Complex Families and Complex Taxes: How Has Growing Complexity in Families Made the Tax Filing Process More Complicated?

Speaker Biographies

Francesca Jean Baptiste is the senior program manager at the Maryland CASH Campaign. She provides training and technical assistance to the campaign’s volunteer income tax assistance partners statewide. She received her JD from Washington and Lee School of Law with a concentration in tax law. She is currently working towards her LLM in taxation at the University of Baltimore.

Elaine Maag is a senior research associate in the Urban-Brookings Tax Policy Center at the Urban Institute, where she studies income support programs for low-income families and children. Before joining Urban, Maag worked at the Internal Revenue Service and Government Accountability Office as a Presidential Management Fellow. She has advised congressional staff on the taxation of families with children, higher education incentives in the tax code, and work incentives in the tax code. Maag codirected the creation of the Net Income Change Calculator, a tool that allows users to understand the trade-offs between tax and transfer benefits, and changes in earnings or marital status. Maag holds an MS in public policy analysis from the University of Rochester.

Nina E. Olson, the national taxpayer advocate, is the voice of the taxpayer at the IRS and before Congress. Under her leadership, the Taxpayer Advocate Service helps hundreds of thousands of taxpayers every year resolve problems with the IRS and addresses systemic issues affecting groups of taxpayers. Her annual report to Congress identifies the most serious problems facing taxpayers and recommends solutions. In 2015, Congress codified the provisions of the Taxpayer Bill of Rights, for which Olson had long advocated, grouping the dozens of existing rights in the Internal Revenue Code into 10 clear categories and requiring the IRS Commissioner to ensure employees act in accordance with those rights. Olson is a graduate of Bryn Mawr College and North Carolina Central School of Law, and she holds a Master of Laws degree in taxation from Georgetown University Law Center.

H. Elizabeth Peters is the director of the Center on Labor, Human Services, and Population at the Urban Institute. An economic demographer, her research focuses on family economics and family policy, specifically examining the effects of public policies such as divorce laws, child support policy, child care policy, taxes, and welfare reform on family formation and dissolution; inter- and intra-household transfers; father involvement; and family investments in children. She recently completed a program project grant funded by the National Institute of Child Health and Human Development (NICHD) on the transition to fatherhood and is currently coprincipal investigator on an Administration for Children and Families project that examines innovative practices involving fathers in home visiting programs. Before joining Urban, Peters was a professor in the Department of Policy Analysis and Management at Cornell University and the founding director of the Cornell Population Center. From 1993 to 2004, she was a partner in the NICHD-funded Family and Child Well-being Research Network, where she directed the network’s fatherhood efforts. She was also a member of the steering committee that guided the Federal Interagency Forum on Child and Family Statistics’ Nurturing Fatherhood initiative. Peters’ work has appeared in peer-reviewed journals such as the American Economic Review, Journal of Human Resources, and Demography. She coedited Marriage and Family: Perspectives and Complexities, published by Columbia University Press in 2009. Peters earned her MPP and her PhD in economics from the University of Chicago.
Sarah Rosen Wartell became the third president of the Urban Institute in February 2012. A public policy executive and housing markets expert, she was deputy assistant to the president for economic policy and deputy director of the National Economic Council. At the US Department of Housing and Urban Development from 1993 to 1998, she advised the federal housing commissioner on housing finance, mortgage markets, and consumer protection. In 2012, she was named a “Woman of Influence” by HousingWire. Wartell cofounded the Center for American Progress, serving as its first chief operating officer and general counsel. Later, as executive vice president, she oversaw its policy teams and fellows. Her work focused on the economy and housing markets, and she directed the Mortgage Finance Working Group and "Doing What Works" government performance program. She previously practiced law with the Washington, DC, firm Arnold & Porter and was a consultant to the bipartisan Millennial Housing Commission. Wartell currently serves on the boards of the Low Income Investment Fund, Center for Law and Social Policy, and Center for Urban Science and Progress at New York University. She is also a Penn Institute for Urban Research Scholar. Her areas of expertise include community development, consumer finance, asset building, and housing finance. Wartell has an AB degree with honors in urban affairs from Princeton University's Woodrow Wilson School of Public and International Affairs and a JD degree from Yale Law School.

David Williams leads and drives growth in Intuit’s tax businesses—including TurboTax, the largest do-it-yourself tax software solution in the United States—and Intuit’s professional products that are used by tens of thousands of tax practitioners. He also works with other Intuit businesses to shape their strategies, engage with external stakeholders and partners, and support industry initiatives. Before joining Intuit, Williams had a long career in tax policy and tax administration on Capitol Hill and at the IRS. He served 14 years as a US Senate staffer, working primarily on tax issues for the Senate Budget Committee and for Senator Bill Bradley. During his 13 years at the IRS, he was chief communications officer, director of the earned income tax credit office, director of electronic tax administration and director of the return preparer office. Williams holds a BS in business administration from Colorado State University and an MPP from the John F. Kennedy School of Government at Harvard University.