Commonwealth of Massachusetts

Travel Authorization Form (TAF)

1. Date of Request	2. Travel Request #	3. Department/Division	4. DEPT/ORGN:	5. Appropriation #
02/26/26		MA DOR/Tax Policy		

6. Name of Traveler	7. Title	8. Dates of Travel
Rebecca H. Forter	Deputy Commissioner	From: 03/17/26 To: 03/19/26

9. Travel Itinerary and Justification

To attend and speak at the American Bar Association (ABA) Section of Taxation – 2026 ABA-IPT Advanced Tax Seminars in The Ritz-Carlton New Orleans.

Attached supporting documentation (conference agendas, brochures, etc.)

10. Expenses

	Personal Funds	MA State Funds	Federal Funds	Other (describe in #12)
Transportation: (check all that apply) ☐ Rail ☐Bus ☑Airfare ☐Car: ☐ State ☐Personal ☐Rental ☑Taxi ☐Other:				$ 436.89
Lodging: Ritz Carlton New Orleans				$ 739.55
Meals:				
Other: (please list):				
Subtotal	$ 0.00	$ 0.00	$ 0.00	$ 1,176.44
			Grand Total:	$ 1,176.44

11. Certifications and Authorizations (See G.L. c. 30, §25B)

I hereby certify under the pains and penalties of perjury that, to the best of my knowledge, the above information is true and correct.

Signature of Traveler: /s/Rebecca H. Forter — Date: 2/26/26

I hereby certify that sufficient funds are available for the above described travel accommodations.

Signature of Agency CFO: Timothy Rooney — Date: 03/02/2026

I hereby authorize the anticipated travel described above and related expenses listed in this form.

Signature of Traveler's Appointing Authority: Kim D Gust — Title: Chief of Staff — Date: 2/27/2026

I hereby authorize the anticipated travel described above and related expenses listed in this form.

Signature of the Traveler's Cabinet Secretary: Matthew J. Gorzkowicz — Date: 3/12/2026

12. Travel Funded By Private Entity, Foreign Government Entity, or Federally Recognized Tribe:

Travel Funded By Private Funds: ■Yes ☐No

If Yes: $ 1176.44 **Source (Contact Information):** Tim Brady - Tim.Brady@americanbar.org

TRAVEL FUNDED BY PRIVATE SOURCES MUST BE DISCLOSED TO AND AUTHORIZED BY APPOINTING AUTHORITY PURSUANT TO 930 CMR 5.08 (2)(d)(1). FOR THE APPROPRIATE FORM GO TO: https://www.mass.gov/disclosure-forms

13: Upon final approval, the Cabinet Secretary shall ensure that a copy of this form is distributed to:

☐ **A&F Budget Director & The Office of the Comptroller (please check once complete)**

ABA Advanced Tax Seminar 2026

New Orleans Invitation: Email

From: Olga J. Goldberg <ogoldberg@PierceAtwood.com>
Sent: Thursday, January 22, 2026 3:50 PM
To: Forter, Rebecca H. (DOR) <forterr@dor.state.ma.us>
Subject: Speaking Invitation - ABA/IPT **EXTERNAL EMAIL**

Hi Rebecca –

I hope all is well!

I'm reaching out to see if you would be interested in speaking at the Administrators' Roundtable at the ABA/IPT Advanced Sales and Use Tax Seminar in New Orleans. I know we tried to recruit you last year, but the scheduling didn't quite work, and I'm hoping for better luck this year. The panel is scheduled for Wednesday, March 18 for 12:35-1:45 pm. I'm told it will be snowing in Boston that day.

ABA offers travel reimbursement, including your flight and accommodations.

We would be delighted to have you. Please let me know if you can make it and reach out with any questions.

Thanks, Olga

Olga J. Goldberg

PIERCE ATWOOD LLP

Merrill's Wharf
254 Commercial Street

Portland, ME 04101

PH 207.791.1180

FAX 207.791.1350

ogoldberg@PierceAtwood.com

Admitted in ME, MA, NH

This e-mail was sent from Pierce Atwood. It may contain information that is privileged and confidential. If you suspect that you were not intended to receive it please delete it and notify us as soon as possible.

Hotel $ 739.55

Thank you for booking with us, Ms. Rebecca Forter.

The Ritz-Carlton, New Orleans

921 Canal Street New Orleans, Louisiana 70112 USA

Tue, Mar 17, 2026 – Thu, Mar 19, 2026

Confirmation Number: [redacted]

Check-In: Tuesday, March 17, 2026 04:00 PM

Check-Out: Thursday, March 19, 2026 12:00 PM

Number of rooms	1 Room
Guests per room	2 Adults
Guarantee Method	Credit Card Guarantee, American Express
Total for Stay (all rooms)	739.55 USD

Room 1

Room Type › Deluxe King Room, Guest room, 1 King

Guaranteed Requests:

None

ALL REQUESTS ›

Rebecca Forter ABA New Orleans March 17-19, 2026

Flights

$173.40 and $163.49 = $ 336.89

Passenger Info

Name: REBECCA FORTER
SkyMiles [redacted]

FLIGHT	SEAT
DELTA 1398	22A

Visit delta.com or download the Fly Delta app to view, select or change your seat. If you purchased an upgrade or a Trip Extra, please visit My Trips to access a receipt of your purchase.

Tue, 17MAR	DEPART	ARRIVE
DELTA 1398 Delta Main Classic (U)	BOSTON 11:20AM	NEW ORLEANS 02:09PM

MANAGE MY TRiP

Flight Receipt

Ticket #: [redacted]
Place of Issue:
Issue Date: 11FEB26
Expiration Date: 11FEB27

METHOD OF PAYMENT	
[redacted]	$173.40 USD

CHARGES	
Air Transportation Charges	
Base Fare	$146.98 USD

Taxes, Fees and Charges	
United States - September 11th Security Fee(Passenger Civil Aviation Security Service Fee) (AY)	$5.60 USD
United States - Transportation Tax (US)	$11.02 USD
United States - Passenger Facility Charge (XF)	$4.50 USD
United States - Flight Segment Tax (ZP)	$5.30 USD
TICKET AMOUNT	**$173.40 USD**

Checked Bag Allowance

The fees below are based on your original ticket purchase. Fees may be converted to local currency based on your departure airport. **If you qualify for free or discounted checked baggage**, this will be taken into account when you check in. Visit delta.com for details on baggage embargoes that may apply to your itinerary and for additional baggage policy updates.

Tue 17 Mar 2026		BOS-MSY
CARRY ON	FIRST	SECOND
FREE	$35.00 USD (50LBS/23KG) OR 3,500 miles	$45.00 USD (50LBS/23KG) OR 4,500 miles

This trip is operated by Delta and the following carrier(s): . Visit delta.com for details on baggage embargoes that may apply to your itinerary. Also see other carrier's complete baggage information.



You're all set to jet.

Your Flight Itinerary

Your JetBlue confirmation code is [redacted]

MSY ▶

Flight 0400

▶

BOS

jetBlue

Thu, Mar 19		Thu, Mar 19
10:45 AM	-	**3:07 PM**
Terminal: 1 North		

Get the latest entry and travel requirements for your trip.

All travelers 18+ flying within the U.S. need a state-issued REAL ID-compliant license or another acceptable form of ID (such as a passport or Global Entry card). Effective 2/1/26, travelers who do not have REAL ID-compliant identification are required by TSA to verify their identity with a TSA ConfirmID (subject to $45 fee). Learn more about TSA ConfirmedID **here**.

Your Traveler Details

REBECCA FORTER

New Orleans

MSY

TrueBlue Number:

[redacted]

Boston

Ticket number:

[redacted]

New Orleans

Flight # 0400

MSY

Fare: Blue

Seat: 19D

Boston

BOS

Manage my booking

Bag Allowance (per traveler)

MSY ▶

▶

BOS

Personal Item	Carry-on	1st Bag	2nd Bag
Free	Free	From $ 35.00* Up to 50 lbs Add bag now	From $ 50.00* Up to 50 lbs Add bag now

Size and weight limits apply. See full details on our Bag Info page ▶

—

Additional charges may apply.

Need to check more than 2 bags? Additional bags can be added during check-in (starting 24 hours before departure) or at the airport.

Payment Details

[redacted]

Purchase Date: Feb 11, 2026
Request full receipt

Credit Card	$163.49
Non Refundable	$137.76
Taxes & fees	$25.73
Total	**$163.49 USD**

Get onbord with premium perks.

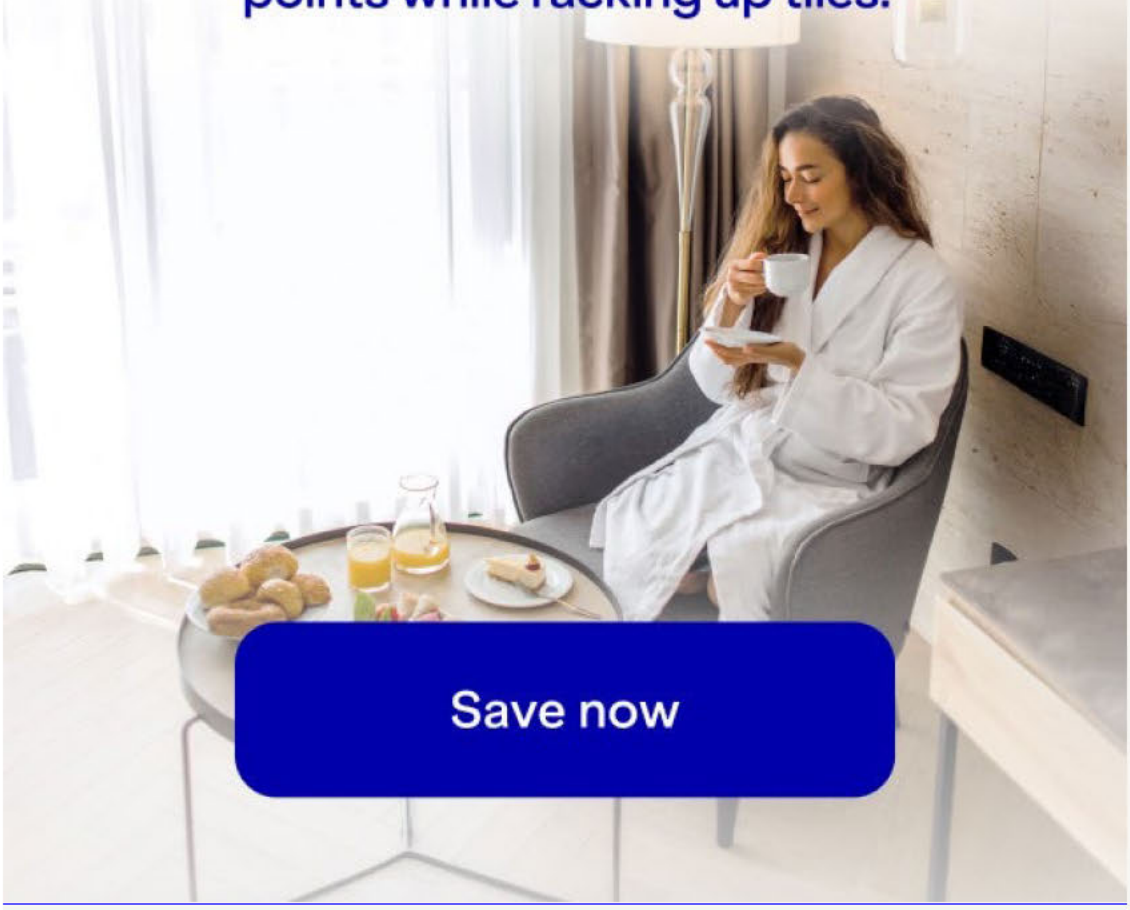
EvenMore® gives you extra legroom (& a seat located toward the front), dedicated bin space, free inflight alcoholic drinks**, a premium snack offering and priority security (30+ airports).

Purchase EvenMore®

TRUEBLUE travel™

Unlocked: up to 20% off hotels.

Enjoy exclusive savings on TrueBlue Travel, all because you booked a JetBlue flight. Plus, earn and redeem TrueBlue points while racking up tiles.



Save now

Get ready for our upcoming trip to Boston, MA (BOS) with a free checked bag when you apply and get approved for the JetBlue Plus Card.

Registration

Event: 2026 ABA-IPT Advanced Tax Seminars

Dates: March 16, 2026 - March 20, 2026

Time: 8:00 AM

Confirmation Number: [redacted]

Order Summary

REBECCA FORTER

Order Date :
12-Feb-2026 1:58 PM CT

Invoice Number : [redacted]

Summary

Item	Price	Amount Paid	Amount Due
Advanced Sales/Use Tax Seminar ONLY	$0.00	$0.00	$0.00
Advanced State Income/Use & Sales Tax Joint Lunch - Blackened Tuna Bahn Mi Sandwich	$0.00	$0.00	$0.00
		Subtotal:	$0.00
		Total Amount Paid:	$0.00
		Balance Due:	$0.00