ADVOCACY and the NAEA PAC: Making Your Voice Heard Where It Counts
ADVOCACY is the Heartbeat of NAEA

NAEA spends much time meeting with and educating members of Congress about the issues important to enrolled agents.

- NAEA Board of Directors
- Executive Leaders
- Member Volunteers
- Government Relations Committee
- Legislative Counsel
- Government Relations Team
NAEA ADVOCACY

• NAEA has a well-earned reputation as a thought leader in tax policy, tax administration, and a champion for enrolled agents.

• Seeks solutions to problems to promote and protect the rights of enrolled agents.

• Ensures your voice is heard on the essential role of enrolled agents in the tax administration process.

• Provides a platform to educate legislators and policymakers and to participate in the democratic process.
NAEA ADVOCACY: New Pathways for Significant Improvements in Tax Administration

- NAEA recommendations in IRS Taxpayer First Act Report to Congress
- Advocating to extend the 2020 filing season deadline
- Taking the lead advocating for regulating unenrolled tax return preparers
- Making a case for increased IRS funding
- Ensuring the success of Tax Pro Accounts to deploy real-time processing of POAs and 8821s
- Fixing the phone lines, transcripts, and more...
- Making the hard call that “IRS is Broken”
NAEA ADVOCACY: Action for a More Workable IRS

• NAEA’s dedication to assisting enrolled agents and taxpayers is the ability to directly influence the tax filing process.

• NAEA advocacy led to introduction of the Taxpayer Protection and Preparer Proficiency Act, which would allow the Treasury to regulate the practice of tax return preparers.

• IRS funding and the modernization of their systems and technology is a top priority.
2022 ADVOCACY POLICY PRIORITIES

• Regulation of tax preparers
• Funding the IRS
• Fixing the IRS’s broken system
• Resolving complex state regulation of enrolled agents
Shoulder-to-shoulder with ADVOCACY is the NAEA PAC

The NAEA PAC is a powerful tool for supporting candidates aligned with NAEA’s policy agenda, engaging enrolled agents in our advocacy work, and increasing member involvement and recognition.
What is the NAEA PAC?

• National Association of Enrolled Agents Political Action Committee, established in 2006.
• Voluntary political fund used to support candidates or initiatives important to enrolled agents.
• 100% of member contributions support candidates or initiatives.
• Effective vehicle for members to participate in the political process.
• Key resource in the relationship building process with elected officials.
Why was the NAEA PAC formed?

• By law, associations – like NAEA – are prohibited from providing direct political support to candidates in the form of corporate dollars to fund federal elections.

• Federal and state election commissions allow political action committees (PACs) to be used as a means of providing individuals who share common interests a way to leverage their financial support for candidates they support.

• The dollars used to fund candidate campaigns come from an organization’s members, not from the organization itself.
Contribution Limits for Federal Elections

• Individuals may contribute up to $5,000 to a PAC in a calendar year.

• A PAC may give $5,000 to each candidate or candidate committee per election.
  • $5,000 for a Primary election
  • $5,000 for the General election
Benefits of the NAEA PAC

• Member involvement and recognition.

• Demonstrate NAEA is a visible player in the political arena.

• Make a difference in public policy debates by being part of a collective voice.

• Play a prominent role in advocacy successes through interactions with members of the Senate Finance Committee and House Ways and Means Committee on issues important to enrolled agents and the industry.
Since 2006, more than 1,800 NAEA enrolled agents have made their voices heard through the NAEA PAC with voluntary contributions of $930,000.

During a typical two-year election cycle, 300-400 members participate in the PAC.

2017-2018 was the most successful two-year cycle for PAC fundraising with member contributions exceeding $248,000!
Impact of COVID-19 Limitations

COVID-19 limitations forced NAEA to cancel in-person meetings, conferences, and the annual Congressional Fly-In – primary sources of educational meetings with members of Congress, networking, and peer-to-peer PAC fundraising. NAEA PAC participation declined significantly.

- 2021: Fewer than 100 members participated in the PAC with contributions of $35,700.
NAEA PAC and the 2022 Midterm Elections

• Essential to ensure that members of Congress understand the importance of enrolled agents to our tax system.

• NAEA PAC participation plays a significant role in our ability to support election campaigns in the November elections.
  • 36 members of the House Ways and Means Committee
  • 9 members of the Senate Finance Committee
Contributing to the NAEA PAC is EASY!

Sign in to your NAEA account – Go to the NAEA PAC Website
Contributing to the NAEA PAC is EASY!

- Follow instructions to **Contribute to NAEA PAC**
- **Member Information:** First Name, Last Name, Street, City, State, Zip, Home Phone, Employer, Occupation
- **Personal Credit Card Information:**
  - Choose **Amount ($)** to contribute
  - **Recurrence** (dropdown menu)
    - One-time
    - Monthly
    - Quarterly
    - Yearly
  - Card Number, Billing First Name, Billing Last Name, Billing Zip
  - Card Expiration Date: Month, Year, CVV
- **Check box:** I’m not a robot
- **SUBMIT**
Work That Makes Lasting Change

- Meetings with members of Congress.
- Showcasing the role enrolled agents play in tax administration.
- Illustrating the need for changes in policy.
- Connections members of Congress have with enrolled agents will affect legislative actions for years to come.
THANK YOU! NAEA PAC PARTICIPANTS

Congressional Club
($1,000 +)
Bernadette Antonelli
Tony Frezza
Thomas Gorczynski
Robert Hartmann
Ann Katherine Hubbard
Raymond Kidwell
Phyllis Jo Kubey
Nancy Lyman
Jennifer MacMillan
Anthony Malki
Anita Manuel
Twila Midwood
Bill Nemeth
John M. Perry III
L. Raymond Rosenbach
Donald Rosenberg
Edward Ryan
Mary Sunderland
David Tolleth

Board of Directors Club
($250 - $499)
Talal Annouz
Marilyn Brodeur
Kathy Brown
Margaret Brown
Leslie Casteel
Teresa Coleman
Linda Cosgray
Marc Dombrowski
Trish Evanstad
Kerry Freeman
Luis Garduno
Tracey Ann Gordineer
Henry Grabkowitz
Edward Gunnell
Sheila Hayward
John Horell
Lynn Jacobs
Robert Krim
Melanie Levno
Jacob Lewis
Michelle McCaughey
Rosemary McMahon
Matthew Meacham
Bruce Miller
Karin G Nelson
Daniel Paoloiti
Jacquelyn Payne
Jay Shah
Terry Veevers
Matthew Wright

Committee Chairs Club
($100 - $249)
Roger Alvais
Priscilla Bailey
Susan Bladorn
Stephen DeFilippis
Junhui (Jack) Ding
Sharry Doyle
William Farmer
JoAnne Giacalone
Carrie Houchins-Witt
Barbara Kaumo
Maria Mak

Contributors
(Under $100)
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Diana Buskirk
Virginia Fell
Cynthia Fickley
Gary Grab
Helen Lim
Dianne May
Matthew Metras
Nicole Piehl
Allan Reynolds
Carole Thompson
Lori Whittaker
Richard Wright

2021 – 2022

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Gertrude Schweiger
Linda Senke
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Annual Solicitation Campaign Starts May 2022

- Show your support for NAEA’s advocacy priorities.
- Make your voice heard where it counts with a contribution to the NAEA PAC.