

**Tax Forms & Publications Committee, (TFP)
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Tuesday, October 10, 2023**

Designated Federal Officer (DFO)

- Robert Rosalia Acting TAP Director

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 |
| • Charles Harvey | Albany, NY | Member (Absent) |
| • Jean Miller | Middletown, CT | Vice-Chair (Absent) |
| • Patricia "Pat" Thompson | Providence, RI | Chair |
| • Lucinda Weigel | Vienna, VA | Member |
| • Eugene Lillie | National Chair | Visiting Member |
| • Angela Madison | National Vice-Chair | Visiting Member |

Staff

- | | |
|-------------------|------------------------------------------|
| • Kevin Brown | TAP Management Assistant |
| • Kelvin Johnson | TAP Program Analyst |
| • Antoinette Ross | TAP Program Analyst |
| • Ann Tabat | TAP Program Analyst |
| • Tamikio Bohler | Program Analyst Wage & Investments (W&I) |

Welcome/Opening

Robert Rosalia opened the call and welcomed everyone on to the meeting.

Public Participants

None

Roll Call

Brown completed roll and quorum was met.

Welcome/Announcements/Comments/Acknowledgement of Citizens

Thompson thanked and welcomed everyone for joining the call.

National Office Report/ DFO Report

Rosalia encouraged the committee to wrap up the current projects before the 2023 TAP year ends. Rosalia also suggested to hold a final screening meeting to review the

remainder of committee issues and start off 2024 with a clean inventory. The Chair and Vice-Chair elections will take place this month. On October 24, 2023, an informational session will be held for any members interested in TAP leadership for the 2024 TAP year. Rosalia encouraged anyone who is interested to attend. Members will be able to nominate others or self-nominate for the positions. If any members become a part of this process, they will need to campaign and participate in the campaign process. This allows the members to share with TAP their qualifications and what they can bring to these positions.

Approval of Minutes

September 12, 2023, minutes. Weigel motioned; George seconded.

Action: September minutes accepted as submitted.

TAP Committee Update

IRS Responses Received:

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

Tabat reported of the seventeen recommendations, the IRS approved to adopt seven. Weigel pointed out the adopt in principle responses need clarification. Subcommittee 1 will review as a possible rebuttal. Pat Thompson will write the updated blurb for this referral.

Awaiting IRS Responses

- **52664** – Form 3520 & F3520A (Foreign Trust) No current response
- **52596** – F1040 – (Rebuttal) **IRS requested extension until 11-15-2023**
- **55647** - Form 8915: Qualified Disaster Retirement Plan Distributions and Repayments- Awaiting Attorney Advisors (AA) and Systemic Advocacy (SA) response.

Subcommittee 1

Dickey reported:

- **57139** – Digital Assets/Crypto -Quality Review was completed. Committee to vote to submit to the JC contingent upon Systemic Advocacy & Attorney Advisor review.

Issue ready for vote. Dickey motioned; Gelb seconded.

Action: Issue elevated to Joint Committee (JC) contingent upon AA & SA response.

- **54759**- Form 8888 & Instructions-Allocation of Refund (Including Savings Bond Purchases)

Issue currently being worked.

Subcommittee 2

Weigel reported:

- **64919** - Decedent

There are up to 28 recommendations for this issue to make it easier for taxpayers to deal with the passing of a loved one.

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

This issue is being worked to improve completing this form and provide clarity.

Screening Report

The screening meeting will be held the week of October 23, 2023, the screening report has been uploaded to www.tapspace.org by Tabat. All members are invited to join the meeting. Gelb inquired why the issue regarding the Form 2848 revisions has not been added to the agenda. Tabat confirmed the issue was received and added into Systemic Advocacy Management System (SAMS). Rosalia advised the issue would be screened and determined if any additional associated issues, then accepted by the full committee.

Outreach Report Activity Report

Update and report your TAP activity on www.TAPSpace.org.
Keep up Outreach activities.

Thompson spoke about Jean Miller attending Operations stand down in her area this year and she could share more information during the next meeting as she is currently out of town.

ICC Updates/Newsletter

Thompson reported:

- Working on need for additional Outreach materials.
- Working on Speak Up brochure for VITA & LITC sites.
- ICC reviewed documents in Resource Outreach Toolbox-Update.
- Facebook postings- Send outreach pictures, article ideas about outreach events.
- Newsletter blurbs— Due October 20, 2023

Madison added, if members are having issues inputting outreach time, a spreadsheet can be sent to Kelvin Johnson. Lillie provided several examples of options for outreach opportunities: Chamber of Commerce; veteran organizations, community programs; and senior citizen organizations. Madison reminded the committee that our target market is every taxpayer and not a single demographic. We do not want to exclude any organization or any taxpayer group. Madison will share outreach information as

Guthridge requested a link or email. Tabat confirmed members submitting newsletter blurbs include Dickey for Subcommittee 1 and Weigel for Subcommittee 2.

Action Items

- September minutes approved to be posted.
- Issue 57139 elevated to JC after AA and SA review.
- Issue 62742 back to Subcommittee 1 for rebuttal.

Chair Closing Comments & Round Table

Thompson inquired about the year in survey. Rosalia indicated it has not been sent out. Thompson thanked everyone for attending the meeting and making quorum so we could move issues forward to the next step.

Closing

Rosalia thanked everyone for joining and closed the meeting at 4:15pm ET.

**The next monthly meeting
November 14, 2023, at 3:30pm EST/2:30pm CST/1:30pm MST/12:30pm
PST/11:30am AST/9:30am HST**

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