



## LESS TAXING MATTERS

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# Upbuilding the Profession: Doing the Right Thing Because It's the Right Thing to Do

This spring gave me the opportunity to attend several local TEI events, allowing me both to witness the vitality in the Institute's chapters and regions and to renew friendships with many members whose ability to attend Institute-level programs has been constrained by reduced travel budgets. When I speak at a chapter meeting, I thank the local leaders and the meeting's organizers, noting that there are only 18 people in the world who are paid by TEI — those of us on the staff. While my D.C. colleagues' contributions to the Institute's success are substantial, all of us acknowledge that the bulk of the work is done, on a volunteer basis, by the members. When an organization is well into its seventh decade, it is easy to take for granted what is, without question, truly remarkable: Year after year, talented women and men who already live intensely busy lives raise their hands and say, "Yes, I'll help."

*Think upon it:* There are precious few TEI members who work for companies that do not in 2010 ask them to do more with less and hence whose workload is not greater than it was a year ago. And there is likely not a single member who does not have substantial personal responsibilities, relating to children, parents, or other family members, to a church, synagogue, or mosque, to a school, or to one or more social service organizations. And yet, every day, across the globe — from Singapore to St. Louis, Hong Kong to Kansas City, Amsterdam to Atlanta, Calgary to Santa Clara — members step up to the challenge of contributing to TEI. Atop the Table of Contents of each issue of *The Tax Executive*, there is a quotation attributed to Theodore Roosevelt that "Each man owes some of his time to the upbuilding of his profession." Putting aside the non-inclusive language that TR used those decades and decades ago, those words have been the credo of TEI's volunteer leaders at all levels since 1944.

Indeed, during a 2005 conversation, the daughter of TEI's founder, Paul Smith, spoke of the ethical underpinnings of TEI. Sister Carol Ann Smith talked about the obligation that her father and other founders felt toward "upbuilding the profession." She also spoke about how her father and the other early leaders of the organization travelled the United States, using their own (or their company's) resources to promote the fledgling tax organization. To be sure, individual members benefitted from the network of tax professionals that was being created; they benefitted, too, from the educational programs that the Institute hosted and from the rapport that TEI established with government officials. But the found-

ers were possessed by more than self-interest: They were driven by a sense of responsibility — of doing the right thing because it was the right thing to do.

The right thing to do in 1944 remains the right thing to do in 2010: Giving back to the community, to the profession.

### Minnesota

Following the Midyear Conference, my first trip was to the Minnesota Chapter for its 27th Annual President's Seminar, a two-day meeting that routinely draws more than three hundred registrants. (Last year's program drew more than the Institute's own spring conference.) The 2010 President's Seminar was chaired by **Arne Espeseth** of Tornier, who served as the 2007-2008 leader of the Minnesota Chapter. Arne did his predecessors and the entire chapter proud by the way he marshalled the chapter's resources and put together an absolutely outstanding program.

Because Arne was busy with last-minute details, he was not able to join **Jurgen Adam** of Ceridian, this year's chapter president; **Karen Piehler-Shaw** of the same company, the immediate past president; and Kenneth Clapshaw of Katun Corporation, the first vice president, and me for dinner the night before the President's Seminar began. It's always interesting and gratifying for me to meet with local Institute leaders to discuss "the state of the chapter" and to learn how the chapter is working to help its members cope with whatever challenges the economy, government tax authorities, and the latest business trends are throwing at them. This year, I took the opportunity to talk up the Institute's new website and to pick Jurgen's, Karen's, and Ken's brains on how the Institute — through the website and otherwise — can help the members.

The technical content of the 2010 President's Seminar was top-notch, demonstrating once again that TEI's sharpest competition comes from the chapters. To me, however, the highlight of the conference was the luncheon program on the first day when Jurgen presented the Meritorious Chapter Service Award to one of his predecessors, **Don Stiles**. A long-time tax executive with Northwestern National Life Insurance Company (now ING/ReliaStar), Don joined TEI in 1984, served on most if not all Minnesota Chapter committees, and was both 1991-1992 chapter president and a member of the Institute Board of Directors. He was also was on the board of the Minnesota Taxpayers Association for 13 years and was extremely active with AccountAbility Minnesota, an organization

dedicated to providing free tax preparation services to low- and moderate-income taxpayers. Don served on the group's board for a decade, culminating in his service as its president, and was a volunteer tax preparer for more than 15 years.

Don's service to AccountAbility Minnesota would by itself justify the award. When he joined the group, it was struggling a bit, and as president he recruited an active, engaged board (including several TEI members), raised funds, established internal procedures, and initiated a long-term strategic plan.

Don Stiles is the epitome of a TEI member "upbuilding his profession," and it gave me great pride to be in the audience when he received his award. I was also proud to be asked to combine the award presentation to Don with the making of a Social Responsibility grant from the Institute to AccountAbility Minnesota, the first organization to receive back-to-back donations. The Minnesota Chapter's connection with the nonprofit — with Don Stiles's and many members' volunteering on a yearly basis — makes it an especially fitting beneficiary of the Institute's Social Responsibility Initiative. In accepting the grant, Tracy Fischman, Executive Director of AccountAbility Minnesota, noted that in 2010, the organization served more than 9,600 taxpayers, resulting in refunds of more than \$18.6 million. In addition, Ms. Fischman presented the Institute with the organization's Corporate Partner Award.

### Kansas City

While I was not able to be in Kansas City for that chapter's presentation of another Social Responsibility grant to the University of Missouri-Kansas City's tax clinic — the meeting was held while I was in Minnesota for the President's Seminar — I would be remiss if I did not make note of it. The clinic represents qualifying taxpayers with federal and state tax controversies, assisting taxpayers in the Kansas City metropolitan area (on both sides of the state line) with a multitude of tax issues and in a variety of venues (including refund claims, offer in compromise, installment agreements, innocent spouse relief requests, Appeals, and the U.S. Tax Court).

Special thanks to **Paul Steiner** of Commerce Bancshares, Chapter Representative on the Institute Board of Directors; **David Rankin** of Seaboard Corporation, Chapter President; and Jeff Stamm, a director of the Kansas City Chapter, for all their efforts through the past year, generally and with respect to the chapter's outreach to the Tax Clinic. It was Jeff who presented the Social Responsibility grant to **Frank Schuler**, who is director of the clinic.

### Calgary

Although TEI business has taken me to Alberta several times during my tenure on the Institute's staff, the sad truth is that until this year I had not attended a meeting of the Calgary Chapter. I promised last year's president, **Shiraz Nazerali** of Devon Canada Corporation, that I would rectify the situation, and this year's president, **John Lynch** of Canadian Pacific Railway, helped me stay true to my word by inviting me to attend the chapter's May meeting. As it turned out, John was out of town on business, so **Ella Stuart** of Shaw Communications, the chapter's second in command, stepped in.

Ella not only ran an excellent technical program (with the topic, Strategies for Dealing with CRA Attempts to Access Working

Papers and Extend Reassessment Periods, having cross-border appeal), but she kindly arranged a breakfast meeting for me with her and several other members of the chapter's leadership (**Shannon Baker, Sandy Shanks, Kim Berjian, Lynn Moen, and Bruce Hollebhone**). One slight digression: Our group ate breakfast in the 1886 Buffalo Café, which is housed in a small wooden building that is rumored to be one of the oldest, if not the oldest, structure in Calgary and to have served breakfast since 1866.

The chapter meeting was planned by **Greg Perrin** of Suncor Energy, and the speaker (Edwin Rowe of Blake, Cassels & Graydon) was introduced by Sandy, who works at Conoco Phillips Canada. As was the case in Minnesota, I had the happy chore of handing a check to a recipient of a TEI Social Responsibility grant. This time it was Children's Wish of Alberta, whose director, Jason Evanson, made an excellent presentation on what the Institute's donation would enable the charity to do. I was also able to pay tribute to two former members whose service to TEI was phenomenal: **Drew Glennie**, past president of the Institute and now an Honorary Member of the Institute; and **Monika Siegmund**, a former colleague of Drew's at Shell Canada, who was the recipient of the Calgary Chapter's 2009 Meritorious Service Award and who has served as chair of both the Canadian Income Tax Committee and the Institute's Membership Committee (as well as numerous chapter-level committees). Monica and Drew are an example to all of us, and it was good to see them — and thank them — on their own "turf."

### Santa Clara Valley

The day after the Calgary meeting, I was in northern California, attending an all-day meeting of the Santa Clara Valley Chapter at Oracle's headquarters. The meeting — the chapter's 14th Annual Software/E-Commerce Day — featured more than 15 top professionals from Baker & McKenzie, and rightly drew an impressive audience. Special thanks to **Rick Hoag** of Oracle for making his company's facilities available to the chapter, and for **Don Rath** of Synopsys (the chapter president) for making me feel at home. Don was kind enough to chauffeur me from the hotel to the meeting location (and back), and to arrange a great dinner with the chapter board. Thanks to the following members of the chapter's leadership for giving up their evening to meet with Don and me: **Bill Barrett** (the chapter's representative on the Institute's Board of Directors), **Don Blach, Karen Burns, Mickey Clayton, Murray Dean, Rick Eigenbrode** (2010-2011 Chapter President), **Rick Hoag, Lorraine McIntire, and Peter Waterstreet**.

The reason for my trip to the Santa Clara Valley, other than to renew my ties with the leaders and members of one of the Institute's largest chapters, was to present the first TEI Pro Bono Award to **Alan Sankin** of Dolby Laboratories. The award, created two years ago as part of TEI's Social Responsibility Initiative, recognizes volunteer efforts by a TEI member in the tax or finance area. Alan's award — which is the subject of a separate article in this issue — was occasioned by his outstanding work for a group called Lawyers for One America. In accepting the award, Alan issued the following call to action:

As tax professionals, we have some specific, well-honed skills around our tax system that can be of great assistance to indi-

viduals and not-for-profits who lack the necessary resources. I know we pride ourselves in the professional work we do each day for our respective employers, but we can — and should — use that knowledge to assist those who are less fortunate. I am reminded of that television show “Extreme Makeover: Home Edition,” where at one point someone yells, “Move That Bus,” and the recipients of the new home are dumbstruck and awed by what the community provided.

I see that same reaction when I resolve a garnishment, file old tax returns, or settle a lingering tax dispute that has been such a devastating hindrance to someone on the road to recovery.

We do have the knowledge and ability to do that throughout the country, and we should and must.

Well said, Alan. Well said.

### New England Chapter

My last chapter visit in May was to New England, where I attended an All-Day Tax Seminar in Needham, Massachusetts. **Jon Kasdan** of Altra Industrial Motion, the chapter president, ended his year on a high note with an excellent program: The meeting — organized by **Fran Skypeck** of National Grid USA Service Company — drew a record crowd (225), and featured one outstanding presentation after another.

The all-day meeting also saw the election of Jon’s successor, **Chris Digan** of EMC, and the introduction of **Paul O’Connor** of Millipore as TEI’s 2010-2011 Institute President and **Cathy Gallagher** of Connell Limited Partnership as next year’s Vice President-Region III. Thanks go to all these individuals for their efforts (in the past and in the weeks and months to come), and to the following individuals who (in addition to those already mentioned) attended the speaker’s dinner the night before: **Tim Garahan**, **Craig Jacobson**, **Bob McDonough** (Institute Past President), **Karen Miller** (Chapter Representative), **Tony Paolillo**, **Stephen Rice**, and **Tim Wigon**. (An extra nod of gratitude to **Bob McDonough**, who gave me a ride to the dinner and who reminded me how good the Washington Nationals might be with Steven Strasburg on the mound.) Year in and year out, these individuals — and countless others across the Institute — give their time to plan meetings and advance the objectives of their chapters and the Institute at large. They have given their time to up-build their profession. Teddy Roosevelt would be proud.

### TEI Staffing News

March 18 marked the 25th anniversary of **Deborah Gaffney**’s joining the staff of Tax Executives Institute as our Director of Conference Planning. For a quarter century, Deborah has coordinated the logistics of all TEI meetings — from our conferences, seminars, and week-long courses to our summer leadership meetings and more than a few local meetings. She has more-than-ably represented the Institute in contract negotiations, planned countless meal functions and social events, worked with TEI’s committee chairs and legal staff to make



Deborah Gaffney and Ruth Robinson

the best use of the available time and space at TEI’s educational programs, and been TEI’s onsite “field general” for our meetings.

In addition, Deborah helped create TEI’s successful sponsorship program, and has co-managed it since its inception in 2001. She has also assisted the leaders of TEI’s network of local chapters in planning meetings, and has served as a coach and mentor for other meeting planners, not only on TEI’s staff but elsewhere. Her thoroughness and sound judgment are exceeded only by her dedication, loyalty, and unfailing moral code. She is a true asset to the Institute and a good personal friend.

The end of March brought the retirement of **Ruth Robinson**, who was hired by TEI on March 22, 1988. To call Ruth a receptionist understates her value to the Institute. For 22 years, she was “the voice of TEI,” greeting visitors and answering the phone with efficiency and cheerfulness. She also managed the Institute’s lockbox, and assisted in several other areas. Ruth was loyal, dependable, candid, always pleasant, and had a good sense of humor — all traits that are essential in a “Director of First Impressions.” She will be greatly missed.

### Needs Must When the Devil Drives

The Spring 2010 issue of *The Tax Executive* (volume 62, number 2) is a combination of March-April 2010 and May-June 2010 issues; thus, volume 62 will consist of five rather than the typical six issues.

The decision to combine the issues was made in light of the real-time availability of TEI technical submissions on the Institute’s revamped website, production delays, and a reduced number of advertising pages. All subscriptions will be automatically extended by one issue.

*Timothy J. McConally*