

# NATIONAL TAXPAYER ADVOCATE PUBLIC FORUMS

CONVENED BY NINA E. OLSON, NATIONAL TAXPAYER ADVOCATE AND  
THE HONORABLE LLOYD DOGGETT, U.S. REPRESENTATIVE, 35TH DISTRICT, TX  
MAESTRO ENTREPRENEUR CENTER | 1811 S. LAREDO STREET  
SAN ANTONIO, TX  
TUESDAY, AUGUST 30 | 8:30 AM - 10:00 AM



## Nina E. Olson

Nina E. Olson, the National Taxpayer Advocate, is the voice of the taxpayer at the IRS and before Congress. Under her leadership, the Taxpayer Advocate Service helps hundreds of thousands of people every year resolve problems with the IRS and addresses systemic issues within the IRS. Her Annual Report to Congress identifies the most serious problems facing taxpayers and recommends solutions. In 2014, the IRS adopted the Taxpayer Bill of Rights for which Ms. Olson had long advocated, placing dozens of existing rights in the Internal Revenue Code into ten fundamental rights, and making them clear, understandable, and accessible for taxpayers and IRS employees alike. Tax Analysts recently honored Nina Olson as one of ten Outstanding Women in Tax for 2016. This recognition reflects Nina Olson's influence on the work of legislators, tax administrators and tax professionals across the globe. She is a graduate of Bryn Mawr College and North Carolina Central School of Law, and she holds a Master of Laws degree in taxation from Georgetown University Law Center.



## Lloyd Doggett

U.S. Congressman Lloyd Doggett, is an active participant in local events, representing a district that stretches from San Antonio to Austin. He is a senior member on the House Ways & Means Committee, with jurisdiction over tax and trade, as well as Social Security and Medicare. An outspoken advocate for small businesses, he is an active partner with the Hispanic Chamber and South Chamber in San Antonio. Congressman Doggett's bill to expand the San Antonio Missions National Historical Park was signed into law by Pres. Obama and he supported the long-standing efforts to receive UNESCO World Heritage Designation. Rep. Doggett is a vocal advocate for tax code fairness to ensure an even playing field for those businesses that pay their fair share. His office is located at 217 W. Travis near Santa Rosa Children's Hospital.

## Polly Bone

Polly Bone is an attorney with Texas RioGrande Legal Aid, Inc. and is director of the Texas Taxpayer Assistance Project, TRLA's Low Income Tax Clinic. She currently works from their office in San Antonio, Texas. Prior to holding this position, she was a staff attorney with TRLA in San Antonio handling employment, immigration, and federal income tax cases. From 2000-2003 she was the branch manager of Texas Rural Legal Aid's office in Plainview, Texas, which represented migrant farmworkers. Ms. Bone is a graduate of Harvard Law School and has been licensed to practice law in Texas since 1993.



### **Jim Oliver**

Jim Oliver CPA/PFS/CGMA, CFP® is Chairman-Elect of the Texas Society of CPAs (TSCPA) and a past President of the San Antonio Society of CPAs. In 1981, he founded Jim Oliver & Associates, P.C., a CPA firm that provides tax planning and compliance services to clients ranging from low income widows to some of San Antonio’s most successful families.

Jim served three years as Today’s CPA’s Technical Editor and on two dozen TSCPA committees, councils or task forces, chairing over a half dozen of those, including the Taxpayer Education and the Relations with IRS. He has served on IRS Practitioner liaison groups and was awarded the IRS Certificate of Meritorious Community Service for his taxpayer education efforts.

Jim holds a B.B.A. from Baylor University and has experience in industry and on Big 8 audit staff. In 2003, he founded Financial Life Advisors, a wealth management firm which he still runs.



### **James A. Smith**

James A. Smith, CPA, serves as Managing Director of Smith, Jackson, Boyer & Bovard, PLLC, a Dallas Certified Public Accounting firm. He practices principally in tax compliance and controversy representation for individuals and entrepreneurial businesses.

Mr. Smith served as Chair of the Texas Society of CPAs (TSCPA) for the 2007-2008 year, and as a member of its Federal Tax Policy Committee since its inception. He served as a member of the AICPA Council 2007 through 2011 and from 2012 through 2015. He also served as an appointed member of two of the AICPA’s key standard setting committees: the Accounting and Review Services Committee from 2008 through 2011 and the Tax Practice Responsibilities Committee, 2014 to 2017.

Mr. Smith is a graduate of Southern Methodist University with a BBA in Accounting and Economics. He is a Certified Public Accountant in the state of Texas and is a licensed



### **Jonnie “LaMarr” Queen**

LaMarr Queen retired from the Air Force in 2007 and was hired in 2008 as the Tax Program Coordinator for Joint Base San Antonio (JBSA) - Randolph, an IRS VITA site. He has been in that position since that time and managed the preparation of over 13,000 returns. Part of his duties include managing the JBSA-Randolph tax center, providing tax law and return preparation training each year to preparers, preparing tax returns, explaining tax law to clients to help them understand situations on

their tax returns, counseling individuals on things they can do to improve their tax return if they end up with a balance due, and helping clients with IRS letters that they may receive. LaMarr has been awarded two IRS Leadership Awards for his work at the JBSA-Randolph VITA site. He also owns a small tax preparation business which he started in 2014.



### **Jaime Vasquez**

Jaime Vasquez, JD, CPA. Shareholder, Chamberlain, Hrdlicka, White, Williams & Aughtry, San Antonio, TX. Mr. Vasquez represents for-profit and non-profit entities and individuals in income, employment and excise tax disputes with the IRS and state and local taxing authorities. Specifically, Mr. Vasquez has experience resolving IRS examinations, collection cases, installment agreements, offers in compromise, requests for collection due process hearings, private letter rulings and requests for innocent spouse relief.

Mr. Vasquez was named as a “40 Under 40” by San Antonio Business Journal (2015) and a “Texas Rising Star” by Texas Monthly and Super Lawyers Magazine (2014-2016). Board Certified in Tax Law, Texas Board of Legal Specialization. New York University, School of Law, L.L.M. in Taxation, University of Texas at Austin, School of Law, University of Virginia, Master of Science in Accounting, University of Virginia, Bachelor of Science of Commerce (Accounting). Certified Public Accountant (Texas, Virginia).