

IRS News Release

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IRS Names 10 New Members to the Advisory Committee on Tax Exempt and Government Entities

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WASHINGTON — The Internal Revenue Service today announced the selection of 10 new members to the Advisory Committee on Tax Exempt and Government Entities (ACT). The ACT consists of external stakeholders and representatives who deal with employee retirement plans, tax-exempt organizations, tax-exempt bonds and federal, state, local and Indian tribal governments.

“ACT members provide valuable feedback and insight on a wide variety of issues related to tax exempt and government entities,” IRS Commissioner Doug Shulman said.

The ACT meets periodically and will submit a report to the agency on June 15 at a public meeting. ACT members generally serve a two-year term with a possible one-year extension. The 10 new participants join 11 returning members.

The new members are:

Employee Plans

Stephen L. Ferszt, Tarter Krinsky & Drogan LLP, New York, N.Y. Ferszt is chair of the Employee Benefits and Executive Compensation Group at his firm. He counsels clients ranging from Fortune 100 companies to small employers on all aspects of qualified retirement plans (defined contribution and defined benefit). He also counsels tax-exempt organizations on issues of public charities and private foundations. Ferszt served as Chair of the Employee Benefits Committee of the New Jersey Bar Association and is a member of the IRS Northeast Pension Liaison Group.

Joan E. McCabe, Actuarial Designs & Solutions, Inc., Scarborough, Maine. McCabe is owner and managing partner of an independent actuarial consulting and retirement plan administration firm. She serves as a consulting actuary to private, small and medium sized businesses. She performs plan design and consulting services for defined and cash balance plans, 401(k) profit-sharing, nonqualified executive retirement plans and retiree medical plans and has experience with retirement plan sponsors. McCabe is an Enrolled Actuary and Associate in the Society of Actuaries.

Exempt Organizations

Eric B. Carriker, Massachusetts Department of the Attorney General, Boston. Carriker is an assistant attorney general and the senior litigation manager in the Non-Profit Organizations/Public Charity Division of the office of the Attorney General. He conducts and supervises investigations and litigation covering a broad spectrum of issues connected with the Attorney General's oversight of charities. He is a board member of the National Association of State Charity Officials (NASCO) and previously served as NASCO president.

Marty Martin, Marty Martin Law Firm, Raleigh, N.C. Martin focuses his legal and consulting practice on all aspects of an exempt organization's life cycle, including start up, operations and management, board governance, merger, bankruptcy and closing. In addition to his Juris Doctor degree, he received a master's in public administration with concentration in internal management of non-profit/public sector organizations and networks. Martin is an instructor for the Duke University Nonprofit Management Intensive and Advanced Certificate in Nonprofit Leadership programs and is affiliated with North Carolina State University's Institute for Nonprofits.

Government Entities – Federal, State and Local Governments

Lisa M. Pusich, State of Alaska, Juneau. Pusich is the State Accountant for the State of Alaska. She is the state liaison with the IRS for all tax matters, including return filing and overall tax compliance. She oversees the accounting services and payroll section for the state and is directly involved in implementing new tax provisions such as IRC 3402(t). She is responsible for addressing a myriad of technical tax law issues that affect withholding and information reporting. Pusich is a member of the AICPA, Association of Government Accountants and the National Association of State Auditors, Controllers and Treasurers.

Kathy Sheppard, Commonwealth of Massachusetts, Office of the Comptroller, Boston. Sheppard is Deputy Comptroller for the Commonwealth of Massachusetts. She is responsible for the tax reporting and compliance issues for all government entities in the commonwealth and works directly with the IRS to address and resolve various tax matters. Sheppard is responsible for implementation and direction of the state accounting and payroll system for all departments within the state. She serves on the Lieutenant Governor's Task Force on the Prevention of Fraud, Waste and Abuse. Sheppard is a member of the National Association of State Auditors, Controllers and Treasurers.

Robert E. Jaros, Deputy State Controller, Boulder, Colo. Jaros is Deputy Controller for the State of Colorado. He is responsible for addressing technical tax law issues, implementing new legislative provisions such as 3402(t), reporting and analysis, payroll, accounting and recovery audits, and has worked with FSLG to address various technical tax issues. He serves as part-time accounting instructor at the Metropolitan State College in Denver. Jaros received the Community Engagement Award from the Center for Urban Connections and is a member of the AICPA, the National Association of State Auditors, Controllers and Treasurers and the Colorado Bar Association.

Government Entities – Tax Exempt Bonds

Sue Painter, Providence Health & Services, Seattle. Painter is System Director and Chief Investment Officer/Treasurer of her firm, a multistate not-for-profit health care system with revenues in excess of \$8 billion. She is responsible for the issuance of over \$3 billion in debt financing. Previously, she served as Treasurer of the Public Utility District of Clark County and was responsible for the debt issuance of a local government issuer. Painter previously served as an investment executive with a major investment bank.

Government Entities – Indian Tribal Governments

William “Yaan Yaan Eesh” Micklin, Ewiiapaayp Band of Kumeyaay Indians, Alpine, Calif. Micklin is 1st Vice President for the Central Council of Tlingit & Haida Indian Tribes of Alaska, and represents over 28,000 tribal citizens. He is Chief Executive Officer of the Ewiiapaayp Band of Kumeyaay Indians, Executive Director of the California Association of Tribal Governments, and a member of the Alaska Native Brotherhood Camp 14 in Ketchikan. He served as a member of the FCC Inter-governmental Advisory Committee and the Department of Interior Tribal Energy Policy Advisory Committee.

Holly Easterling, Chickasaw Nation, Ada, Okla. Easterling is Administrator of Planning and Organizational Development working directly with Governor Anoatubby to ensure that the financial and strategic needs of the Chickasaw Nation are realized. She served as an elected official in the Chickasaw legislature, including serving as Chair of the legislature and Chair of the Finance Committee. She served as Controller for Chickasaw Enterprises, the business division of the Chickasaw Nation.

ACT Members Continuing on the Committee

Employee Plans

Barbara A. Clark, University of California, Oakland.

Kathryn J. Kennedy, John Marshall Law School, Chicago.

David Levine, Groom Law Group, Chartered, Washington, D.C.

Adam Pozek, DWC Consultants, Essex, Mass.

Exempt Organizations

J. Daniel Gary, General Council on Finance and Administration, United Methodist Church, Nashville.

James P. Joseph, Arnold & Porter LLP, Washington, D.C.

Karen Gries, Larson Allen LLP, Arlington, Va.

Celia Roady, Morgan, Lewis & Bockius LLP, Washington, D.C.

Government Entities: Indian Tribal Governments

Wendy S. Pearson, Of Counsel, Bennett, Bigelow, & Leedom, P.S., Seattle.

Government Entities: Tax-Exempt Bonds

David Cholst, Chapman and Cutler LLP, Chicago.

George T. Magnatta, Saul Ewing LLP, Philadelphia.

ACT Public Meeting

The ACT's public meeting will be held from 9:30 a.m. to 12:30 p.m. EDT on June 15 at the IRS headquarters, 1111 Constitution Avenue NW, Washington, D.C.