National Taxpayer Advocate
PUBLIC FORUMS

Convened by Nina E. Olson, National Taxpayer Advocate

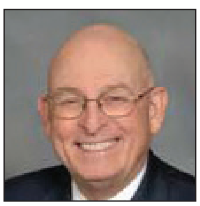
Auditorium | IRS Building | 1111 Constitution Avenue, Washington DC

Tuesday, May 17 | 10:00 am – 3:30 pm

Nina E. Olson

Nina E. Olson, the National Taxpayer Advocate, is the voice of the taxpayer at the IRS and before Congress. Under her leadership, the Taxpayer Advocate Service helps hundreds of thousands of people every year resolve problems with the IRS and addresses systemic issues within the IRS. Her Annual Report to Congress identifies the most serious problems facing taxpayers and recommends solutions. In 2014, the IRS adopted the Taxpayer Bill of Rights for which Ms. Olson had long advocated, placing dozens of existing rights in the Internal Revenue Code into ten fundamental rights, and making them clear, understandable, and accessible for taxpayers and IRS employees alike. Tax Analysts recently honored Nina Olson as one of ten Outstanding Women in Tax for 2016. This recognition reflects Nina Olson's influence on the work of legislators, tax administrators and tax professionals across the globe. She is a graduate of Bryn Mawr College and North Carolina Central School of Law, and she holds a Master of Laws degree in taxation from Georgetown University Law Center.

Panel 1



Lawrence B. Gibbs

Lawrence B. Gibbs grew up in Dallas, Texas and graduated from Yale University (magna cum laude) with a Bachelor of Arts degree in 1960 and from the University of Texas School of Law (with honors) where he received a LLB degree in 1963.

He was admitted to the Bar of the State of Texas and began to practice law in Corpus Christi, Texas in June 1963, with the law firm of Branscomb, Gary, Thomasson & Hall. He also is a member of the Bar of the District of Columbia. Larry initially came to Washington, D.C. in November 1972 when the then Secretary of the Treasury, George Shultz, appointed him to become the Deputy Chief Counsel of the IRS. He also served as Acting Chief Counsel in 1973 until the then IRS Commissioner, Don Alexander, appointed him to serve as the Assistant Commissioner (Technical) of the IRS. Larry left the IRS in January 1976 to become a member of the Dallas, Texas law firm of Hewett, Johnson, Swanson & Barbee. Ten years later in August 1986 later Larry returned to Washington, D.C. when then President Ronald Reagan appointed him and the Senate confirmed him to become the Commissioner of the IRS. In 1989 Larry returned to private law practice as a member of the Washington, DC office of his prior Dallas law firm, and since 1994 he has been a member of the law firm of Miller & Chevalier in Washington, D.C.

Larry is an Advisory Trustee of the Southern Federal Tax Institute. He is member of the American Law Institute, the American College of Tax Counsel, the American College of Trust & Estate Counsel, the Board of Directors of Tax Analysts, and the Taxation Section of the American Bar Association, where he serves on the Committees of Administrative Practice, Formulation of Tax Policy, and Tax Court Appointments. In 1989 Larry received the Treasury's Alexander Hamilton Award. He also has received the Distinguished Service Award from the Tax Executives Institute, the Kenneth S. Liles Award for Distinguished Service from the Federal Bar Association, the Pillar of Excellence Award from the Tax Council Policy Institute, and the Distinguished Service Award of the Taxation Section of the American Bar Association. Two years ago the Tax Section of the Texas State Bar recognized Larry with its Tax Legend Award. Larry has been consistently recognized for his expertise in the Federal tax area by inclusion in The Best Lawyers in America and Chambers USA. Larry has lectured about tax and tax related subjects throughout the last fifty years that he has been practicing federal tax law in the private and public sectors.

Caroline Bruckner

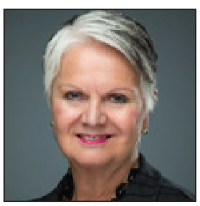
Prof. Bruckner is on the faculty of American University's Kogod School of Business and is the managing director of the Kogod Tax Policy Center, which researches tax issues specific to small businesses and entrepreneurs. She previously worked for the U.S. Senate Committee on Small Business and Entrepreneurship from 2009 through 2014, ultimately as Chief Counsel, where she worked on small business tax legislation and advised the committee and its chair on tax, labor and budget matters. Prior to public service, Bruckner was a Senior Associate with the international tax services group of Pricewaterhouse Coopers, LLP - Washington National Tax Services (PwC-WNTS), where she advised clients on international tax issues. Before joining PwC-WNTS, she served as an associate in the employee benefits group of Paul, Hastings, Janofsky & Walker, LLP. In 2004, Bruckner earned an LLM in tax from Georgetown University Law Center, a JD from George Mason University School of Law, and is a graduate of Emory University.

Marylouise Serrato

Marylouise Serrato is the Executive Director of Americans Citizens Abroad, Inc. (ACA). ACA is a Washington, DC headquartered section 501(c)(4) exempt organization whose mission is to educate, advocate and inform the US Government and US citizens living and working overseas on issues of concern to the overseas American community. ACA works to find practical solutions to resolve issues affecting overseas US citizens and communicates results to constituents stateside and abroad.

In her role as Executive Director, Marylouise is responsible for directing the management and operations of the organization and is the organization's spokesperson to the media and liaison to Congress.

Marylouise has lived internationally for over 20 years. She holds a degree in Business Administration, from San Francisco State University. Prior to joining ACA, Marylouise worked at advertising agencies, Allen & Dorward, BBD&O and McCann-Erickson, developing communication plans for both consumer goods and services accounts, as well as new product development and test marketing.



Johnette Hartnett

Since 2003, Dr. Johnette Hartnett has served as Senior Director of Strategy and Research for National Disability Institute, where she co-founded the Real Economic Impact Tour, a revolutionary free tax preparation and asset-building initiative, that has served over 3 million taxpayers with disabilities. As former Co-Principal Investigator for the Burton Blatt Institute, Johnette led the study and testing of implementation of various educational strategies for building economic self-sufficiency for people with disabilities. Her additional asset development and tax policy work as Director of Public Policy and PI Asset Accumulation and Tax Policy Research for the Law Health Policy and Disability Center at University of Iowa's College of Law led to a ground-breaking, national Ford Foundation research initiative which defined the needs of taxpayers with disabilities. Previously, Johnette additionally served as Vice President of the NCB Development Corporation and Assistant Research Professor in both the Department of Education and Center on Disability and Community Inclusion at the University of Vermont. She also worked on behalf of individuals with disabilities in the reauthorization of welfare under Sen. Rockefeller as a Joseph P. Kennedy, Jr. Congressional Fellow in the 107th Congress.

"My Dad had Cerebral Palsy and a fifty-year career as a biochemist, preparing young men for medical school. My Mother had polio as a teen, spent a year in an iron lung, became a registered nurse and raised four children. My siblings and I succeeded because their abilities were recognized, cultivated and encouraged by the collective environments of their day — integral in helping both my parents reach their full human potential."

Panel 2

Eric L. Green

Eric is a partner in Green & Sklarz LLC, a boutique tax firm with offices in Connecticut and New York. The focus of Attorney Eric L. Green's practice is civil and criminal taxpayer representation before the Department of Justice Tax Division, and Internal Revenue Service. He is a frequent lecturer on tax topics for CCH, the NAEA, the NATP, the ABA Tax Section and the Connecticut Society of CPAs. Attorney Green has served as adjunct faculty at the University of Connecticut School of Law. He is the author and lecturer of the CCH IRS Representation Certificate Program, and he is a columnist for CCH's Journal of Practice & Procedure.

Attorney Green was the 2010 Nolan Fellow of the American Bar Association. Attorney Green is a past Chair of the Executive Committee of the Connecticut Bar Association's Tax Section, and is a Fellow of the American College of Tax Counsel ("ACTC").

Troy K. Lewis

Troy Lewis is the Chair of the Tax Executive Committee for the Tax Section of the American Institute of CPAs (AICPA) in Washington, DC. In this role, he has testified before the Senate Finance Committee and the House Committee on Small Business, most recently on "How Tax Compliance Obligations Hinder Small Business Growth."

Mr. Lewis has been active with the AICPA for over 16 years and with his local state society, Utah Association of CPAs, for over 20 years.

Mr. Lewis currently teaches at Brigham Young University. He is in practice as a Manager/Member at Lewis & Associates, CPAs, LLC. He obtained his Master's and Bachelor's of Accountancy from Brigham Young University. He is also a Certified Public Accountant (CPA) and a Chartered Global Management Accountant.

Robert Kerr

Robert Kerr is the Senior Director, Government Relations of the National Association of Enrolled Agents (NAEA). He represents the interests of enrolled agents before the United States Congress and serves their liaison to the Internal Revenue Service. He is also a frequent lecturer, typically on tax policy and tax administration issues, and speaks before EAs and other tax professionals.

Prior to joining NAEA, Kerr worked on the Senate Finance Committee Oversight and Investigation staff. While on the O&I staff, he assisted then-Chairman Grassley in providing oversight to IRS over a range of issues.

Also prior to joining NAEA, Bob spent a dozen years in a variety of positions at the IRS. He was a project manager in the agency's research division where he headed multiple electronic filing research projects and counts among his accomplishments the first internet-filed income tax returns and the creation of the accompanying Form 8453-OL.

Bob holds a BA degree in finance from Mount Union College and an MBA from Case Western Reserve University, both of which are in his home state of Ohio. Interested tax professionals may follow him on Twitter (@NAEA_BobKerr).

John Ams

John G. Ams, J.D., is the Executive Vice President and Chief Operating Officer of the National Society of Accountants in Alexandria, VA. He has over 40 years of experience in the federal tax arena with expertise providing legislative and regulatory representation in accounting and federal tax matters to a variety of constituencies including individuals, non-profit organizations, and corporations. At NSA, a professional society whose members are professionals in the areas of accounting and taxation, he is responsible for all operations and provides information, education and guidance to his membership regarding tax legislation, tax and accounting regulations, and administrative concerns. He has presented testimony to IRS and Congress on numerous occasions and served as a member of the IRS Advisory Council from 2012-14, where he was the 2014 chair of the Professional Responsibility Subgroup. Mr. Ams is a Certified Association Executive, a member of the D.C Bar Association, and a member of Phi Beta Kappa. He holds a J.D. from the Georgetown University Law Center and a BA, magna cum laude, from Michigan State University, East Lansing, MI.

Panel 3

Rick Parrish

Based in Washington, DC, Rick serves government Customer Experience Professionals. Rick's research helps governments overcome the unique challenges they face in developing successful and innovative customer experiences for the people they serve.

Rick has over 14 years of experience in government analysis. He was previously an analyst at the Central Intelligence Agency, where he helped pioneer high-profile improvements in the CIA's customer focus and gained an appreciation for the unique hurdles governments face in such efforts. He also earned awards for his rigorous, influential analysis and engagement with a range of senior officials. Prior to his government service, Rick was a professor of political science at Loyola University New Orleans and West Texas A&M University (WTAMU) and director of the political science graduate program at WTAMU.

Rick holds a Ph.D. in political science from the University of Wisconsin-Madison, where he focused on international relations and political theory.

Tina Orem

Tina Orem is a tax writer at NerdWallet, a personal finance website that helps consumers make the best financial decisions. Prior to NerdWallet, Tina was a business writer and editor for more than 10 years. Tina also has a background in corporate finance, where she focused on driving efficiency and profitability for multiple companies.

John Sapp

John Sapp has served in key positions at Drake Software since 1996, ranging from Chief Financial Officer to Vice President of Drake's Sales, Marketing and Education Divisions. Today he is Vice President of Strategic Development, where his role is to help shape the future and growth of the company. As a CPA, he has considerable experience in public accounting, as well as technological and private industries. He holds a bachelor's degree in Accounting from Oral Roberts University, and has been a Certified Public Accountant since 1987. John also currently serves on the CERCA Board, completing his two year term as Chairman.   Drake Software, of Franklin, NC, is one of the largest professional tax preparation and electronic filing companies in the country. Drake has participated in the IRS e-file program every year since its inception in 1986, and last year facilitated the acceptance of millions of federal and state electronic returns. The Drake Software tax package has been commercially available since 1978 and is currently used in more than 50,000 independent tax offices.

The Council for Electronic Revenue Communication Advancement (CERCA) was founded in 1994 at the direct request of the Internal Revenue Service in order to provide a forum and a liaison point between the agency and industry (and others) to assist in building electronic filing and advanced electronic tax administration. CERCA members served as a partner with IRS during the phenomenal growth of E-File, and that and related work continues today. CERCA members include a wide diversity of industry participants. In recent years, CERCA has worked with IRS and the Department of Health and Human Services in facilitating the implementation of the Affordable Care Act's taxpayer related issues. CERCA has worked with IRS on the development of various key online service initiatives for many years, and has been proud to play a leading role in Commissioner Koskinen's landmark Security Summit.