**STATE OF MARYLAND**

**BOARD OF INDIVIDUAL TAX PREPARERS**

**Business Meeting Minutes**

**May 12, 2025**

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

**PLACE:** VIA Google Meet Teleconference

100 S Charles St., Tower 1

Baltimore, MD  21202

**PRESENT:** Victoria Kelly, Chair

Symon Manyara

Janice Shih

Jane Bourassa

Alex Franks

Nayo Carter-Gray

Javier Solis

Brian McCurdy

**STAFF**

**PRESENT:** Christopher Dorsey, Executive Director

Sharron McNeill, Administrative Officer II

Paige Bryant, Administrative Specialist III

Robert Pambianco, Legal Counsel

**OTHER**

**PRESENT**: Mary Beth Halpern, MACPA

Yehuda Tenenbaum, MSATP

Jonathan Phillips, Assistant Attorney General

Kyle Jenkins, Court Reporter

**BOARD/STAFF**

**ABSENT:**

**Call to Order**

Ms. Kelly, Chair, called the meeting to order at 10:02 a.m.

Upon motion **(I)** by Mr. Solis and seconded by Mr. Franks, the Board unanimously voted to approve January 13, 2025 open meeting minutes with corrections.

Upon a motion **(II)** by Ms. Carter-Gray and seconded by Ms. Shih, the Board unanimously voted to approve the February 10, 2025 open meeting minutes with corrections.

**Report of the Chair**

None

**Executive Director’s Report**

None

**Examination Committee Report**

Ms. Bourassa reported on the Examination Committee’s review of the PSI examination results from the last meeting until the present. The examination was administered to one hundred sixty-five (165) candidates overall: sixty-one (61) of which were first attempts. Of the first attempts, twenty-five (25) passed and thirty-six (36) failed on their first attempt, thirty-eight (38) repeated attempts passed, and sixty-six (66) had repeated failed attempts.

Ms. Bourassa announced that the PSI Exam Review was held at the Hotel Indigo in Baltimore April 22-24.

Ms. Bourassa reported the examination results from July 1, 2023 - April 22, 2024. The examination was administered to six hundred sixty-six (666) candidates: one hundred sixty-five (165) passed on the first attempt, one hundred eighty-four (184) failed on the first attempt, one hundred nine (109) repeated and passed, and two hundred eight (208) had repeated failed attempts.

Exam will be updated to 2024 tax laws starting July 1, 2025. Also, demographic questions will be added to the survey.

Upon a motion **(III)** by Ms. Carter-Gray and seconded by Mr. Franks, the Board unanimously approved the Examination Committee Report.

**New Business**

Board members were told that elections will be held in June for the roles of Chair, Vice Chair, Examination Committee, and Complaint Committee.

**Old Business**

A discussion was held regarding the suggested changes to the Professional Code of Conduct and the input that was received from the MACPA and MSATP.

**Hearing**

A hearing was held at 11:00am.

**Closed Session**

Upon a motion **(IV)** by Mr. McCurdy and seconded by Ms. Bourassa, the Board voted to move to a closed session at 11:49 am via a Google Meets teleconference, where log-in information was only provided to Board members and staff.

Time: 11:49 am

Place: Virtual

Persons Present: Kelly, Shih, Solis, Bourassa, McCurdy, Franks, Manyara, Carter-Gray (members); Dorsey, McNeill, Bryant (board staff); Pambianco (counsel).

Subject Matter: Hearing deliberations and disclosures on applications.

**Return to Open Session**

Upon a Motion **(V)** by Mr. Manyara and seconded by Mr. Solis, the Board unanimously approved the motions made during the Closed Session.

**Adjournment**

There being no further business, upon a motion **(VI)** by Mr. Manyara seconded by Mr. Franks, the Board voted unanimously to adjourn the meeting at 12:37 p.m.

**Next Meeting Date**

The next meeting of the Board will be held on Monday, June 9, 2025, at 10:00 a.m.

\_\_x\_\_With corrections Without corrections

Signature on file 6/10/2025

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Victoria Kelly, Chair Date