



## 2025 Annual LITC Grantee Conference

Tuesday, December 10 – Thursday, December 12, 2024

The Westin Alexandria Old Town

Alexandria, Virginia

Links to virtual sessions and session materials  
can be found on the LITC Toolkit

### Tuesday, December 10, 2024

9:00 – 9:30	<b>Welcome and Program Office Updates</b> Presenter: Tamara Borland, Director, LITC Program Office (TAS)	<b>Location: Edison Room</b>
9:30 – 10:15	<b>Address by the National Taxpayer Advocate</b> Presenter: Erin Collins, National Taxpayer Advocate (TAS)	<b>Location: Edison Room</b>
10:15 – 10:30	BREAK	
10:30 – 11:30	<b>Tax Practice in the Age of Quickly Evolving Technology*</b> Presenters: Karen Sheely, Privacy, Governmental Liaison & Disclosure, Technical Advisor (IRS) Frank Agostino, Agostino & Associates, P.C.	<b>Location: Edison Room</b>
11:30 – 11:45	BREAK	
11:45 – 12:45	<b>Federal Tax in Tribal Communities*</b> Presenters: Chelsi Tsosie, Christine Brunswick Fellow, DNA People's Legal Services Fatima Abbas, Director, Office of Indian and Native Affairs, U.S. Department of Treasury Julie Bolton-Hanlon, Deputy Assoc. Chief Counsel Guidance, Office of Chief Counsel (IRS) Leslie McLean, Clinic Director, DNA People's Legal Services	<b>Location: Edison Room</b>
12:45 – 2:00	LUNCH & EXHIBIT HALL	
2:00 – 3:00	BREAKOUT SESSIONS	
	<b>Evaluating The Right Collection Alternative for Your Taxpayer*</b> Presenters: Christa Page, Clinic Director, Florida Rural Legal Services Thomas Freeman, Staff Attorney, Colorado Legal Services Mary Ann David, Clinic Director, Greater Miami Legal Services	<b>Location: Edison Room D</b>
3:00 – 3:15	<b>Qualified Offers and Recovery of Fees in Tax Litigation*</b> Presenters: Chris Bourell, Clinic Director, Toledo Tax Controversy Clinic Elizabeth Maresca, Clinic Director, Fordham Law School Shannon Castañeda, Senior Counsel, Procedure and Administration, Office of Chief Counsel (IRS)	<b>Location: Edison Room C</b>
	BREAK	
3:15 – 4:15	BREAKOUT SESSIONS	
	<b>Representing Multi-Year Non-Fileers and Return Filing Tips*</b> Presenters: Yale Robinson, Staff Attorney, Northeast Legal Aid Mel Jiganti, Clinic Director, Northeast Legal Aid Amanda Watson, EA, Customer Success, Drake Software	<b>Location: Edison Room D</b>



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	<p><b>Crossing the Line: When a Good Case Goes Bad*</b> <span style="float: right;"><b>Location: Edison Room C</b></span>  Presenters: Ramon Ortiz, Supervising Attorney, University of Washington LITC  Jeff Dirmann, Dirmann, P.C.</p>
4:15 – 4:45	BREAK & EXHIBIT HALL
	BREAKOUT SESSIONS
4:45 – 5:45	<p><b>Case Management Tips and Tricks – LegalServer</b> <span style="float: right;"><b>Location: Edison Room D</b></span>  Presenters: Nathaniel Puffer, Clinic Director, New Mexico Legal Aid  Polly Bone, Clinic Director, Texas RioGrande Legal Aid  Andrea Meals, Senior Paralegal, Villanova Federal Tax Clinic  Karyna Lopez, Clinic Director, Lone Star Legal Aid LITC  Xander Karsten, Director of Onboarding &amp; Projects, LegalServer</p> <p><b>Case Management Tips and Tricks – Clio</b> <span style="float: right;"><b>Location: Edison Room C</b></span>  Presenters: Masood Chotani, Director, Taxpayer Help Center  Christina Wease, Clinic Director, Michigan State University</p> <p><b>Case Management Tips and Tricks – Canopy, Excel, and Other</b> <span style="float: right;"><b>Location: O’Grady Room</b></span>  Presenters: Angela Hale, Attorney, Neighborhood Christian Legal Services LITC  Sherry Almquist, Clinic Director, Utah TaxHelp LITC  Daniel Vincent, Qualified Tax Expert, Utah TaxHelp LITC</p>



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9:00 – 10:00	<b>Duplicate Dependent Returns – Filing Season 2025*</b> Presenters: Ishmael Alejo, Director, Refundable Credits Program Management (IRS) Annette Carney, Sr. Technical Advisor, Electronic Filing Services, Taxpayer Services (IRS) Bill Sellitto, Supervisory Tax Analyst, Identity Protection, Taxpayer Services (IRS)	<b>Location: Edison Room</b>
10:00 – 10:15	BREAK	
10:15 – 11:15	<b>Equitable Tolling in the U.S. Tax Court*</b> Presenters: Chris Bourell, Clinic Director, Toledo Tax Controversy Clinic Eric J. Konopka, Associate, Latham & Watkins LLP	<b>Location: Edison Room</b>
11:15 – 11:30	BREAK	
11:30 – 12:30	<b>Troubleshooting CAF Issues with TDS and PPS*</b> Presenters: Bob Probasco, Clinic Director, Texas A&M School of Law, Tax Dispute Resolution Clinic Frederick Riccio, Senior Tax Analyst, Accounts Management (IRS)	<b>Location: Edison Room</b>
12:30 – 1:30	LUNCH & EXHIBIT HALL	
1:30 – 2:30	<b>LITC Case Review Roundtables – LITC Clinicians Only</b> U.S. Tax Court Collection Due Process Automated Collection Systems Offer in Compromise	<b>Location: O’Grady Room</b>
	<b>LITC Case Review Roundtables – LITC Clinicians Only</b> Worker Classification Innocent Spouse Audit Reconsideration Identity Theft Correspondence Exam	<b>Location: Edison Room D</b>
	<b>A Conversation with the new Executive Director of Systemic Advocacy</b> Presenter: Andrew Beckwith, Executive Director Systemic Advocacy (TAS)	<b>Location: Edison Room C</b>



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2:30 – 3:00	BREAK & EXHIBIT HALL	
3:00 – 4:00	BREAKOUT SESSIONS	
	<b>Implementing Diversity, Equity, Inclusion and Belonging in your LITC</b>	<b>Location: Edison Room C</b>
	Presenters: Elizabeth Maresca, Clinic Director, Fordham Law School Janice Shih, Clinic Director, University of Baltimore School of Law	
	<b>LITC Rescue! Process Improvement Strategies and Tools</b>	<b>Location: Edison Room D</b>
	Presenters: Angel Eason, Clinic Director, Legal Services of North Florida William Bard, Advocacy Analyst, LITC Program Office (TAS)	



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BREAKOUT SESSIONS	
8:30 – 9:30	<b>Social Media Made Simple: Engage, Educate, Empower</b> <span style="float: right;"><b>Location: Edison Room D</b></span> Presenters: Lindsey Pope, Public Affairs Specialist, Communications & Online Services (TAS) Brittany Strasburg, Public Affairs Specialist, Communication & Online Services (TAS) Jennifer Gardiner, Clinic Director, Legal Aid of Arkansas LITC
	<b>Comparing and Contrasting LITC and LSC Requirements and Restrictions</b> <span style="float: right;"><b>Location: Edison Room C</b></span> Presenters: Heather Frank, Clinic Director, Colorado Legal Service LITC Mark Freedman, Senior Associate, General Counsel, Legal Services Corporation Tamara Borland, Director, LITC Program Office (TAS) Brittany Sims Nwankwoala, General Counsel, Legal Services Corporation
9:30 – 10:00 BREAK & EXHIBIT HALL	
BREAKOUT SESSIONS	
10:00 – 11:00	<b>Alternative Dispute Resolution*</b> <span style="float: right;"><b>Location: Edison Room C</b></span> Presenters: Michael Bailiff, Senior Advisor, Independent Office of Appeals (IRS) Mary Slonina, Managing Director of Practice, Procedure, and Administration, Tax Controversy and Dispute Resolution, KPMG
	<b>Scams and Schemes*</b> <span style="float: right;"><b>Location: Edison Room D</b></span> Presenters: Angela Siener, Senior Staff Attorney, Prairie State Legal Services Jaushua L. Brewer, Acting ASAC, Criminal Investigation (IRS)
11:00 – 12:30 LUNCH & EXHIBIT HALL	
12:30 – 2:00	<b>Simple Notice Initiative</b> <span style="float: right;"><b>Location: Edison Room</b></span> Presenters: Tina Dix, Director, Taxpayer Correspondence Services (IRS) Sarah McLemore, Special Counsel, Taxpayer Services Division Counsel (IRS) Fumino Tamaki, Chief Taxpayer Experience Officer (IRS) Jan Millard, Technical Project Manager, Human Centered Design Expert, RAAS (IRS)
2:00 – 2:15 BREAK	
2:15 – 3:05	<b>Direct File*</b> <span style="float: right;"><b>Location: Edison Room</b></span> Presenter: Bridget Roberts, Chief Direct File (IRS)
3:05 – 3:30	<b>Closing Remarks</b> <span style="float: right;"><b>Location: Edison Room</b></span> Presenter: Tamara Borland, Director, LITC Program Office (TAS)