Tax Alumni Come Back to the Classroom

October 10, 2016

Participants

Chris Bergin 1981
Christina Ciaramella D'Elia 2005
Anna Dokuchayeva 2011
Elizabeth Feeley 2009
Brad Lombardi 2009
Katie Harris Lombardi 2009
Erin McKinney 2008
Barry Rickert 2009
Jay Scharf 2012
Dan Timins 2007

Biographies of Participants

Chris Bergin, president and publisher of Tax Analysts, is an authority on federal tax policy. He joined Tax Analysts in 1991, serving as the editor of its flagship publication, *Tax Notes*, for eight years before taking control of the overall operations of the organization. Tax Analysts has grown significantly under Bergin's leadership, becoming recognized as an influential and nonpartisan source of tax news, analysis, and commentary. Bergin is also at the forefront of the fight for transparency in tax systems, not just in the United States, but around the world. For more than 30 years, he has written extensively on federal tax issues and is often quoted for his bold opinions. Before joining Tax Analysts, he managed several federal tax products at Prentice Hall Inc. Bergin has a B.A. in history from Boston College (1974) and a J.D. from Pace University School of Law (1981). In 2008 he completed the Senior Executive Program at the Columbia University Graduate School of Business.

Christina Ciaramella D'Elia is Counsel to Morris & McVeigh LLP, a boutique trusts and estates firm in New York City. She graduated from Binghamton University (B.A., *cum laude,* 1998) and Pace Law School (J.D. 2005). She was turned onto the practice of trusts and estates after taking Federal Income Tax in her second year, and took every available tax, trusts and estates course available in the curriculum, including Wills and Trusts, Estate Planning, Federal Estate and Gift Taxation and Corporate Tax, all of which she encountered in her first position as an associate with Bashian and Farber LLP, and then as a Trust Officer with United States Trust Company (now Bank of America Private Wealth Management), working exclusively with the administration and termination of trusts. She returned to private practice and has been with Morris & McVeigh for 6 years. Her practice focuses on all aspects of estate planning for mid- to high-net worth clients, estate and trust administration, and the representation of fiduciaries. She has been an Adjunct

Professor at Pace Law School, is very active within the New York State Bar Association Trusts and Estates Section, and was a co-author of an American Bar Association book on tax and estate planning.

Anna Dokuchayeva is an associate at Hawkins Delafield & Wood LLP in New York, New York. She graduated from Cornell University (B.S. 2006), Pace Law School (J.D. 2011) and New York Law School (LL.M. in Tax, 2011). While in law school, Anna worked at Welby Brady & Greenblatt LLP and engaged in John Jay Legal Services, Inc. – Investor Rights Clinic. She took Federal Income Tax and Corporate Tax at Pace, which prepared her for the Tax LL.M. program at New York Law School. After graduating from Pace, Anna worked at JPMorgan Chase in New York as a Compliance Officer. She transitioned her compliance skills to the New York City Mayor's Office of Housing Recovery Operations, where she had an opportunity to represent a $4.2 billion dollar disaster recovery program. While working as an Assistant General Counsel at the Mayor's Office she attended New York Law School for the Tax LL.M. program. During her Tax LL.M. program, Anna drafted and presented several comments before the Internal Revenue Service regarding financial institutions and reinsurance companies, which resulted in her publishing an article in the BNA Tax Management International Journal on the history and taxation of offshore reinsurance companies. Anna is currently working at Hawkins where she provides counsel to state and local municipalities with respect to public finance transaction and bond offerings. She also advises non-profit clients on tax matters. Anna is a member of the Cornell Club and her leisure interests are fashion and drafting. She is also involved in drafting a petition regarding the student debt reform proposal with several Pace alums.

Elizabeth Feeley is the Senior Editor of Thomson Reuters' *Practical Tax Strategies*, a monthly journal that offers practical information and planning strategies related to federal tax issues. As the managing editor of *Practical Tax Strategies*, Elizabeth is responsible for soliciting and editing articles; writing recent development pieces on the latest tax news; and collaborating across several groups to ensure timely and accurate publication. She also spearheaded a quarterly special report series with Marketing, and is the media liaison for the TR journals. She has a B.A. from Binghamton University (2006), a J.D. from Pace Law School (2009), and an LL.M. from New York Law School (2011). While in law school, Elizabeth participated in the International Law Club and the Volunteer Income Tax Assistance Program. She was also an intern at Freshfields, Bruckhaus and Deringer in Budapest, Hungary. Elizabeth joined Thomson Reuters in 2012 as an Editor in Headnotes & Annotations.

Brad Lombardi is a Senior International Tax Consultant at Deloitte Tax LLP in Boston, Massachusetts. He graduated from the University of Rhode Island (B.A. 2006), Pace University School of Law (J.D. 2009) and Boston University School of Law (LL.M. 2012). While in law school, Brad served as an Articles Editor on the *Pace International Law Review* and participated in the John L. Costello National Criminal Law Trial Advocacy Competition. He studied Federal Income Tax Law with Professor Crawford, which sparked his interest in tax practice. After graduating from Pace Law in 2009, Brad volunteered with the Low Income Taxpayer Clinic in Providence, Rhode Island before joining Ginsburg & Redmond, P.C. in Hawthorne, New York as an associate attorney in 2010. In 2012, Brad earned his LLM in Taxation from BU Law and then joined Deloitte Tax's international tax group in Boston. Brad's practice involves providing tax planning advice to multinational corporations and pass-through entities, including in connection with mergers and acquisitions, global expansions, IP migrations and internal restructurings. Brad serves on the Associate Board of Generation Citizen, a civics education focused non-profit, and is an avid golfer and fan of all Boston sports teams.

Katie Lombardi is a Trust Officer with Boston Private's Trust & Fiduciary Service division in Boston, Massachusetts. She earned her Masters of Law in Taxation with an Estate Planning Concentration from Boston University (2010), her Juris Doctor from Pace Law School (2009) and her Bachelor of Science in Business Administration from Ithaca College (2006). While in law school, Katie was an Articles Editor on the *Pace International Law Review*. She worked part-time at a boutique estate planning firm for high net worth clients in White Plains and waited tables at a restaurant in Mount Kisco. Her favorite courses at Pace were Federal Income Tax and Estate & Gift Tax. After completing her LL.M., Katie practiced in White Plains as a trusts and estates attorney before convincing her husband, Brad, to move back to the home of his beloved Red Sox. She joined the Exempt Organizations Tax Group at PricewaterhouseCoopers, LLP, where she was responsible for tax compliance and reporting, primarily for educational and healthcare institutions. Katie later transitioned back to trust, estate and tax planning and administration through private multi-family wealth management office and trust company positions. Katie is a member of the Boston Bar Association, the Boston Estate Planning Council, the Boston Trusts and Estates Consortium, and the Planned Giving Group of New England. She is admitted to the bar in Massachusetts and in New York. In her spare time (haha), she enjoys traveling and spending time with Brad, Brad Jr., and family pups, Vince and Sammie.

Erin McKinney is Legal Advisor for the Indirect Tax Department at IBM in Southbury, Connecticut. She graduated from Loyola University Chicago (BA 2003) and Pace Law School (JD 2008). While at Pace, with Professor Crawford's encouragement, Erin presented her paper "Blogging: A New Third Wave Feminist Legal Method" at the Southern Connecticut State University Annual Women's Studies Conference. Erin took Federal Income Tax, Wills & Trusts, Federal Estate and Gift Taxation, and Feminist Legal Theory as a student at Pace. She started working at Grant McCarthy Group, LLC in White Plains during her 2L year, and remained there with the State and Local Tax group for 8 years before moving to IBM. Erin's work consists of reviewing customer contracts and M&A documents, along with providing general sales and use tax guidance to the business and compliance teams at IBM.

Barry Rickert is a Tax Director with PricewaterhouseCoopers LLP (PwC), based out of Stamford, CT. He graduated from Villanova University (B.A. 2002), Pace University School of Law (J.D. 2006) and Georgetown University Law Center (LL.M. 2014). While at Pace Law School, Barry was active with the Student Bar Association and Phi Alpha Delta. He took Federal Income Taxation for individuals and corporations, and Accounting for Lawyers. In addition, Barry participated in an independent study with Professor Crawford, which resulted in his tax article being published in a law journal. Barry joined PwC in 2007 and has advised large multinational corporations across various industries on tax accounting, federal, state, and international tax issues, as well as complex tax planning, transactions and restructurings. During his tenure, Barry spent two years in PwC's Washington National Tax Services practice, completing rotations in the transfer pricing, legislative & regulatory and international tax groups. Barry leads PwC Stamford's Corporate Responsibility initiatives, where he coordinates with local charitable organizations to offer financial literacy curriculum to students and educators.

Jay Scharf is an associate in the Estate Planning department at Robinson Brog Leinwand Greene Genovese & Gluck P.C. in New York City. Jay graduated from Pace University School of Law in May 2012 and received an LL.M. in Taxation from Boston University School of Law in January 2016. While in law school, Jay was a member of the Public Interest Law Center at Pace and successfully assisted defending low-income families facing home foreclosure through identifying evidence of predatory lending and negotiating loan modifications. Jay took all of Professor Crawford's tax classes at Pace and assisted Professor Crawford in preparing a scholarly article with respect to the tax implications involved with death-time human gamete transfers. Jay's practice focuses on implementing customized estate planning techniques for high net worth individuals and families. Jay achieves each client's estate planning goals in the most tax efficient manner with a focus on gift, estate and income tax. For three years, Jay was an associate in the Trusts and Estates department at Kurzman Eisenberg Corbin & Lever, LLP in White Plains, NY. Jay started his career as a law clerk at Kurzman Eisenberg. Jay lives in Brooklyn, NY with his wife and two and a half children.

Daniel Timins is an attorney and a Certified Financial Planner®. After graduating from Washington University, he worked at Merrill Lynch, American Express Financial Advisors and Alliance Bernstein Investments. Dan received his Juris Doctor from Pace Law School in 2007. Prior to graduating he worked as a legal intern at the Law Offices of Eugenia Vecchio and Associates and the Pace Investor Rights Clinic. After law school Dan entered private practice, during which time he helped draft proposed New York legislation for insurable interests (related to life insurance trusts), NY Insurance Law § 3205, and participated in submitting proposed legislation for the NY EPTL 5-1.4 (revocatory effects of divorce). Dan works closely with the Financial Planning Association of New York City and the New York Lawyer Assistance Program, and provides pro bono services to the National Multiple Sclerosis Society and New York City Family Justice Center. Dan specializes in estate planning, probate and Medicaid planning.