

**Tax Forms & Publications Committee, (TFP)  
Taxpayer Advocacy Panel (TAP)  
Meeting Minutes  
Tuesday, April 11, 2023**

**Designated Federal Officer (DFO)**

- Cedric Jeans TAP East Chief

**Members Present**

- |                           |                     |                 |
|---------------------------|---------------------|-----------------|
| • Tor Daley               | Anchorage, AK       | Member          |
| • Ellen Dickey            | Dakota Dunes, SD    | Member          |
| • Joel Gelb               | Brooklyn, NY        | Member (Absent) |
| • Philip George           | Saint George, UT    | Member          |
| • Kameelah Guthridge      | Columbus, OH        | Member (Absent) |
| • Charles Harvey          | Albany, NY          | Member (Absent) |
| • Jean Miller             | Middletown, CT      | Member          |
| • Kimberly Pederzani      | Barrington, IL      | Member (Absent) |
| • Taletha Manigo-Brown    | Ewa Beach, HI       | Member          |
| • Patricia "Pat" Thompson | Providence, RI      | Vice-Chair      |
| • Lucinda Weigel          | Vienna, VA          | Member          |
| • Angela Madison          | National Vice-Chair | Visitor         |

**Staff**

- |                          |                                    |
|--------------------------|------------------------------------|
| • Kevin Brown            | TAP Management Assistant           |
| • Frank Bustos           | Acting TAP Director                |
| • Rosalind Matherne      | TAP Program Analyst                |
| • Robert Rosalia         | TAP Program Analyst                |
| • Antoinette "Toni" Ross | TAP Program Analyst                |
| • Fred Smith             | TAP Program Analyst                |
| • Ann Tabat              | TAP Program Analyst                |
| • Mejbeen Balsara        | Program Analyst Wage & Investments |

**Public Participants**

Mr. Fenster

**Welcome/Announcements/Comments/Acknowledgement of Citizens**

Jeans opened the call and welcomed everyone on to the meeting.

**Roll Call**

Brown completed roll and quorum was met.

### **National Office Report**

Bustos welcomed everyone to the call and reminded the member of the plans and preparations for the face-to-face meetings next month.

### **DFO Report**

Jeans reported working on the agenda for the face-to-face meetings along with making it interesting and fun in the Washington, D.C. area. Jeans reported the tax forums will be staffed based on member locations and the least cost to the government. Fred Smith will lead this project and send a message out to the members soon. Smith asked members to send any suggestions or concerns regarding this to him by email.

Smith reported the recruitment period will be extended to April 30, 2023 and encouraged members to share this opportunity for vacancies to the public during outreach. The vacancy is available on the [www.Improveirs.org](http://www.Improveirs.org) or [usajobs.gov](http://usajobs.gov). Contact Fred for assistance.

### **Committee News & Updates**

N/A

### **Approval of Minutes**

March 28, 2023 meeting minutes. Rosalia indicated minor updates and corrections to the minutes once reviewed. Weigel motioned.

**Action: Minutes accepted as amended**

### **TAP Committee Update**

Rosalia indicated a change to the agenda from last year for a better flow.

### **IRS Responses Received**

N/A

### **Issue Awaiting IRS Response**

52476 - 1095-C

52596 - F1040

### **Subcommittee 1**

- **61996** – Publication 929- Daly motioned to dropped issue

**Action: issue response accepted responses from the IRS**

- **62742** – Form 8615 & Inst (Children Who Have Unearned Income)

Project proposal approved for work. Rosalia will send additional information about project with the potential to include Pub. 970.

### **Subcommittee 2**

- **52664** – Form 3520 & F3220A (Foreign Trust)

Weigel reported working this issue by doing research on transactions with foreign trust and gifts. We want to make the instructions clear and understandable for people to be

able to use. Rebecca Lammers has sent information that Rosalia shared with the committee and the project will continue to be finalized.

### **2022 TAP Annual Report (Committee Check List)**

Blurbs to be Assigned:

- 61996- Publication 929-(TD)

Rosalia indicated this area could help feed the newsletter report monthly along with helping towards the annual report project. Thompson asked was there a template or if there was additional guidance on the preparation of the blurbs. Rosalia said he will some additional guidance. Jeans indicated this topic maybe be discussed for the Annual Report during the face-to-face meetings, but they are still working on the agenda topics.

### **Screening Report**

Meeting will be held prior to next full committee meeting.

### **Outreach Report**

Activity Report- [www.tapSPACE.org](http://www.tapSPACE.org)

Members were encouraged to contact their Local Taxpayer Advocate (LTA) for potential Outreach opportunities. Rosalia asked the members if everyone had contacted their LTA. He informed them to let him know if they were having any trouble reaching their LTA so he can make sure to build that connection. Thompson reported some weekend she had scheduled with her LTA and encouraged members to contact their LTA for information on similar events.

Miller encouraged members to keep track of your outreach report and asked for assistance if needed. Rosalia reminded the committee to account for all their time including pre-reads, this meeting, and all TAP activity on the activity reports.

### **ICC Updates/Newsletter**

TFP needed to have someone represent them on the ICC committee- Jean Miller volunteered and was voted in unopposed.

Weigel and Daley will write something for the newsletter

Rosalia inquired about a Quality Review (QR) team, however no one wanted to commit to being the TFP official representative so the team will have members be assigned on a need's basis.

### **Chair Closing Comments & Round Table**

Rosalia spoke of information that will be presented during the face-to-face meeting. Some members maybe solicited to be a presenter during this process. Thompson solicited questions, comments, or thoughts about what the committee should be doing for the year. Mr. Fenster had several thoughts regarding, Foreign Banks and Financial Accounts (FBAR). Mr. Fenster gave the members a quick background of what he found



through his experience and would send in the information to Rosalia so that it can be discussed and potentially addressed when the committee reviews the form 1040.

About taxpayers using software should present this question also. Rosalia requested more details about this issue via email to allow the committee to consider this for a potential future project.

Bustos reminded the committee members to file and pay their taxes to lead by example and remain in compliance. Bustos went into further details requesting members travel early on Monday, May 15, 2023, for the face-to-face meetings.

Rosalia indicated the face-to-face will be the monthly meeting for the month of May.

### **Closing**

Jeans thanked everyone for joining and closed the meeting at 11:53pm ET.

**The next monthly meeting  
May 15, 2023, at 11:00am EST/12:00pm CST/1:00pm MST/2:00pm PST/7:00am  
AST/6:00am HST**

**These minutes have been approved and certified by the committee chairperson.**