



2004 Meeting Minutes Area 6

- September 20, 2004
- May 17, 2004
- March 15, 2004
- February 23, 2004
- January 15, 2004

Area 6 Committee Meeting Minutes Taxpayer Advocacy Panel Area 6 Teleconference September 20, 2004

Attendance

- Jim Banks
- Mario Burgos, Vice Chair
- Skip Eshelman
- Greg Maciulla
- Thomas Sherwood, Designated Federal Official
- Virginia Symonds
- Bruce Twomley
- Sherry Whah, Chair

Staff

- Judi Nicholas, Program Manager
- Marla Ofilas, Note Taker

Welcome/Announcements/Review Agenda

Mario welcomed everyone and reviewed the agenda and added a number of additional topics.

Roll Call

Roll call was taken and a quorum was met.

Area 6 Annual Assessment

Jim has received assessments from all but three members who committed to sending them in the next 48 hours. Jim will forward the consolidated responses to Sherry. Sherry began drafting the document which she shared via e-mail just before the start of the conference call. Sherry will complete the draft, incorporating the consolidated information from Jim and share the draft with the committee members for review and comment.

There are three reports from the TAP database that can be used to identify the issues to be included in the annual report. The reports include active issues, elevated issues and issues that were dropped by the committee. It was decided to include the total number of issues reviewed, total number elevated and total number dropped.



Action: Judi will provide Sherry with a list of issues and their descriptions.

Action: Judi will provide Sherry with the number of issues and the disposition of the issues.

Disappointments:

The committee provided comments on the disappointments to be included in the annual assessment.

- No issues from Montana to work
- Received legislative issues that were out of the TAP scope
- Slow response from IRS
- Lack of communication from the Joint Committee to the panel members
- Lack of involvement from some Local Taxpayer Advocates
- The inability use of TAP speak
- Slow pace, in general, at which things move

Mario added that when the committee prepares the disappointment portion of the self assessment report, the committee includes examples that would illustrate and support the disappointments.

As a result of a discussion about LTA expectations, Virginia stated she wasn't sure what to expect from the LTA and found it difficult to decide if she received adequate support. Joe stated that he hasn't been contacted by the LTA in his area as well. Judi shared that the LTA's would soon be receiving a document called, "Taxpayer Advocacy Panel Outreach Guidelines for LTA's Assistance" which consist of guidelines, expectations and responsibilities. Once the guidance document is shared with the LTAs, the committee members will receive a copy. Judi stated that although TAS is aware of the problem, the committee should still include the issue as a disappointment in the self assessment.

Decision: The committee felt there was uneven involvement with the LTA's. The committee will thank the states that provided support and express their desire for additional support from other states.

Decision: The committee will add "Receive Issue Matrix - Quarterly" under staff support in the annual assessment report.

Accomplishments:

The committee discussed their accomplishments during the past year.

- Work well together as a group
- Responding to taxpayers
- Various elevated issues

Outreach Activities:

Sherry asked that the committee send their outreach activities to her for inclusion in the assessment. She felt this would help give other members ideas about what they can do for outreach.

Virginia asked if there was a form available to keep track of outreach activities. There is a "Monthly Speaker Report" that can be used to record the outreach event. The report keeps track of types of outreach, location and number of participants.

Decision: The committee decided to add "Receive Speaker Report - Monthly" under staff support in the self assessment report.



Virginia asked if there was a way to have a set of objectives for the upcoming year so the committee could better evaluate its success. Judi offered that the committee was free to set goals and objectives for the coming year.

Decision: The committee decided to add setting objectives for 2005 the self assessment under as something they would like to start doing.

Action: Jim and Sherry will consolidate all the information received from the committee members. Sherry will provide a final draft to the committee. The committee will submit comments via email and Sherry will submit the report to the Joint Committee by October 15th.

Marketing Strategy

Sherry emailed to the committee a listing of potential groups for Alaska outreach and the website she used to generate the list. The site in question could be used by any member wanting to identify possible outreach venues within their respective states.

Decision: The information and web site will be forwarded to the Ad Hoc committee as requested.

Final Notice of Levy

Bruce reviewed an issue that he brought forth to the committee in June; when someone receives a Final Notice of Levy, include a reference on the notice regarding the Taxpayer Advocate Service.

Decision: The committee unanimously agreed that Bruce would write up the recommendation to elevate it to the Joint Committee.

Closing

Sherry asked if there were any additional comments and hearing none, the call was adjourned.



**Area 6 Committee Meeting Minutes
Taxpayer Advocacy Panel
Area 6 Teleconference
May 17, 2004 2:00pm (Pacific Time)**

Attendance

Clayton Agena
Mario Burgos
Chris Forzano
Darlene Bramon
Joe Reder
Sherry Whah
Judi Nicholas, Acting Designated Federal Official

Staff

Marla Ofilas, note taker

Roll Call

Marla took roll and a quorum was met. Before the committee reviewed the issues, Jim asked for clarification regarding the face-to-face meeting in Portland. Judi confirmed that the meeting will be half day on June 18th and a full day on June 19th. The hotel was unable to accommodate the original schedule so in return the hotel provided the meeting rooms and lodging rooms at a reduced cost.

Review Issues

Issue #2769 – Name on Direct Deposit Account

Virginia Symonds was unavailable to provide an update. The committee decided to put this issue on hold.

Issue #1775 – Processing of Multiple Year Returns

Action: Judi will contact Bruce Twomely to get a hard copy of the report to elevate it to Joint Committee for the June meeting. Judi also asked the committee to send all documents to her via email while Anne is out of the office.

Issue#2836 – Broker Providing Basis in Assets

Clayton reviewed the issue with the committee. The taxpayer is concerned that he is required to file a tax return when he sells stocks or bonds when he would otherwise not have a filing requirement. Judi explained to the committee when a broker reports the sale to the IRS, the IRS does not know if the taxpayer has any additional taxes to report nor what the gain or loss is. It is the taxpayers' responsibility to file a tax return even if there is no income to report or if they are below the income threshold.

Recommendation: Clayton recommended the committee not pursue the issue. The committee agreed to refer the taxpayer to a Taxpayer Assistance Center (TAC) or the VITA program for help. In addition, the committee recommended the taxpayer to review Publication17 that defines who is required to file.

Action: A closing letter will be sent to the taxpayer.

Around the Area

Darlene Bramon explained that the attorney group that raised the universal POA issue has been given the IRS contact name as a resource. It will be up to them to contact the IRS and let the committee know if they would like to continue pursuing the issue.



Sherry explained that the IRS just released a new directive that the form 2848 is used only for representation and no other reason. For example, CPA's, Enrolled Agent, or Lawyers may represent their taxpayer in audit, collection matters, or non-filing issues. But individuals not listed will not be able to receive the same information as those who are able to practice before the IRS. The only information they would be able to receive from the IRS is a taxpayer information form. The IRS will only provide information but not allow the individual to represent the taxpayer.

Judi explained to the committee that these are two separate issues. The first issue was raised by a group of attorneys who want a universal power of attorney and they are working directly with the IRS person that has the expertise in this area. The second issue is an IRS ruling that states the 2848 may only be signed or accepted by certain individuals. Judi suggested that this could be a potential new issue for the committee.

Jim Banks offered to write up the issue for possible action by the committee

Action: Judi will forward the IRS directive to Jim to assist in developing the issue.

Each member provided an update of outreaches attended or classes that were taught where TAP was discussed. Jim Banks stated that Montana has a new LTA and feels they will be more helpful.

Face-to-Face meeting – Portland

Identify possible new issues to work:

Judi suggested to the committee to come up with possible issues before the face-to-face meeting. Judi didn't feel that it would be justifiable for the committee to have a face-to-face meeting with only one issue to work. Identifying new issues now will give the staff time to research the issues to provide the committee with information necessary to decide whether they want to work a particular issue.

The committee discussed additional issues that could be worked.

1. Statute of limitation for refunds and the applications of those monies.
2. There is no present system in the IRS that would trigger the IRS to look for an Form 706 Estate Tax return upon the death of a taxpayer. The lack of a review system makes it possible for an estate to fail to file a return and the IRS would not know it was due or missing.
3. When the IRS creates a new form, the IRS should, at the same time, create an electronic version of the same form. Currently this is not the practice.
4. What are the cost savings of having taxpayers e-filing, where are the cost savings being realized and how is the money being reused in the IRS?
5. Earned Income Tax Credit issues to be forwarded from the EITC issue committee by Jim Banks.

Action: Jim will forward Judi an email describing what the two issues are that's being suggested.

Action: Judi will send out an email to Area 6 members soliciting for additional issues to be researched prior to the face-to-face meeting.

Joint Committee Meeting

Mario explained that during the Joint Committee meeting the TAP Director was soliciting for members to participate in interviews of prospective new panel members. **Action: Judi will forward an email to the committee members inviting them to volunteer.**

Judi explained that the 1st round of interviews will start during the last week of June and continue through the end of July. The email will provide the details.

Mario asked Judi if a press release would be sent out announcing the meeting in Portland. Mario hoped that the public will provide input to the issues that would be worked.



Mario asked the committee if there were any additional comments. There were no additional comments and Mario adjourned the meeting.

Next meeting June 18th and 19th 2004 in Portland, Oregon



Area 6 Committee Meeting Minutes
March 15, 2004
2:00 pm PST

Members in Attendance:

- Clayton Agena / HI
- Jim Banks / MT
- Larry Barnard / ID
- Darlene Bramon / ID
- Mario Burgos / NM
- Chris Forzano / WA
- Gregory Maciulla / AZ
- Sharon Stetz / UT
- Virginia Symonds / OR
- Bruce Twomley / AK
- Sherry Whah / AK
- Judi Nicholas, acting Designated Federal Official

Members Absent:

- Skip Eshelman / WY
- Joe Reder / WA
- Tom Sherwood / Designated Federal Official

TAP Staff:

- Anne Gruber

Opening

Mario opened the meeting at 2:00 o'clock. Sherry welcomed everyone and Mario reviewed the agenda. He then asked if there were any other items to be included.

No one replied, so the agenda was taken as is.

Roll Call

Judi Nicholas took the roll call and there were enough members for a quorum.

Referrals

Alaska, Request for tax returns by IRS, #2496

Bruce and Sherry re-wrote this elevated issue and the original and revised versions were e-mailed to the committee by Anne. All committee members will review the documents and provide comments to Anne by the end of the week. **ACTION ITEM: Anne will collect comments for Bruce.**

Alaska, Forms in TAC Office, #2722

Sherry explained the problem and suggested a response to the taxpayer by telling her about the other ways to get tax forms. The locations of forms in each building are likely a space issue, but could also be a security issue for the forms. The taxpayer has the choice of obtaining forms by fax, telephone, the Internet, as well as coming to the office. **ACTION ITEM: Anne will write such a closing letter.**



Hawaii, Adoption Credit #2664

Clayton explained the problem and that it wasn't information readily known to the analyst who answered the phone. The taxpayer was upset because he had no way of knowing the adopted child's SSN or name prior to the adoption. Anne contacted the taxpayer and provided him with instructions on how to deal with this issue, which solved the taxpayer's problem. **ACTION ITEM: Anne will write a thank you letter if she can obtain taxpayer contact information.**

Montana, Ex's proof in audit, #2567

Jim felt that it was not unreasonable to ask a taxpayer for proof for a deduction that was being claimed. He said not only is the request reasonable, it is also standard operating procedure. The taxpayer's main reason for the call seemed to be to get someone to intercede on her behalf. It is not in the scope of the Panel to look into personal problems of taxpayers. Her thank you letter should include a publication that explains what type of proof should be sent. We should provide her with a variety of recourses. **ACTION ITEM: Anne will prepare the thank you letter.**

Montana, Employee Benefits, #2527

Jim deferred to the IRS response in this case. The IRS' claim that it would be an unnecessary burden to the small business owner seems legitimate. He's not sure if it is legislative, but if the IRS says so, it is not worth pursuing. It is ultimately the responsibility of the employee. The benefit does not outweigh the gain in this instance.

Oregon, Native American Names, #2581

Virginia felt that she should call the taxpayer, see if he was close to a TAS office, and refer him to them. Also a thank you letter should be written for bringing this issue to our attention. **ACTION ITEM: Virginia will make the call and Anne will write the letter.**

Oregon, Direct Deposit, #2769

Since the taxpayer left no contact information, we cannot let her know of our decision, but we think that there should be a statement in many of the instructions that clarifies what happens when someone puts a refund into someone else's account. I.e. it won't work. This bit of information needs to go in many places where a taxpayer would see it, such as the 1040 instructions, Pub. 17, with the free file information, etc. **ACTION ITEM: Virginia will elevate this issue.**

Washington, Community Profit, #2614

Chris explained this issue. There is a national association of non-profits that might wish to comment on this issue. Sharon and Mario, who are both involved in non-profits say that it doesn't matter what the name is, it still doesn't make it any easier to raise funds. A letter should be written suggesting that she take it through a national non-profit association. **ACTION ITEM: Anne will write the letter.**

Around the Area

Mario gave the members the opportunity to share their outreach activities since the last meeting.

Clayton Agena, Hawaii, did one on one outreach and will print an article in the trade association monthly newsletter.

Jim Banks, Montana, performed outreach on a daily basis, mostly one on one with his clients.

Larry Barnard, Idaho, passes out TAP mementoes wherever people are interested.

Darlene Bramon, Idaho, just returned from national headquarters of another association and talked to those involved about TAP.



Mario Burgos, New Mexico, is still working with his LTA and attempting to get on a local radio talk show on April 15th during the morning commute. Mario's web site has a link to TAP.

Greg Maciulla, Arizona, is still working on his literacy project but feels that fewer and fewer people are interested.

Chris Forzano, Washington, performed one on one outreach as well as at the Sons of Italy organization.

Bruce Twomley, Alaska, is still attempting to get together with his LTA regarding putting information about TAS in the final notice.

Sherry Whah, Alaska, talks about TAP as she is teaching classes.

Closing

Judi adjourned the meeting.



**Area 6 Committee Meeting Minutes
February 23, 2004
2:00 pm PST**

Members in Attendance:

- Clayton Agena / HI
- Mario Burgos / NM
- Skip Eshelman / WY
- Chris Forzano / WA
- Gregory Maciulla / AZ
- Sharon Stetz / UT
- Virginia Symonds / OR
- Bruce Twomley / AK
- Sherry Whah / AK
- Tom Sherwood / Designated Federal Official

Members Absent:

- Jim Banks / MT
- Larry Barnard / ID
- Darlene Bramon / ID
- Joe Reder / WA

TAP Staff:

- Judi Nicholas
- Anne Gruber

Guests:

- Susan Leatherman
- Rebecca Johnson

Opening

Sherry Whah opened the meeting at 2:00 o'clock . Sherry welcomed everyone and Mario reviewed the agenda. Mario then asked if there were any other items to be included. Tom mentioned that he had asked three of his staff members who had knowledge in some of today's topics to attend with him to answer questions if needed.

Roll Call

Judi Nicholas took the roll call and there were enough members for a quorum.

Susan Leatherman and Rebecca Johnson

Susan was invited to discuss the non-filer notice program. She explained that the non-filer process for the individual with small businesses and small businesses began with a notice that is sent out after the last extension date in October of each year. There is an inventory of taxpayers who are typically non filers. The IRS matches W-2 from the employer with returns that are filed by the employee. There is a large compliance file created that is used to send notices to potential non-filers. The number of notices sent is dependent upon a number of factors including enough staff must to answer the resulting incoming telephone calls. The compliance file in made up of taxpayers who were delinquent last year,



anyone with at least \$200 due, and the self-employed who haven't filed. One year is worked at a time, with 2002 now being worked. The most egregious are identified each year, with the definition of egregious changing each year. The high dollar cases are identified and once all the notices are sent and if the year in question remains unresolved, the taxpayer delinquency cases go to the field. Even if a taxpayer doesn't get a notice for a prior year, the taxpayer is responsible for all unfiled tax returns. For example there were 1.5 million notices sent this year. Greg asked what percent were egregious. Susan didn't know. For the low dollar tax returns the approach is to educate and do outreach rather than pursue through other enforcement means. When IRS resolves the current year nonfiler problem, they also resolve all other outstanding nonfiler issues. The IRS can't leave any years unresolved. All prior years should show up in the notice, but might not pop-up. There is any number of reasons why a non-filer notice might not include all unfiled years. Becky Johnson said the non-filer program is working with TEC and the TAP Schedule C Non-Filer Committee looking at the non-filer notice. Chris Forzano is on the Sch C Non-filer committee and agreed to serve as the committee's link between the two groups.

Referrals

Alaska, Request for tax returns by IRS, #2496

Sherry is working with Bruce on this and will include Chris.

Montana, Ex's proof in audit #2567

Montana, Employee Benefits, #2527

Jim was not on the call, so the Montana issues were put on hold.

Oregon, Native American Names, #2581

Virginia asked if this issue could wait till next month.

Oregon, VITA Fax, #2619

Judi wondered why TAP is involved with this. The VITA site volunteer who raised the issue believes the IRS could save money by converting to fax machines. After some discussion, the group agreed that the issue should be closed with no further action. It appears to be a local issue.

Washington, Community Profit, #2614

This referral will be reassigned to Chris Forzano for discussion at the next call.

Around the Area

Sherry gave the members the opportunity to share their outreach activities since the last meeting.

Clayton Agena, Hawaii. Clayton introduced TAP at 4 meetings in January, one in February, and will go with his Local Taxpayer Advocate (LTA) to staff a booth in May.

Mario Burgos, New Mexico. Mario and the LTA are attempting to get on a local radio talk show on April 15th during the morning commute. Mario announced that he is running for the office of state representative. Election Day is June 1st. At each campaign stop he talks about TAP and gives the website link to improveirs.org



Skip Eshelman, Wyoming. Will be going to the Lions Club this month. Skip mentioned the talking point prepared by Judi and the committee members expressed interest in having a set.

Action: Judi will e-mail the talking points to all committee members.

Sharon asked the group what promotional items seemed to be in demand. Virginia felt anything with a phone number was useful. The post-it notes also seem to be popular. Tom Pub 4255 which contain a list of the most commonly used IRS phone numbers including TAP.

Chris Forzano, Washington. One on one outreach and a visit with the Sons of Italy.

Gregory Maciulla, Arizona. Working on newspaper story regarding financial literacy.

Sharon Stetz, Utah. Talked to a local VITA volunteer about a non-filer. The VITA site couldn't prepare the return free of charge since it was a prior year. Told it was only free for taxpayers with SSN. Audrey Dean, a Case Advocate on the Denver-TAS staff, works with VITA and said that the VITA program has software with 2 years prior, and her VITA site routinely prepares prior year's returns. Sharon also provided TAP materials at a tax preparation site and clients quickly took the materials.

Virginia Symonds, Oregon. Met with LTA and participated in a congressional liaison meeting on February 11.

Bruce Twomley, Alaska. Jerry Liboff, from Dillingham, had some concerns about what seemed to be a reduction in outreach in the rural Alaskan villages. Sherry mentioned that she is aware of a group applying for an LITC grant for 2005 to do outreach in the rural villages.

Sherry Whah, Alaska. Sherry has done a lot of classes since the last meeting and mentions TAP at each.

Closing

Tom adjourned the meeting.

NEXT TELECONFERENCE: March 15, 2004 2:00 pm PST.



Area 6 Committee Meeting Minutes
January 15, 2004
2:00 pm PST

Members in Attendance:

- Clayton Agena / HI
- James Bank / MT
- Darlene Bramon / ID
- Skip Eshelman / WY
- Chris Forzano / WA
- Gregory Maciulla / AZ
- Joe Reder / WA
- Virginia Symonds / OR
- Bruce Twomley / AK
- Sherry Whah / AK
- Tom Sherwood / Designated Federal Official

Members Absent:

- Mario Burgos / NM
- Sharon Stetz / UT
- Larry Barnard / ID

TAP Staff:

- Judi Nicholas
- Anne Gruber

Guests:

- Bernie Coston, TAP Director

Opening

Sherry Whah opened the meeting at 2:00 o'clock. Sherry welcomed everyone and reviewed the agenda. Sherry asked if there were any other items to be included. Since Bernie Coston was on the call, he was asked to speak to the group.

Roll Call

Anne Gruber took the roll call.

BERNIE COSTON

Bernie first wanted to thank the members for their time. He then talked about the National Taxpayer Advocate's Report To Congress, with its #1 problem this year being the Alternative Minimum Tax (AMT). He talked about recruitment, then opened up the discussion for questions. Joe Reder asked about retention of current TAP members during the next recruitment. Bernie will respond in a couple of weeks with the status of the current TAP members. Bruce asked about advertising Taxpayer Advocate Service (TAS).



Responses

The joint committee had recently received some responses to several issues that we elevated. The IRS response regarding several OIC suggestions was favorable and they plan to initiate the changes with the next revision of the Form 656, Offer in Compromise.

Darlene asked for an update on the effectiveness of the two centralized OIC call sites. Neither Judi nor Tom had any information on this, however Tom said most offers were not accepted. Almost half of all offers are returned as unprocessable. Unprocessable is merely a statement about the completeness of the forms and whether the taxpayer submitting the OIC is in bankruptcy or in full compliance with filing all tax forms for which he or she is liable. James Banks suggested a decision tree be added to the Form 656. Judi suggested we do some research first and maybe create a decision tree. Tom interjected that he is reviewing the draft Form 656 and instructions. It is set up in a decision tree type format, whereby the form calls for taxpayers to make decisions, and based on their answers, they could stop and not proceed. The new form gives thorough guidance on what is required to make a viable offer. Darlene asked for clarification and if the TAS would help a taxpayer fill out the forms. Tom said yes with certain qualifications, but TAS would prefer taxpayers work with the function involved first. Greg had an article with statistics showing 56% of offers were accepted in 6 months, and another 28% in 9 months. Tom said numbers are good, but could be better on front end of processing. Greg asked for clarification of what it takes for a case to go to TAS. Tom reviewed TAS criteria. Bruce reviewed the status of his proposal on taxpayer rights.

Also the joint committee sent us copies of the information that they have elevated to the IRS regarding the W-4 form and taxpayer rights.

Two issues were brought back to the area committee for more work. One, the proposal for a PTIN for childcare providers requires that the regulations be changed. Judi stated that issues of a legislative nature must be forwarded to the National Taxpayer Advocate rather than the committee formulating the regulations. Jim asked why not just tell the providers to get an EIN, Sherry explained that form is confusing and is often rejected by the IRS if no employees are anticipated. Judi asked if there are other occupations that might need a special identification number. Rather than go the legislative route, we could find out what the IRS processing instructions are and analyze why the forms are rejected. Armed with that information the committee might be able to make a recommendation for procedural changes. Judi indicated that the staff will do some research into why the EIN requests were rejected and perhaps arrange for an IRS staffer to talk with the committee about the EIN process.

ACTION ITEM: Anne will research the EIN process for the next meeting.

Another returned issue was the delinquent return issue whereby the taxpayer sent in several tax returns, some with balance due and some with refunds. IRS refunded some funds to the taxpayer, then sent her collection notices on the balances due. The IRS only considers one year at a time and appears to consider refund returns first. Yet people only do what they are asked for. Greg wants to find out the joint committee's track record and see what issues they have advanced. Their annual report lists everything, what was accepted and what was not. Greg asked Tom, as Local Taxpayer Advocate, what he would do if Sherry's client came to him. Sherry explained the Currently Not Collectible status. Tom agreed that the taxpayer received and cashed the refund, therefore, TAS would address the collection issues. In this case, it sounds like the taxpayer could not pay, therefore IRS put them into a suspended pay status which would be reviewed by IRS annually. Bruce and Sherry will rework the issue.

Referrals

Alaska, Request for tax returns by IRS, #2496

Sherry explained her area of interest involving notices that are sent out to taxpayers advising them of a tax return that is over due. The notice tells the taxpayer they need to file a return but does not mention all unfiled years. For example; a taxpayer is advised that the tax year 2001 needs to be filed,



but the notice does not mention the other five years that have not been filed. Why can't the IRS notice mention other years?

Only work one year at a time, Sherry wants a speaker to address the problem. **ACTION ITEM: Anne will ask the non-filer program if they could recommend a speaker for next meeting.**

Idaho, Universal POA form, #1595

Darlene reported that the ball is in the attorneys' court and they just don't have time these days to work on the idea. Tom Travers talked to the attorneys. We will park this issue till a later date and periodically ask about it..

Montana, Employee Benefits, #2527

Jim wrote exactly what he wanted to and felt that he said it all in the referral. We have sent an email to the form W-2 owner. Jim suggests that we just wait for an IRS response.

Washington, Internet theft, #2580

Joe is not sure where we are going with this but there are many incidents when someone loses over \$10,000 in an Internet auction, according to the FBI web site. But as far as the question about the \$3,000 Capital Gain limit, Jim said that this is definitely a Sch A item. There are certain limitations and restrictions with the current IRS Sch A loss, but a taxpayer can take a loss all in one year. Joe said to close case. He would contact the taxpayer who brought the matter to his attention.

Around the Area

Sherry gave the members the opportunity to share their outreach activities since the last meeting.

- Clayton Agena, Hawaii, nothing.
- James Banks, Montana, met 30 H&R Block preparers.
- Darlene Bramon, Idaho, has been doing one on one outreach.
- Skip Eshelman, Wyoming, is still struggling with his TAS office. Next week he will give a talk about search and rescue.
- Chris Forzano, Washington, met with the Sons of Italy.
- Gregory Maciulla, Arizona, still working on financial literacy. Working with SPEC.
- Joe Reder, Washington, busy working on EITC Committee.
- Virginia Symonds, Oregon, met with her TAS office yesterday and together they visited all the IRS offices.
- Bruce Twomley, Alaska, had one contact with a practitioner who had trouble with his OIC, but TAS helped ands everything is okay now. Bruce then asked if anybody had heard about lay offs at the IRS.
- Sherry Whah, Alaska, spent 30 minutes talking to 100 practitioners and taught a class where she mentioned TAP.

Closing

The third Monday in February is a holiday, so the monthly teleconference is moved to February 23, 2004.

Tom adjourned the meeting.

NEXT TELECONFERENCE: February 23, 2004 2:00 pm PST.