

**COUNCIL OF TAXATION SECTION
MINUTES OF REGULAR MEETING**

April 8, 2026

A regular meeting of the Council of the State Bar of Michigan Taxation Section was held on Wednesday, April 8th, 2026, at 11:00 a.m. The meeting was held virtually, via Zoom. Mr. Ryan Peruski, Chairperson of the Taxation Section, presided.

COUNCIL MEMBERS PRESENT

Ryan Peruski	Erick Hosner	Eric Gregory
Rebecca Pugliesi	Josh Bemis	Gene Magidenko
Joe Peterson	Sheridan DuPont	Christina Wease
Sam Kopacz	Negah McKevitt	

COUNCIL MEMBERS ABSENT

Jennifer Watkins	Chris Attar	Nick Papasifakis

COMMITTEE CHAIRPERSONS PRESENT

Katina Gorman	Kathryn Ahlbrand	Bella Jordan
Scott Foess	Joseph Haddad	

COMMITTEE CHAIRPERSONS ABSENT

OTHERS PRESENT

Rob Heitmeyer	Barb Barratt	

Mr. Peruski called the meeting to order at 11:03 a.m. A quorum was determined to be present.

APPROVAL OF PRIOR MEETING MINUTES

The February 25th, 2026, meeting minutes were reviewed and discussed. Upon motion by Mr. Gregory and seconded by Mr. Peterson, the minutes were unanimously approved and adopted with no updates.

TREASURER'S REPORT

Mr. Gregory provided an update to the treasurer's report. Mr. Gregory noted that the report has been updated to the end of February including expenses for various events that have occurred thus far this year. Mr. Gregory noted to Committee Chairs that the best way to maintain connections and to build something better for the section is through networking events. Mr. Peruski echoed those comments and noted that there has been a few successful events so far this year.

COUNCIL ACTIVITIES

1. Strategic Planning & Membership Outreach – Nick Papasifakis

Mr. Papasifakis was not in attendance and did not provide a report.

2. Public Communications – Negah McKevitt

Ms. McKevitt was in attendance and had nothing new to report at this time.

3. Michigan Tax Lawyer – Sheridan DuPont

Ms. Dupont was in attendance and noted that she is still awaiting any drafts of articles to be published in the next edition of the Michigan Tax Lawyer. That edition is expected around July 4th. Additionally the last installment was published last month on March 3rd.

4. Tax Court Luncheons and Annual Dinner – Chris Attar

Mr. Attar was not in attendance but did provide a report. Mr. Attar noted that the Section is set with the Townsend for the Annual Meeting and Dinner on Thursday, September 17th. Ms. Barratt will send invitations to the section.

5. 2026 Annual Tax Conference – Gene Magidenko

Mr. Magidenko was in attendance and reminded the group that the Annual Tax Conference is coming up on May 21st. Additional marketing will occur up to the conference. Mr. Peruski encouraged folks to register.

6. 2027 Annual Tax Conference– Joe Peterson

Mr. Peterson was in attendance and noted that that communications were sent for the 2026 Student Achievement Award. Some nominations were already received.

7. Legislative Update and Policy Liaison – Jennifer Watkins

Ms. Watkins was not in attendance and did not provide a written report.

8. Grant Program – Sam Kopacz

Ms. Kopacz was in attendance. Ms. Kopacz has sent out the grant application and notices to previous awardees. Applications are due April 30th. Ms. Kopacz also noted that a couple reminder messages will be sent.

9. Pro Bono Project/Community Service Initiative Coordinator – Christina Wease

Ms. Wease was in attendance and provided a report. Ms. Wease noted that the group hosted an event on March 26th at Golf Loft. The event had a great turnout, and many people enjoyed the networking opportunity. The group will look to hold a similar event again in the fall.

Ms. Wease also noted that pro bono outreach has continued for the past few months.

10. SBM Board of Commissioners Liaison – Sherrie Detzler

Ms. Detzler was in attendance and noted several upcoming SBM events.

11. IRS Area Counsel Liaison Report – Eric Skinner and Rob Heitmeyer

Mr. Heitmeyer was in attendance and noted that the Tax Court will be in Michigan on September 14th and November 30th. Once identified, Mr. Heitmeyer will provide the names of the Judges presiding.

12. Probate & Estate Planning Section Liaison Report – Neal Nusholtz

Mr. Nusholtz was not in attendance and did not provide a report.

13. Program Administrator Report – Barbara Barratt

Ms. Barratt was in attendance and asked for everyone to let her know about upcoming events to add to the calendar.

COMMITTEE ACTIVITIES

14. Employee Benefits – Katina Gorman

Ms. Gorman was in attendance. Ms. Gorman noted that the Employee Benefits Group will have in person networking event in the spring.

15. Estates and Trusts – Joseph Haddad

Mr. Haddad was in attendance. Mr. Haddad noted that an event in connection with Mr. Attar is currently being planned. The event will likely have both an educational and networking component.

16. Federal Income Tax – Bella Jordan

Ms. Jordan was in attendance and noted that several events are in the planning phase. Additional details will follow at the next meeting.

17. State and Local Taxation – Scott Foess

Mr. Foess was in attendance. Mr. Foess communicated that he had a call with the Detroit Chamber and Citizens Research about a property tax reform event upcoming. The event will likely be around the beginning of June.

18. Young Tax Lawyers – Kate Ahlbrand

Ms. Ahlbrand was in attendance. Ms. Ahlbrand teamed with Ms. Wease on the golf networking event.

OLD BUSINESS and NEW BUSINESS

Old Business:

No old business was discussed.

New Business:

Past Chair Speaker Series: Carolee Kvoriak joined the meeting as this month's presenter in the Past Chair Speakers Series. Mr. Peruski introduced Ms. Kvoriak and thanked her for spending the time with us.

Ms. Kvoriak shared her long-standing involvement with the Section, beginning with the SALT Committee and ultimately serving as Chair from 2017–2018. She expressed strong support for the Past Chairs speaker series and emphasized the importance of rebuilding engagement following COVID, noting the value of in-person events despite busy schedules. Ms. Kvoriak highlighted the benefit of SBM programming for young lawyers and students, particularly events that provide exposure to different career paths. She also provided an overview of her background, including her education at Wayne State, early experience at Miller Canfield and Honigman, time in-house at Magna, and her current role in the energy space. Ms. Kvoriak noted she became involved in SBM leadership around 2010 and emphasized the importance of participation for both technical learning and networking, pointing to the strength of specialized committees and relationships built across practice areas. She shared that her favorite role was Treasurer and encouraged members to intentionally set aside time each week to stay engaged and support the section.

CLE Proposal: The Section received an outreach from a Georgia-based law firm regarding Section 7508A interest relief, including a presentation deck and an offer to present to Council or a committee. The firm has recently presented to other state bars and indicated the content would provide an overview of recent developments and their approach to assisting clients, noting a July 10th deadline to seek relief and requesting a timely opportunity

to present. The group discussed the potential presentation, including pros and cons, and ultimately decided to decline moving forward.

Business Law Bootcamp: Mr. Peruski provided an update on Tax Section involvement in the Fundamentals program, noting its prior history at Honigman and subsequent transition to MSU. He noted that he has connected with the Business Section, which has a designated planner for its Business Bootcamp, with upcoming sessions scheduled in Grand Rapids in November and Ann Arbor in the spring. The Tax Section plans to collaborate by providing two sessions (one in the fall and one in the spring), with the incoming conference chair leading the effort each year. The group discussed this as a strong opportunity to expand the reach of the Fundamentals program, increase visibility with a broader audience, and leverage support from the Business Section and ICLE in planning and execution. The collaboration is expected to benefit the section by creating additional speaking opportunities for members and enhancing overall programming.

Great Lakes Legal Conference: The Conference this year will be held June 11th-13th.

There being no further business, on motion from Ms. Pugliesi seconded by Mr. Gregory, Mr. Peruski adjourned the meeting at 12:45 pm.

Respectfully submitted,

A handwritten signature in cursive script that reads "Josh Bemis".

Josh Bemis
Secretary