

**Taxpayer Assistance Center Improvements Project Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Wednesday, June 11, 2025**

Designated Federal Officer

- Fred N. Smith Jr. TAP Special Analyst

Attendance

- | | | |
|-------------------------|-------------------|---------------------|
| • Jim Simpson | Phoenix, AZ | Chair |
| • Jackson Bauzon | Los Angeles, CA | Vice-Chair (Absent) |
| • Elizabeth Colvin | Austin, TX | Member |
| • Quan Doan | Spring Valley, CA | Member (Absent) |
| • Mary "MaryAnn" Lawler | Dearborn, MI | Member |
| • Jennifer Reynolds | Tyler, TX | Member |
| • John Rodgers | Anchorage, AK | Member (Absent) |
| • Alan Stancill | Starkville, MS | Member (Absent) |
| • LaRee Lowman | Homewood, IL | Member (Absent) |

TAP Staff

- Kevin Brown TAP Administrative Assistant
- Jose Cintron TAP Program Analyst
- Saul Hernandez Acting TAP Director
- Rosalind Matherne TAP Program Analyst
- Matthew O'Sullivan TAP Program Analyst
- Kudiratu Usman-Olugunna TAP Program Analyst

IRS Staff

- Mejbeen Balsara Taxpayer Services Program Analyst

Members of the Public

N/A

Welcome/Opening Meeting

Smith thanked everyone for joining the call and introduced Hernandez as the new Acting TAP Director. Hernandez introduced himself and looking forward to a robust discussion.

Quorum

Quorum was not met.

Welcome and National Office Report

Smith indicated that with all the staff changes, the remaining staff is here to support the committee and there is a lot of additional information with all the changes taking place.

Minutes Review

April 9, 2025, minutes tabled to next month

May 14, 2025, minutes tabled to next month

Chair Report/ Volunteer Income Taxpayer Assistance (VITA) Project Review

Simpson suggested encouraging members to attend the monthly meeting to move forward with the committee business. Simpson reported reviewing three of the five tests for this project.

Public Comment

N/A

Subcommittees Report

Subcommittee 1

- Project 77942 Form 8821

Reynolds reported working all information related to this project and inquired if our work should be merged with the other team (committee). The committee decided to pause this work until getting guidance for this project. Smith noted there will be a meeting next week for how to approach this project.

Subcommittee 2

- Project 77881 Account Transcripts

Colvin reported project is to see what is important to taxpayers, consumers and tax preparers. This project is currently being worked by doing research and working on feedback from a number of different sources. This will be used to work on recommendations. Prior TAP committee projects are being reviewed to avoid duplication of recommendations.

New Issue Screening Report

O'Sullivan will set up new meeting to review new issues before next month's meeting to update the prior screening report. Simpson suggested to include O'Sullivan when emailing about committee projects.

Outreach

Smith acknowledged the difficulty over the last four to six weeks with the LTA staffing and reorganizations that have been done. Also, Smith encouraged members not to just rely on the LTAs for outreach opportunities for now. Smith said consider local options for outreach. We are working on a digital Speak-Up brochure

as an option to do outreach. Smith reported the next outreach meeting was moved to June 24, 2024.

Simpson spoke about being done with Wells Fargo for a Bank On project to deal with the executive order stopping paper checks as of September 30, 2025. In lieu of this change, the Bank On project is seeking to help taxpayers in getting bank accounts to be able to receive electronic payments.

Internal Communications Committee (ICC)

Smith indicated ICC merged with Outreach, with little to report at this time. The focus is to like and share the TAP Facebook page. Share content to Kyle Kipple to be posted to the page. Brown will create printed name badges and send them out to committee as a workaround since we cannot get new name tags or new business cards. Simpson may fill in to do this month's newsletter if needed. Reminded everyone for the Schedule.

Action Items

O'Sullivan stated he will complete the following action items:

- Minutes tabled to next month.
- O'Sullivan is the go-to for outreach reports.
- O'Sullivan will follow-up with inactive members.

Roundtable

Closing

Smith officially closed the meeting, at 1:28 PM, EDT.

**Next Meeting: Wednesday, July 9, 2025
1:00PM EDT, 2:00PM CDT, 10:00AM MDT, 09:00AM PDT**