

# #DCEITC Forum

## The Role of the EITC in Providing a Pathway to the Middle Class in Washington, DC

December 12, 2018

10:00 AM – 2:00 PM

True Reformer Building  
1200 U St, NW, Washington, DC 20009

### Agenda

**10:00 AM - 10:30 AM:** Check-in and Networking

**10:30 AM - 10:35 AM:** Overview of the #DCEITC Forum

Joseph Leitmann-Santa Cruz, Associate Director, CAAB, and Manager of the DC EITC Campaign

**10:35 AM – 10:40 AM:** Welcoming Remarks by Rich Petersen, Executive Director, CAAB

**10:40 AM – 10:50 AM:** Welcoming Remarks by DC Councilmember Jack Evans

**10:50 AM – 11:10 AM:** What is the EITC?

Roxy Caines, EITC Campaign Director, Center on Budget and Policy Priorities

**11:10 AM – 11:25 AM:** The Federal EITC: Providing a Foundation of Support for Workers with Children

Elaine Maag, Senior Research Associate, Urban-Brookings Tax Policy Center at the Urban Institute

**11:25 AM – 11:40 AM:** Overview of the DC Local EITC

Keith Richardson, DC Deputy Chief Financial Officer, DC Office of Tax and Revenue

**11:40 AM – 12:10 PM:** Lunch

**12:10 PM – 12:15 PM:** Overview of Free Tax Preparation Services in the US and Introduction of Panel

Lee Davenport, President of the Board of Directors, CAAB

**12:15 PM – 12:40 PM:** Panel of Free Tax Preparation Service Providers

Teresa Hinze, Executive Director, Community Tax Aid

Jim Shanahan, Director, Financial Stability Network, Catholic Charities of Archdiocese of Washington

Bill McElrath, DC State Director, AARP Foundation Tax-Aide Program

Moderator: Rebecca Thompson, Project Director, Taxpayer Opportunity Network, Prosperity Now

**12:40 PM – 12:55 PM:** Federal EITC and the Taxpayer Advocate Services

Glen Thomas, D.C. Local Taxpayer Advocate, Taxpayer Advocate Service

**12:55 PM – 1:00 PM:** Remarks by John O'Brien, EVP Strategy & Public Affairs, Washington Gas

**1:00 PM – 1:05 PM:** Remarks by Robert Burns, Senior Vice President, Citi Community Development

**1:05 PM – 1:30 PM:** How Can You Be Part of the Solution? Audience Feedback and Recommendations

Facilitator: Rene Bryce-Laporte, Principal, Bryce-Laporte Information & Consulting

**1:30 PM – 1:35 PM:** Closing Remarks by Stephen Taylor, Commissioner, DC Department of Insurance, Securities and Banking

**1:35 PM – 1:45 PM:** Call to Action re DC EITC Campaign by Joseph Leitmann-Santa Cruz, Associate Director, CAAB

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DC Councilmember Jack Evans: [@JackEvansWard2](#)

Roxy Caines: [@CenterOnBudget](#)

Elaine Maag: [@TaxPolicyCenter](#)

Keith Richardson: [@DC\\_OTR](#)

Lee Davenport: [@davenportlee](#) / [@CAAB\\_GreaterDC](#)

Teresa Hinze: [@TeresaHinze](#) / [@CommTaxAidDC](#)

Jim Shanahan: [@CCADW](#)

Bill McElrath: [@AARPDC](#) / [@AARPFoundation](#)

Moderator: [@ProsperityNow](#)

Glen Thomas: [@YourVoiceAtIRS](#)

John O'Brien: [@washingtongas](#)

Robert Burns: [@Citi Community Development](#)

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