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IRS News Release

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MEMBERS SELECTED FOR NEW IRS TAX EXEMPT ADVISORY COMMITTEE

WASHINGTON – The Internal Revenue Service today announced the selection of the 18 members of the first Tax Exempt/Government Entities Advisory Committee (TEAC). The group will serve as an organized public forum for the IRS and representatives who deal with employee plans, exempt organizations, tax-exempt bonds, and federal, state, local and Indian tribal governments. The TEAC will allow the IRS to receive regular input on administrative policy and programs affecting these customer groups.

"This group is one more way we will be able to get valuable public input on tax administration issues," said IRS Commissioner Charles O. Rossotti. "We believe the TEAC will be an important pipeline between these customers and the IRS."

Members of the TEAC are appointed by the Secretary of the Treasury and serve two-year terms.

"The TEAC members were chosen with a view to balance representation from our diverse customer groups," said Evelyn Petschek, Commissioner of the Tax Exempt and Government Entities (TE/GE) division of the IRS. "We look forward to working with them on the challenging issues affecting the tax exempt and government entities community."

The new TEAC members are:

Employee Plans

- Brian L. Anderson of Madison, WI. Anderson, an attorney and CPA, is a shareholder of the Madison law firm DeWitt Ross & Stevens S.C. He currently is the Chair of the IRS Great Lakes Area TE/GE Council, Chair of the Employee Benefits Committee of the Business Law Section of the State Bar of Wisconsin, and a member of the Federal Taxation committee of the Wisconsin Institute of Certified Public Accountants. Anderson is primarily involved with small and mid-sized employer groups.

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- Mary Beth Braitman of Indianapolis, IN. Braitman is a partner in the law firm of Ice Miller, where her clients include various governmental retirement systems in Indiana, Iowa, Kansas, Massachusetts, Montana, New York, Ohio, Oklahoma, Texas and Washington. She has worked extensively in pension and employment tax issues of state and local governments, Social Security coverage issues, and tax sheltered annuity programs in the kindergarten–grade 12 and university sectors.

- Jonathan Barry Forman of Norman, OK. Forman, Professor of Law at the University of Oklahoma, teaches courses on income taxation of corporations and individuals, pension and employee benefit plans, tax policy, procedures and welfare law. He has written extensively on tax and pension policy. He was a delegate to the National Summit on Retirement Savings, was a trial attorney with the Department of Justice and is a trustee of the American Tax Policy Institute.

- Craig Hoffman of Jacksonville, FL. Hoffman is the current President-Elect of the American Society of Pension Actuaries, where he has also served as a member of the Board of Directors and Vice President, as well as the Co-Chair of the Government Affairs Committee. Hoffman, who serves on the editorial boards of several pension journals, is Vice President and General Counsel of SunGard Corbel, and was an expert speaker at the National Summit on Retirement Savings.

- John W. Schroeder of Santa Clara, CA. Senior Tax Benefits Counsel for Intel Corporation, Schroeder was a founding director of the Silicon Valley Benefits and Compensation Association. He has been active in the past in the Western Pension and Benefits Conference and the American Corporate Counsel Association. He has a large plan sponsor perspective as well as prior experience as counsel to a third party administrator of small plans.

- Donald J. Segal of New York, NY. Segal is Senior Vice President and Actuary with The Segal Company. He currently serves as the Chair of the American Academy of Actuaries Pension Committee. He is the former Chair of the Pension Section Council of the Society of Actuaries and also serves on the Board of Governors of the Society of Actuaries.

Exempt Organizations

- Victoria B. Bjorklund of New York, NY. Bjorklund is a partner in the law firm of Simpson, Thacher and Bartlett in New York, where her clients include educational organizations, tax-exempt health care organizations and private foundations involved in substantial domestic and international grant-making activities. She is a long-time active participant in the American Bar Association and is the incoming Chair of the ABA Section on Taxation – Exempt Organizations Committee.

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- Deirdre Dessingue of Washington, DC. Dessingue is the Associate General Counsel of the United States Catholic Conference in Washington, DC, and Co-Chair of the Religious Organizations Subcommittee of the American Bar Association Section on Taxation - Exempt Organizations Committee. She has particular expertise in the areas of prohibitions on political campaign activity, fund-raising limitations and religious organizations.

- Karl E. Emerson of Harrisburg, PA. Emerson is the Director of the Pennsylvania Bureau of Charitable Organizations, the state office charged with enforcement of the law that regulates organizations soliciting charitable contributions in Pennsylvania. He is also the Immediate-Past President of the National Association of State Charity Officials and Ex Officio member of the NASCO Board.

- Sara E. Meléndez of Washington, DC. Dr. Meléndez is the President and CEO of Independent Sector, a nonprofit, nonpartisan coalition of more than 700 national nonprofit organizations, foundations and corporate philanthropy programs, collectively representing tens of thousands of charitable groups in every state. Through research and public policy work, Independent Sector works to accomplish its mission of strengthening the nonprofit and philanthropic community to foster private initiative for the public good.

- Elizabeth D. Nunnally of Minneapolis, MN. Nunnally is Chief Financial Officer of the Academic Health Center at the University of Minnesota and formerly the Director of Taxation and Debt Management at the University. She is a CPA and a member of the Taxation Council of the National Association of College and University Business Officers (NACUBO).

- John Von Kannon of Washington, DC. Von Kannon is the Vice President and Treasurer of The Heritage Foundation, a public policy organization based in Washington, DC. In this position, he has responsibility for matters relating to the finances and taxation of that organization. As head of the foundation's Development Department, Mr. Von Kannon oversees its education and marketing programs.

Government Entities: Federal, State and Local Governments

- Daryl Dunagan of Frankfort, KY. Dunagan is the Program Manager of the Division of Social Security for the Kentucky Controller's Office. He has more than 25 years experience with Social Security coverage, employment taxes and information return reporting for state and local governments and is a past President of the National Conference of State Social Security Administrators. He currently chairs its Government Affairs Committee.

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- Don F. Waugh of Raleigh, NC. Waugh is the Assistant State Controller of North Carolina. He has held various positions in state government since 1975 and has been actively involved in the formation and operations of the Controller's Office. He is a member of the Government Finance Officers Association and the National Association of State Auditors, Controllers and Treasurers.

Government Entities: Indian Tribal Governments

- Jayne Fawcett of Uncasville, CT. Fawcett currently serves as Treasurer and Board Member of the United South and Eastern Tribes, Inc. (USET). She has over 20 years of tribal government experience including elected service as the Vice Chair of the Mohegan Tribe of Connecticut. She currently holds the position of Tribal Ambassador for the Mohegan Tribe.

- David Mullon of Tahlequah, OK. Mullon is currently Associate General Counsel of the Cherokee Nation. He has extensive experience in tribal government tax and administration issues, particularly those unique to Oklahoma. Mullon previously served as Attorney General of the Muscogee (Creek) Nation and was in private practice for several years in Tulsa, OK.

Government Entities: Tax Exempt Bonds

- Terence P. Burke of Dallas, TX. Burke is President of the Investment Management Division of First Southwest Asset Management, Inc., the investment advisory affiliate of First Southwest Company. Burke specializes in arbitrage compliance and the investment of public funds. He is a Certified Public Accountant and serves as advisor to the Government Finance Officers Association Debt and Fiscal Policy Committee.

- Perry E. Israel of Sacramento, CA. Israel is a partner in the Tax and Public Finance Department of Orrick, Herrington & Sutcliffe, L.L.P. He specializes in tax-exempt financing, tax-exempt organizations, low-income housing tax credits and mortgage credit certificates. Israel is an active member of both the Committee on Tax-exempt Financing of the American Bar Association Section on Taxation and the National Association of Bond Lawyers. He served as a board member of NABL from 1993 to 1995 and Secretary from 1994 to 1995.

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