

IRS News Release

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Washington, D.C.

Media Contact: 202.317.4000

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IRS Names Seven New Members to ACT Advisory Panel; ACT will Submit Recommendations at June Meeting

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WASHINGTON— The Internal Revenue Service today announced the appointment of seven new members of the Advisory Committee on Tax Exempt and Government Entities (ACT), which will present reports and recommendations to senior IRS executives at its next public meeting on June 17.

ACT includes external stakeholders and representatives who deal with employee retirement plans; tax-exempt organizations; tax-exempt bonds; federal, state, local and Indian tribal governments.

ACT members are appointed by the Secretary of the Treasury. The new members will begin two-year terms and join 14 returning members. ACT advises the IRS on operational policy and procedural improvements.

ACT was established under the Federal Advisory Committee Act to provide an organized public forum for discussion of relevant issues affecting the tax exempt and government entities communities. At the public meeting, five ACT project teams will present reports that include recommendations pertaining to the following areas:

- **Employee Plans:** Analysis and Recommendations Regarding 403 (b) Plans
- **Exempt Organizations:** The Redesigned Form 990 - Recommendations for Improving its Effectiveness as a Reporting Tool and Source of Data for the Exempt Organization Community
- **Federal, State and Local Governments:** FSLG Education and Outreach -Review and Recommendations
- **Indian Tribal Governments:** Recommendations for Outreach and Training - A Revision to the Indian Tax Desk Guide
- **Tax Exempt Bonds:** Doing More With Less – Balancing Resources and Needs

The public meeting is scheduled to begin at 9:30 a.m. ET on June 17, at IRS headquarters. The address is 1111 Constitution Ave. NW, Washington, D.C. 20224. Reports presented will be available on IRS.gov.

Due to limited seating and security requirements, members of the public interested in attending the meeting should call Brian Dowling to confirm their attendance at 202-317-8798, (not a toll-free call) or email their request to tege.advisory@irs.gov. Attendees must have photo identification and are encouraged to arrive at least 30 minutes before the session begins.

The seven new members of the ACT are listed below and grouped by their relevant project team:

Employee Plans

Susan Bernstein, New York

Bernstein has been special counsel at Schulte, Roth & Zabel LLC, a New York law firm, for over 20 years. She has worked with defined benefit; defined contribution, non-qualified and welfare benefit plans. Her clients include single, multiple and multi-employer plans as well as church plans and plans of not-for-profit organizations. She has written numerous articles on retirement plans in addition to being a frequent speaker on employee benefit topics. Bernstein has her Juris Doctorate from the Benjamin N. Cardozo School of Law and is a member of the New York Bar.

Judith Boyette, San Francisco

Boyette is a partner in Hanson Bridgett LLP, a San Francisco law firm, and is head of the firm's Employee Benefits Group. Prior to joining her law firm, she spent more than 10 ten years at the University of California as the Associate Vice President of Human Resources and Employee Benefits. Her clients include single employer plans, 403(b) plans, church plans and governmental plans. Boyette has her Juris Doctorate from the Hastings College of the Law and is a member of the California Bar.

Exempt Organizations

Natasha Cavanaugh, Seattle

Cavanaugh is a tax attorney for the Bill & Melinda Gates Foundation. She also served as lead tax attorney at a major public research university, where she managed complex tax matters, including the university's medical resident FICA tax refund claim. She has broad experience in private practice and specifically mentioned representing governmental entities. Ms. Cavanaugh has a JD, University of Virginia; MA, Sociology and a BA, Economics, Stanford University.

Cindy Lott, New York

Lott is the executive director and senior counsel of the National State Attorneys General Program at Columbia University Law School. She also leads the Columbia Law School Charities Project. Ms. Lott has a JD, Yale Law School; BA, Indiana University. She was chief counsel and deputy general counsel for the DNC on two occasions (2000 and 2004).

Government Entities – Indian Tribal Governments

Marcelino Gomez, Phoenix

Gomez served as the Assistant Attorney General (Tax and Finance) at the Navajo tax department for 26 years and now is Assistant General Counsel at the Salt River Pima-Maricopa Indian Community. Mr. Gomez received his BBA in Accounting from New Mexico State University and his JD from the University of Texas School of Law. He is a member of the

Navajo Nation Bar Association, the ABA Tax Section, and is a USSF Soccer referee and instructor.

Government Entities – Tax Exempt Bonds

David Danenfelzer, Austin

Danenfelzer is a manager of development finance for Texas State Affordable Housing Corporation. He manages multifamily bond finance programs, direct lending programs and the Affordable Communities of Texas land trust program. He is responsible for developing policies, marketing materials, underwriting and managing program staff. Danenfelzer graduated from the University of Texas at Austin, earning his MSCRP in Historic Preservation and Community Development and received a BS in History and Latin American Studies from University of Wisconsin at Madison.

William Johnson, Dallas

Johnson is the Senior Vice President for First Southwest. He is responsible for managing, mentoring and strategic planning for 22 rebate professionals. Client relationship responsibility includes rebate liability planning and implementation of tax changes for tax-exempt bond clients. He is responsible for developing and implementing the current internal arbitrage compliance and maintains a list of arbitrage clients from state and local governments. Johnson earned his Bachelors Degree, business administration in accounting from Southern Methodist University and a Masters of Science Degree in accounting from Texas Tech University. He is a member of the AICPA, Texas Society of CPAs and is a licensed CPA in Texas.

ACT Members Continuing on the Committee in 2015

Employee Plans

Alison Cohen, Ferenczy Benefits Law Center, Atlanta.
Stuart A. Sirkin, The Segal Company, Washington, D.C.
Christopher W. Shankle, Capitol One, Shreveport, La.
Matthew I. Whitehorn, Dilworth Paxton, Philadelphia.

Exempt Organizations

Virginia Gross, Polsinelli PC, Kansas City, Mo.
David Moja, Capin Crouse LLP, Orlando, Fla.
Amy Coates Madsen, The Excellence Institute, Baltimore
Andrew Watt, Association of Fundraising Professionals, Arlington, Va.

Federal, State and Local Governments

David P. Augustine, City/County of San Francisco, San Francisco.
Dean J. Conder, State of Colorado, Denver.
Vandee V. DeVore, State of Missouri, Jefferson City, Mo.

Indian Tribal Governments

Stefani A. Dalrymple, Yukon Accounting & Consulting, Fairbanks, Alaska.
Tino Batt, Shoshone-Bannock Tribes, Fort Hall, Idaho

Tax Exempt Bonds

Floyd Newton III, King & Spalding, Atlanta

