

Improving Access to State Tax Credits through Research to Action

Speaker Biographies

Opening Remarks and Keynote

Brooke Lierman is the 34th Comptroller of the state of Maryland and the first woman to be independently elected to one of our state's constitutional offices. After running a strong, policy-focused and grassroots-led two-year campaign, she was elected with over 60% of the vote in November 2022. She is an attorney by training, practicing as a civil rights and disability rights lawyer for many years, and prior to her election as Comptroller, she served for eight years as a member of the House of Delegates representing part of Baltimore City. While in the House, she spent time in leadership roles on both the Appropriations Committee and the Environment and Transportation Committee and chaired the Joint Committee on Pensions. Brooke successfully passed landmark legislation on a range of issues from transit and broadband to criminal justice reform and public education. As Comptroller, she is leading an agency of 1,200 dedicated Maryland public servants in 12 offices around the state. Together and under her leadership, the office is working to create a Maryland that is more equitable, more resilient, and more prosperous so that all Marylanders can reach their full potential. Brooke grew up in Montgomery County and graduated from Dartmouth College. After participating in the AmeriCorpsVISTA program, working on several federal campaigns, and spending a year at the Center for American Progress, Brooke attended the University of Texas School of Law and then moved to Baltimore for a federal clerkship. Brooke lives in downtown Baltimore with her husband and two school-aged children who attend Baltimore City Public Schools. She is a lifelong Orioles fan.

Sarah Rosen Wartell is the third president of the Urban Institute since its founding in 1968. Urban is a nonprofit research organization with hundreds of staff working to provide data and evidence to accelerate solutions and create a future where every person and every community has the power and opportunity to thrive. It serves as a trusted source for changemakers who seek to strengthen decisionmaking, create inclusive economic growth, and improve the well-being of families and communities. Urban has delivered facts that inspire solutions, and this remains our charge today. Before joining Urban, Wartell was the founding chief operating officer and then executive vice president of the Center for American Progress, where her work focused on the economy and housing markets. She also served as deputy assistant to the president for economic policy and deputy director of the White House National Economic Council. At the US Department of Housing and Urban Development from 1993 to 1998, Wartell advised the federal housing commissioner on housing finance, mortgage markets, and consumer protection. She was later a consultant to the bipartisan Millennial Housing Commission. Before her government service, Wartell practiced law with the Washington, DC, firm Arnold & Porter. Wartell serves on the boards of Enterprise Community Partners and is a former board member of Georgetown Day School. She is also a member of the steering committee for the 10-year Roadmap for Public Housing Sustainability, executive board of the

National Academy of Public Administration's Center for Intergovernmental Partnerships, and Bank of America's National Community Advisory Council. Her areas of expertise include community development, consumer finance, asset building, and housing finance. Wartell has an AB with honors in urban affairs from the Princeton School of Public and International Affairs, a JD from Yale Law School, and an honorary doctorate of public service from the University of Maryland, Baltimore County.

Presentation

Luisa Godínez-Puig is a senior research associate in the Race and Equity Division and a former equity scholar at the Urban Institute. Before joining Urban, she worked as a doctoral fellow at the Initiative on Cities and the Center for Antiracist Research (both at Boston University), she was a consultant for the City of Boston, and she was a research consultant at the Inter-American Development Bank and the Organization of American States in Washington, DC. Her work has been published in *Urban Affairs Review*, *Public Health Reports*, *Ethnopolitics*, and the *Monkey Cage* blog of the *Washington Post* and by the Brookings Institution and the Joint Center for Housing Studies of Harvard University. Godínez-Puig's work focuses on two interconnected areas of research, both centered on racial and ethnic justice. The first is on how state and local policies affect racial equity. The second centers on financial well-being for immigrant communities, particularly the role that tax benefits and financial inclusion play in underserved communities. Godínez-Puig holds a doctorate and a master's degree in political science from Boston University, a master of laws degree from the University of Chicago, and a law degree (juris doctor equivalent) from Universidad Nacional Autónoma de México.

Panel Discussion

Pablo Blank, MA, EML, joined CASA in 2013 and currently serves as the Director of Immigrant Integration. He oversees CASA's citizenship, financial education, and free tax preparation programs across Maryland, Pennsylvania, Virginia, and Georgia. Under his leadership, CASA has supported more than 7,000 Legal Permanent Residents in becoming U.S. citizens; guided 4,000 newly eligible immigrants in obtaining Maryland driver's licenses; and prepares over 1,500 tax returns annually for low-income families through four VITA sites—expanding access to federal and state EITC, CTC, and other tax benefits for taxpayers who face barriers such as limited English proficiency, limited familiarity with the tax system, and low trust in service providers. Before joining CASA, he served as Program Director at Identity, Inc., and coordinated Cultural, Environmental, and International Cooperation initiatives at the Embassy of Argentina in the United States. In Argentina, he worked in roles including marketing at Coca-Cola Andina and strategic planning at "Ferrocarril General Belgrano," and he taught "Argentine Political Economics" at the university level. Mr. Blank has served on the Maryland Comptroller's New Americans Advisory Council and is currently a member of the IRS Advisory Council. He is a Better Arguments Ambassador (Aspen Institute) and has been appointed twice to Montgomery County's Committee Against Hate/Violence, which he now chairs. He received the 2009 Argentine Social Ambassador Award from the Help Argentina Foundation and is a 2019 CORE Leadership Montgomery graduate. Pablo holds a Bachelor's in Business Administration, a

Master of Arts in Sustainability and Corporate Social Responsibility, and an Executive Master's in Leadership from Georgetown University. He lives in Rockville, Maryland, with his spouse and child.

Aravind Boddupalli is a senior research associate in the Urban-Brookings Tax Policy Center, where he examines federal, state, and local tax and budget issues. His research focuses on racial income and wealth disparities, access to tax benefits, government outreach and engagement, and criminal legal fines and fees. Boddupalli is a Rising Leaders for Results Fellow with the Annie E. Casey Foundation. He also serves on the Fines, Fees, and Restitution working group of Baltimore City's Criminal Justice Coordinating Council. Boddupalli graduated summa cum laude from the University of Minnesota Twin Cities with a BA in economics and political science.

Simone Brody is a senior advisor with the New Practice Lab whose career spans the nonprofit, public, and private sectors. She is focused on measurably improving opportunities for individuals and families through an outcome and evidence-based approach, and developing high performing teams to deliver outcomes. Simone previously served as a Senior Advisor on the White House American Rescue Plan Team, supporting economic relief efforts. She was the Executive Director of What Works Cities, a Bloomberg Philanthropies initiative working with local governments to improve outcomes for residents through data driven, resident centered governance. She led evaluation and accountability for the New York City Department of Education and began her career in finance, first in investment banking at Goldman Sachs and then at Ascend Ventures, supporting early-stage education and technology companies. Simone earned a BA, Master of Education and MBA from the University of Pennsylvania.

Congressman Steny H. Hoyer is the most senior member of the House Democratic Caucus, serving the House of Representatives for forty-four years. In the House, Congressman Hoyer served as Deputy Majority Whip from 1987 to 1989, Chair of the Democratic Caucus from 1989 to 1995, House Democratic Whip first from 2003 to 2007 and from 2013 to 2019, and then House Majority Leader between 2007 and 2011 and again between 2019 and 2023. He is the Ranking Member of the House Appropriations Financial Services and General Government (FSGG) Subcommittee and currently serves on the Legislative Branch, Labor, Health, and Human Services, Education, and Related Agencies Subcommittees as well. In Maryland's Fifth Congressional District, he is a tireless fighter for economic development and a leader in creating jobs. Through the Make It In America plan he launched in 2010, Congressman Hoyer has spearheaded efforts to invest in creating new opportunities for businesses, workers, and families in Maryland and across the country. Congressman Hoyer shepherded the Americans With Disabilities Act (ADA) to overwhelming approval in the House in 1990 and led the effort to pass the ADA Amendments Act, which allows millions of Americans with disabilities to benefit from the ADA's original intent of inclusion in 2008. Congressman Hoyer also is a widely respected voice on foreign policy and international affairs. As the former Chair and Ranking Democrat on the Commission on Security and Cooperation in Europe (the Helsinki Commission), he championed the cause of human rights, individual freedoms, democracy and religious liberties throughout the world. A staunch advocate for supporting America's democratic allies abroad, Congressman Hoyer has been a steadfast supporter for aiding Ukraine in the wake of Russia's annexation of Crimea in 2014 and subsequent invasion of Ukraine in February 2022. Congressman Hoyer has also worked tirelessly to strengthen the crucial U.S.-Israel relationship and to maintain Congress' overwhelming bipartisan support for Israel throughout his career in Congress. Prior to beginning his tenure in the House,

Congressman Hoyer served in the Maryland State Senate. He was elected as President of the Senate and served in that body until 1978. He was a member of the State Board of Higher Education from 1978 to 1981, the year in which he came to Congress after winning a special election. Congressman Hoyer currently serves on the St. Mary's College Board of Trustees. He is also a former member of the Board of Regents of the University System of Maryland and the United States Naval Academy Board of Visitors. He received his law degree from Georgetown University Law Center in 1966. That same year, at the age of 27, is when he won a seat in the Maryland Senate. Congressman Hoyer and his late wife, Judith Pickett Hoyer, have three daughters, three grandchildren, and three great-grandchildren. In 2023, Congressman Hoyer married Dr. Elaine Kamarck – Senior Fellow in Governance Studies and Director of Center for Effective Public Management at the Brookings Institution.

Robin McKinney is Co-Founder and CEO of the CASH Campaign of Maryland, a nonprofit that improves the financial security of low-to-moderate income Marylanders. The CASH Campaign of Maryland is the result of a recent merger between the Baltimore CASH Campaign and the Maryland CASH Campaign. CASH and its statewide network of partners annually prepares 20,000 free tax returns, bringing in \$30 million in tax refunds to low-income taxpayers, provides free financial education and coaching to over 7,000 residents, and conducts advocacy on state and federal policies. For the past 16 years, Robin has worked in the field of asset building, engaging in fundraising, advocacy, and program and coalition management, including for the Annie E. Casey Foundation and East Harbor CDC. She has a BSW from Elizabethtown College and a MSW from the University of Maryland, Baltimore School of Social Work, where she co-founded the Financial Social Work Initiative and is currently a CPE instructor. Robin is a board member of Prosperity Now (formerly CFED), and a member of Maryland's Financial Education and Capability Commission.