

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

**Designated Federal Officer (DFO)**

- Cedric Jeans TAP East Chief

**Members Present**

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

**Staff**

- |                          |  |
|--------------------------|--|
| • Kevin Brown            | TAP Management Assistant                 |
| • Frank Bustos           | Acting TAP Director                      |
| • Kelvin Johnson         | TAP Program Analyst                      |
| • Robert Rosalia         | TAP Program Analyst                      |
| • Antoinette "Toni" Ross | TAP Program Analyst                      |
| • Ann Tabat              | TAP Program Analyst                      |
| • Mejbeen Balsara        | Program Analyst Wage & Investments (W&I) |

**Public Participants**

None

**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 not met. All actions in this meeting are administrative and voting decisions will be tabled to next month.

**National Office Report**

Frank Bustos thanked the members who joined the call and welcomed them.

Bustos reminded everyone the tax forums just started and we will be looking for members to speak to the committee about the tax forums to their respective committees. Bustos continued with a report going to Congress regarding the direct file project for 2024 filing season. Bustos will task Conchata Holloway with putting the link on [www.tapspace.org](http://www.tapspace.org) for the members to have access to it. If you want to find it, you can look up the term Direct File, per Bustos.

### **DFO Report**

Jeans thanked everyone who is participating in tax forums. Jeans also informed the committee the staff is in the interview process for the TAP 2024 year and may be slow with responding to some of the inquiries from committee members. Jeans spoke of the 1099-K project and asked everyone to add any recommendations and suggestions by July 21, 2023.

### **Committee News & Updates**

#### **Approval of Minutes**

June 13, 2023 minutes tabled until next month.

### **TAP Committee Update**

#### **Awaiting IRS Responses:**

**(With the JC for approval)**

- **52664 – Form 3520 & F3520A (Foreign Trust)**
- **62742 – Form 8615 & Inst (Children Who Have Unearned Income)**

Rosalia reported both of these referrals are awaiting review during the next Joint Committee meeting being held on July 17, 2023.

#### **Subcommittee 1**

Thompson reported:

- **55647 - Form 8915: Qualified Disaster Retirement Plan Distributions and Repayments**

This issue is almost done and will hopefully to be done for the August meeting. Send any suggestions to Rosalia.

- **57139 – Digital Assets/Crypto**

This issue is next for the subcommittee.

#### **Subcommittee 2**

Thompson reported:

- **52596 - F1040 – (Potential Rebuttal)**

The review of this IRS response is still in process and will hopefully be completed by the August meeting.

- **55265** - Form 2210: Underpayment of Estimated Tax by Individuals, Estates and Trusts

This is still being worked.

- **64919** - Decedent

This is still being worked

### **Outreach Report**

Miller reminded members to update activity reports. Miller indicated last event she had was cancelled due to bad weather.

### **ICC Updates/Newsletter**

Miller reported. The Speak-Up Brochure project has been completed. The ICC is currently working on improving the [www.improveirs.org](http://www.improveirs.org) page and Facebook page. Thompson indicated the newsletter should be ready to go forward for July since they is nothing to report from this meeting. Johnson indicated members should be able to upload their activity on [www.tapspace.org](http://www.tapspace.org).

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

Thompson asked members to let Rosalia know ahead of time to make sure there is some available to lead the group during the meeting. Lillie congratulated the committee on Issue 52664 being elevated to the Joint Committee meeting. The Attorney Advisors sent a letter to Frank Bustos congratulating the committee on this issue and letting us know they would add their voice to this issue should it be needed. Lillie indicated that the committee did a fabulous job and should be congratulated on it. Donna Patterson indicated that [www.tapspace.org](http://www.tapspace.org) is still slow when updating the activity report. Jeans indicated the Joint Committee meeting will be July 17, 2023, at 3:00pm.

### **Closing**

Jeans thanked everyone for joining and closed the meeting at 11:30am ET.

**The next monthly meeting  
August 8, 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.**