has been able to find a replacement board member for Kay Riddle. We anticipate the new member being able to begin their term shortly. She also reported that she is in the process of interviewing candidates to fill the now vacant Assistant Executive Director position.

Upon a motion **(II)** by Ms. Del-Pino Rivera and seconded by Mr. Manyara, the Board unanimously accepted the Executive Director's Report.

### **New Business**

There was no New Business.

### **Investigation Report**

Mr. Land reported to the Board that he has been out in the field checking on the tax preparers that have been issued final orders, to ensure that they are not working if they have not yet resolved their penalty and become properly registered. Once he is finished interviewing the tax preparers and writing his reports, he will be working to have criminal charges issued to the individuals who are continuing to illegally prepare tax returns.

Upon a motion **(III)** by Ms. Bourassa and seconded by Mr. Wions, the Board unanimously accepted the Investigation Report.

### **Examination Committee Report**

Ms. Bourassa reported on the examination committee's review of the PSI examination results for February 13, 2018 through March 26, 2018. The examination was administered to 132 candidates: 49 passed, 83 failed. Upon a motion **(IV)** made by Ms. Del-Pino Rivera and seconded by Mr. Manyara, the Board unanimously accepted the Examination Committee Report.

Upon a motion **(V)** made by Ms. Del-Pino Rivera and seconded by Ms. Bourassa, the Board unanimously voted to go into a closed Executive Session in order to discuss open complaints, and consult with counsel, pursuant to Section 3-305(b)(7) of the General Provisions Article. The Board went into Executive Session at 10:31 a.m.

Upon a motion **(VI)** by Ms. Bourassa and seconded by Mr. Manyara, the Board unanimously voted to return to open session at 11:40 a.m.

Upon a motion **(VII)** made by Mr. Wions and seconded by Mr. Canet, the Board unanimously approved Latonia Shuler's registration renewal.

Upon a motion **(VIII)**, made by Mr. Canet and seconded by Ms. Bourassa, the Board unanimously voted to vacate the final order issued in Case No. MITP-17-0124 (Respondent Yolanda White) and impose an indefinite suspension until such time as Ms. White passes the Maryland Tax Preparers Examination.

Upon a motion **(IX)** by Ms. Bourassa and seconded by Mr. Wions, the Board unanimously accepted the Complaint Committee Report.

**Adjournment**

There being no further business, upon a motion **(X)** by Mr. Wions and seconded by Mr. Canet, the Board unanimously voted to adjourn the meeting at 11:40 a.m.

With corrections

Without corrections

**Signature on File**

Steve Wions, Vice-Chair

8/13/18

Date