

STATE OF MARYLAND
BOARD OF INDIVIDUAL TAX PREPARERS
Business Meeting Minutes
March 29, 2016

TIME: 1:00 PM

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

PRESENT: Fredric "Rob" Bader, Chair
Kay Riddle, Vice Chair
Jane Bourassa
Patricia Snell
Michael Canet
Marianela Del-Pino- Rivera

ABSENT: Theodore "Teddy" Prioleau

DLLR STAFF
PRESENT: Dennis Gring, Executive Director
Matthew Lawrence, Board Counsel and AAG
Alicia Coar, Board Secretary

OTHERS
PRESENT: Mary Beth Halpern, MACPA
Sean O'Shea, Liberty Tax Service
Yalanda Rodney, Mrs. Tax
Alverta Steinwdel, MSATP
Richard Tilghman, ITP
Steve Wions, ITP
Cherby Worthington, ITP

Chairman Bader called the meeting to order at 1:06 PM.

Upon a motion (I) by Ms. Snell, and seconded by Mr. Canet, the minutes of the February 8, 2016 meeting were approved with corrections unanimously.

Report of the Chair

The Chair report was given by Ms. Jane Bourassa. She reports the examination committee will be meeting with PSI on April 27 and 28, 2016 to start working on the new questions for the 2016-2017 Maryland Tax Preparers Examination. She asked the Board members to help with this process, if interested. Ms. Bourassa reported that 474 candidates took the examination during the period February 1, 2016 through March 29, 2016. Ms. Bourassa also reported the current total of registered tax preparers is 3,986. Five candidates have registered that they have the IRS RTRP certificates. There were 27 candidates requesting a waiver from the examination requirement.

Executive Director's Report

Mr. Gring reminded the Board members that they are required to file financial disclosure reports to the State Ethics Commission not later than April 30, 2016 for the year 2015. Financial disclosures can be made through the State Ethics Commission website.

Mr. Gring introduced Diana Carson, an investigator for the Real Estate Commission, who has been assigned to assist Assistant Attorney General Kris King with the Board's ongoing investigation of tax preparers who have been suspended by the Office of the Comptroller from filing tax returns. Mr. Gring will be working with the Complaint Committee and DLLR's Office of the Attorney General to begin scheduling hearings in May and June for a number of unregistered individuals alleged to have been providing individual tax preparation services.

Legislation for 2017

In preparation for the 2017 legislative session, Mr. Gring asked the Board members to begin thinking about any legislative changes the Board may want to propose for consideration by the Office of the Secretary. The Board should be prepared to discuss any legislative proposals over the next several meetings.

New Business

Outreach Campaign in Preparation for 2017 Tax Year

Mr. Gring has spoken to representatives from the California and Oregon Tax Preparer Boards concerning how the respective Boards interpret their laws concerning activities that require a person to be licensed or registered. Mr. Gring distributed copies of advisories and other guidance that these Boards provide. Mr. Gring recommended that the Board consider regulations to clarify this issue.

Montgomery Community College Continuing Education Classes

Alicia Coar advised the Board that she has begun to notice registrants using a continuing education course from Montgomery Community College ("MCC") on their registration renewals. The Board requested that staff obtain a course description and a syllabus from MCC prior to deciding whether to accept the course for continuing education purposes.

Correspondence

The Board discussed correspondence from Alverta Steinwedel of the Maryland Society of Accounting and Tax Professionals ("MSATP"). In her letter, Ms. Steinwedel asked if a candidate registered prior to December 31, 2015 was having problems registering with the Board. At the time, the system had two options to register: (1) was original application and the second was waiver from the examination requirement.. Ms. Steinwedel informed the Board that MSATP has been contacted by some of their members who were frustrated by the system. She would like to know if candidates

can receive a refund. After discussion the Board instructed staff to issue refunds to those applicants.

Executive Session

Upon a motion (VII) made by Mr. Canet, and seconded by Ms. Riddle, the Board voted to go into Executive Session in order to consult with counsel, which is permitted to be closed pursuant to State Government Title Section 10-508 (a), (7). The Board went into Executive Session at 2:10 PM. Upon a motion (VIII) by Ms. Riddle, and seconded by Mr. Canet, the Board unanimously voted to return to public session at 3:00 PM.

In EX-A0316, upon a motion (IX) by Mr. Canet, and seconded by Ms. Riddle, the Board approved the license application of an applicant licensee who answered "Yes" to a conduct question on the application.

In EX-B0316, upon a motion (X) by Mr. Canet, and seconded by Ms. Snell, and Ms. Bourassa abstain her decision. The Board approved the license application of an applicant licensee who answered "Yes" to a conduct question on the application.

EX-C0316 was administratively withdrawn.

EX-F0216 upon a motion () by Ms. Riddle and seconded by Mr. Canet, the Board approved the license application of an applicant licensee who answered "Yes" to a conduct question on the application.

Mr. Canet presented the Complaint Committee report. The Board received 79 complaints from the Comptroller's Office, and six complaints from general public. Upon a motion (XIV) by Ms. Snell, and seconded by Ms. Bourassa, the Board unanimously accepted the Complaint Committee Report.

Next Meeting Date

The next meeting of the Board will be held on Monday, May 9, 2016 at 1:00 PM.

Adjournment

There being no further business, a motion was made by Mr. Canet, seconded by Ms. Riddle and unanimously carried to adjourn the meeting at 3: 05 PM.

With corrections
 Without corrections

Fredric Bader, Chair

Date