# Biographies of Speakers

## *Public Sector*

***Honorable Kevin Brady***
***House Committee on Ways and Means***

Kevin Brady is a pro-family, pro-small business conservative representing the 8th District of Texas in the U.S. House of Representatives.

Kevin holds key leadership posts in Congress including Deputy Whip and Chairman of the Joint Economic Committee. He is a senior member of the House Ways & Means Committee - - considered by many to be the most powerful committee in Congress with jurisdiction over taxes, health care, Social Security, Medicare, international trade and welfare.

As a champion of free enterprise and American-made energy, Kevin's focus is creating jobs, reducing Washington spending and sunsetting obsolete federal agencies.

Kevin is the chairman of the influential Health Subcommittee for the House Ways and Means Committee. As chairman, he will focus on ensuring a strong, free market in the nation's health care industry and look for ways to increase the quality of health care, while keeping costs low.

On the Social Security Subcommittee, Kevin is fighting to preserve this important program for future generations once and for all.

And as chairman of the Joint Economic Committee, he has been a GOP leader on economic issues – opposing the President's stimulus and fighting White House efforts to raise taxes on families, small businesses and American energy producers.

Until 2013, Kevin was the leader of the Trade Subcommittee and led the successful effort to pass new sales agreements with Panama, South Korea and Colombia – and he served as the White House point man on the successful passage of the Central American Free Trade Agreement.

Prior to his election to Congress, Kevin worked as a chamber of commerce executive for 18 years and served six years in the Texas House of Representatives where he was named one of the Ten Best Legislators for Families & Children. In 1994 he was named one of Five Outstanding Young Texans.

Kevin is an original Hometown Hero of The Woodlands, a Paul Harris Fellow in Rotary and a Distinguished Alumni of the University of South Dakota. He and his family attend Saints Simons and Jude Catholic Church.

**ACHIEVEMENTS**

Congressman Brady's major legislative accomplishments include:

- Restoring the federal sales tax deduction which saves Texas taxpayers over $1 billion a year.
- Passing new trade agreements that have created new sales and thousands of new jobs for Texas workers in manufacturing, agriculture and technology
- Passing the Teacher Liability Protection Act to protect teachers against frivolous lawsuits when they maintain order and discipline in the classroom.
- In the wake of 9-11, establishing a national network of university homeland security research centers to prevent and respond to future terrorist attacks, including the center at Texas A & M.
- Championing the Federal Sunset Act which forces agencies and programs to regularly prove their value to taxpayers or face elimination.
- Authoring the MAP Act which President Reagan's former budget director lauded for its "smart spending caps and innovative guardrails."
- Helping create the Texas Institute of Genomic Research, a cutting-edge research center that will accelerate new medical discoveries and create 5,000 new Texas jobs.
- Spearheading House efforts on Hurricane recovery in the wake of Rita and Ike.

**AWARDS**

In Congress, Kevin has been repeatedly named Hero-of-the-Taxpayers, Small Business Champion and Super-Friend of the Seniors. He has received the Golden Bulldog Award by Watchdogs of the Treasury, special recognition by Citizens Against Government Waste, and is a perennial winner of the Guardian of Small Business, Taxpayer Hero and Spirit of Enterprise awards.

Kevin has been honored as Outstanding Texas Political Leader-of-the-Year and Deep East Texas Legislator-of-the-Year and was recently named as having one of the Top Five Spending Cut Agendas on Capitol Hill.

***Ryan Abraham***
***Senior Tax Counsel***
***Majority Staff***
***Senate Committee on Finance***

Ryan is Senior Tax and Energy Counsel on the Democratic Staff of the Senate Finance Committee. Under the leadership of Chairman Ron Wyden, Ryan handles the taxation of energy, transportation, bonds, real estate, and economic development tax issues. Ryan started on the Committee in 2004 as the Tax Research Assistant. He attended Dartmouth College and then law school at night at American University Washington College of Law.

***Curtis E. Beaulieu***
***Tax Counsel. Minority Staff***
***Senate Committee on Finance***

Curt Beaulieu serves as Tax Counsel on the minority staff of the Senate Finance Committee, focusing on energy, natural resources, estate, and gift taxes. Prior to joining the Senate Finance Committee, Curt worked as Tax Counsel in the Office of Senator Orrin G. Hatch. He has worked for several members of Congress, including the former Ranking Member of the Ways and Means Committee, Congressman Jim McCrery. Curt received a B.S. from the University of Texas at Austin; J.D. from California Western School of Law; and his LL.M in Taxation from Georgetown University School of Law. He became a member of the State Bar of Maryland in 2006.

***Craig Gerson***
***U.S. Treasury Department***

Craig Gerson is an Attorney Advisor for the Office of Tax Legislative Counsel at the U.S. Department of the Treasury specializing in partnership taxation issues. Prior to joining Treasury, Craig was a Principal in the Mergers and Acquisitions group of PwC's Washington National Tax Practice. At PwC, Craig advised clients on the use of partnerships in a wide array of domestic and cross-border transactions. Craig had previously worked as an Attorney-Advisor in the Passthroughs Division of Chief Counsel.

Craig has authored articles that have appeared in numerous publications, including Practising Law Institute, Tax Notes, and Journal of Taxation, and is a frequent speaker at tax conferences. Craig also instructs the Taxation of Partnerships class for the LL.M. program at the Georgetown University Law Center.

Craig received his B.A. in English from Northwestern University, his J.D. from University of California – Davis, and his LL.M. from the Georgetown University Law Center. Craig is admitted to practice law in Washington D.C. and California.

***Curtis G. Wilson***
***Internal Revenue Service***

Curt Wilson serves as Associate Chief Counsel of the Passthroughs & Special Industries Division of the Internal Revenue Service. As Associate Chief Counsel, Mr. Wilson oversees a staff of more than 70 attorneys in carrying out the Division's published guidance program in cooperation with the Department of Treasury Office of Tax Policy, providing legal advice to the Internal Revenue Service and providing tax litigation support to IRS Chief Counsel Field attorneys and the Tax Division of the Department of Justice.

Mr. Wilson holds a Masters of Law in Taxation from Georgetown University (1988), a J.D. from the University of South Dakota (1977) and a B.A. from Augustana College (1974). He joined the Office of Chief Counsel in 1983, and has served in his current position since 2008.

***Rep. Kenneth L. Weyler***
***New Hampshire***
***House of Representatives***

Kenneth L. "Ken" Weyler is a Republican member of the New Hampshire House of Representatives, representing Rockingham 13. He was elected in a January 2010 special election to replace Don Van Patten. He had served in the House previously, representing Rockingham 8 from 1990 to 2008. Rep. Weyler serves on the House Finance Committee and was the Chair of the Committee in the 2011-2012 session. He has been an assistant minority leader in the House; and a chair of the Kingston, New Hampshire Planning Board.

Rep. Weyler also serves as the Public Chair of the Tax and Fiscal Policy Task Force of the American Legislative Exchange Council (ALEC).

Rep. Weyler earned his B.S. from the Massachusetts Institute of Technology. His professional experience includes working as first officer, captain, and pilot for American Airlines. He was an officer pilot in the United States Air Force, and an officer in the United States Air Force Reserve.

## *Private Sector*

***Linda E. Carlisle***
***Miller & Chevalier Chartered***

Linda E. Carlisle practices international and domestic tax law, concentrating on the taxation of corporations, corporate reorganizations and flow-through entities, such as partnerships, limited liability companies and Subchapter S corporations. She also focuses on Public-Private Partnerships (or PPPs) and infrastructure transactions, and is one of the foremost practitioners in this area. In addition, Ms. Carlisle assists clients with employee stock ownership plans (ESOPs), intercompany pricing issues, financial derivative product issues, and legislative, regulatory and administrative tax matters.

Ms. Carlisle is a leading authority on compliance issues related to the U.S. Foreign Account Tax Compliance Act (FATCA) and has extensive experience helping sovereigns negotiate intergovernmental agreements (IGAs) with respect to FATCA.

Ms. Carlisle advises on acquisitions and divestments of U.S. companies and businesses and in the establishment of finance structures and holding companies. She assists clients in structuring hybrid financial instruments and in devising and defending transfer pricing.

She has testified before the U.S. Congress, obtained advance tax rulings approving proposed transactions, achieved favorable administrative and judicial resolutions of tax adjustments proposed by the Internal Revenue Service (IRS), obtained refunds of overpaid U.S. tax and successfully contested proposed foreign tax adjustments through tax treaty provisions ("competent authority" proceedings).

Before joining Miller & Chevalier, Ms. Carlisle was a Tax Partner in the Washington, D.C. office of White & Case and Cadwalader, Wickersham & Taft. She was in government service with the U.S. Department of the Treasury as an Attorney-Advisor in the Office of the Tax Legislative Counsel, and as the Special Assistant to the Assistant Secretary for Tax Policy. While at the Treasury Department, Ms. Carlisle advised senior Treasury, White House and congressional officials on domestic and international issues examined in the enactment of the Tax Reform Act of 1986. Ms. Carlisle is a frequent and sought after speaker on domestic and international tax issues

***Lauren Culbertson***
***Story Partners***

Lauren is a Director at Story Partners, where she works with national media outlets on a daily basis as well as provides media relations support and develops communications strategies for clients. Prior to joining Story Partners, Lauren worked in the U.S. Senate as the deputy communications director and press secretary for Sen. Johnny Isakson of Georgia.

While working on the Hill, Lauren was elected Vice President of the Senate Press Secretaries Association and served on the group's board for two years.

A native of Atlanta, Lauren graduated magna cum laude from University of Georgia with a Bachelor of Arts in Journalism.

***Scott Dillow***
***PricewaterhouseCoopers LLP***

Scott is a Tax Partner in PwC's National Master Limited Partnership ("MLP") practice in Dallas, where he focuses exclusively on issues facing publicly traded partnerships ("PTPs"). Scott has significant experience in capital transactions, including asset acquisitions and public offerings. Scott works with partnerships seeking access to public capital markets to identify issues and structure transactions appropriately. In this capacity, Scott provides clients with insight into the economic and tax costs of public transactions and planning for future compliance obligations.

Prior to joining the MLP Practice, Scott was a Director in the Mergers & Acquisitions group of PwC's Washington National Tax Services ("WNTS") office. In that role, Scott consulted on various partnership issues including capital transactions, acquisition integration, partnership allocations, debt workouts, and equity compensation structuring. Scott began his career in PwC's Houston office working in the Energy & Utilities sector. In Houston, Scott advised clients across a wide spectrum of the energy industry, including Fortune 500 companies, privately held organizations, private equity firms, mining entities, exploration and production ("upstream") ventures, transportation ("midstream") partnerships, and refining ("downstream") operations.

Scott is a Certified Public Accountant licensed in Texas and the District of Columbia, and a member of the AICPA

***Jeff Erickson***
***Ernst & Young***

Jeff Erickson, based in Washington, DC, is a principal in the Joint Ventures and Partnerships group in Ernst & Young's National Tax Office. Jeff works extensively in the MLP, private equity and international space across a broad spectrum of industries, including medical, pharmaceutical, real estate, and oil and gas. His current clients include various publicly traded partnerships, including Magellan Midstream Partners, LP; Rose Rock Midstream, LP; SemGroup Energy Partners, LP; Sprague Resources, LP; Global Partners, LP; Lehigh Gas Partners; Carlyle Group; and many others.

Jeff was an Assistant Branch Chief in the IRS Chief Counsel's office for Passthroughs. Jeff has given many speeches and presentations to Bar Associations and other tax groups (including the National Association Publicly Traded Partnerships) on a number of partnership tax issues, covering such topics as drafting and reviewing partnership agreements, the basics of MLPs, and the interaction of the so-called intangible anti-churning rules and the partnership tax rules. Jeff has also written articles on various topics, including the allocation of partnership debt, the conversion of partnerships, and the at-risk rules.

Jeff is an adjunct professor in the LLM program at Georgetown University Law School, teaching the basic partnership tax course.

***Deborah A. Fields***
***KPMG LLP***

Debbie Fields is the Partner-in-Charge of the Pass-through Group for KPMG's Washington National Tax Practice. The Pass-through Group is responsible for providing advice to KPMG professionals and clients regarding the federal taxation of partnerships, real estate investment trusts, and S corporations across all major industries. In addition, the Pass-through Group advises on specialty areas such as like-kind exchanges, oil and gas, leasing, and excise taxes. Client services include transaction structuring, the issuance of opinions, and requesting private letter rulings.

Ms. Fields frequently advises many of the firm's largest clients about tax planning for partnership transactions, debt restructurings, and like-kind exchanges. She has been significantly involved with KPMG's proprietary software which calculates and maintains client allocations under section 704(c) and basis adjustments under section 743(b) and section 734(b) for large private and public partnerships. She is also responsible for instructing the firm's seminars in the taxation of partnerships, like-kind exchanges, and real estate transactions.

Ms. Fields joined KPMG in 1988. Ms. Fields worked in KPMG's Washington D.C. office where she provided both audit and tax services to clients prior to joining Washington National Tax in 1996. She has extensive experience in managing client engagements, analyzing, and evaluating relevant financial data, providing research and consulting services, and preparing and reviewing federal and state tax returns for partnerships and their partners. Ms. Fields also had primary responsibility for recruiting tax department professionals.

Ms. Fields received her B.S.B.A. degree from Georgetown University, 1988. She is a member of the American Institute of Certified Public Accountants and the Virginia Society of Certified Public Accountants. She also served as chair of the AICPA Partnership Taxation Technical Resource Panel. Ms. Fields is a frequent lecturer and writer on partnership tax matters.

***Andrew P. Fimka***
***Story Partners***

Andrew Fimka, Vice President at Story Partners, is a public affairs and political operations professional with full-cycle project management experience in issues management, strategic communications, grassroots mobilization and coalition development.

Prior to joining Story Partners, Andrew served as director of political and legislative advocacy for the National Federation of Independent Business (NFIB) – the nation's leading association representing small and independent businesses. Working at the crossroads of business, politics and policy, Andrew led NFIB's issue advocacy and political communications campaigns that successfully targeted grassroots activists, as well as policy stakeholders.

Andrew is a graduate of the University of Hartford and holds a Master's degree in Legislative Affairs from the George Washington University's Graduate School of Political Management.

***Kyle Isakower***
***American Petroleum Institute***

Kyle Isakower serves as Vice President for Regulatory and Economic Policy at the American Petroleum Institute, the primary national trade association for America's oil and natural gas industry. In this role, Mr. Isakower manages API's establishment of tax policies and the development of economic analyses in support of advocacy and outreach efforts. He also oversees API programs that review proposed environmental rules and advocate for reasonable regulations, develop industry standards for use domestically and abroad, and create statistical products of value to industry and markets.

Mr. Isakower possesses 28 years of energy and environmental policy experience including work in consulting and government positions. In addition to his current areas of expertise, in his 19 years with API he has overseen API's climate policy development, and served as an advocate on behalf of the oil and gas sector regarding waste management and remediation, ambient air quality standards and air toxics issues.

Mr. Isakower holds an MS in Earth Science from Adelphi University and a BS in Biology-Geology from the University of Rochester.

***Nathan Klein***
***Paragon Insights***

Nathan Klein is a Principal with Paragon Insights where he leads the public opinion polling operation. Nathan is currently serving as an advisor on polling and analytics to the National Republican Senatorial Committee (NRSC). In 2012, Nathan acted as the Deputy Polling Manager to the Romney Presidential Campaign and has previously advised dozens of Senate, Gubernatorial, and Congressional campaigns as a Project Director at Public Opinion Strategies.

***Michael Ramlet***
***Paragon Insights***

Michael Ramlet is a Principal with Paragon Insights where he leads the policy consulting operation. Michael is currently serving as a policy adviser to the National Republican Senatorial Committee (NRSC). In 2013, The Hill named Michael among the "100 to Watch in Washington". In 2012, Michael served as an outside policy adviser to the Republican Governors Public Policy Committee (RGPPC) and has previously completed projects for the American Action Forum (AAF) and American Action Network (AAN).

***Amos Snead***
***Story Partners***

A Principal at Story Partners, Amos plays a key role leveraging his in–depth experience working with leading print, broadcast and online journalists to counsel clients on digital communications and media strategies.

Prior to joining Story Partners, he worked for FTI Consulting, a global communications firm where he counseled Fortune 500 companies in the energy, technology and health industries and served as the primary spokesman for several clients.

He began his career on Capitol Hill, where he served as spokesman for House Republican Whip Roy Blunt, a press aide for the House Energy and Commerce Committee under Chairman Billy Tauzin and Chairman Joe Barton, and as communications director for Representative Louie Gohmert (R–TX).

***Amy L. Sutton***
***Deloitte Tax LLP***

Amy Sutton is Co-Managing Partner of the Passthroughs Group in the Washington National Tax Office of Deloitte Tax LLP and works in the Houston office. She specializes in partnership taxation with an emphasis on publicly traded partnerships and the use of partnerships in mergers and acquisitions. She joined the National Tax Office in 1998, working in Washington, D.C. from 1998 to 1999 and in New York City from 1999 to 2002. Prior to joining the National Tax Office, Ms. Sutton practiced from 1990 to 1998 in

Deloitte's San Francisco office, where she concentrated on partnership, S corporation, and individual taxation in the real estate and investment fund industries.

Ms. Sutton is a regular instructor and presenter at Deloitte internal conferences, and she has also spoken at recent conferences such as the 30th Annual Texas Federal Tax Institute, the North American Petroleum Accounting Conference (NAPAC), Tax Executives Institute - Houston Chapter Tax School, Practising Law Institute's Tax Planning for Domestic & Foreign Partnerships, LLCs, Joint Ventures & Other Strategic Alliances 2014, the 2013 Parker C. Fielder Oil and Gas Tax Conference, Navigating the Net Investment Income Tax (Texas Federal Tax Institute), the Tax Executives Institute 68th Annual Conference, the Southern Federal Tax Institute, the Houston Bar Association Tax Section Meeting, the National Association of Publicly Traded Partnerships (NAPTP) Annual Meeting, and Deloitte's National Publicly Traded Partnership Conference.

Ms. Sutton is a Certified Public Accountant and is licensed in the states of California and Texas. She is a member of the AICPA and has served on the AICPA Partnership Taxation Technical Resource Panel. Ms. Sutton is co-author of the on-line treatise, Federal Income Taxation of Passive Activities, published by Warren, Gorham & Lamont, and of the Bureau of National Affairs (BNA) portfolio, Publicly Traded Partnerships.

Ms. Sutton received her Bachelor of Arts degree, magna cum laude, in Economics and Managerial Studies from Rice University. She continued at Rice University and received a Master's degree in Business Administration, with concentrations in Accounting and Finance, from Rice University's Jones Graduate School of Business. She received a Master's degree in Taxation from Golden Gate University.

Ms. Sutton attended high school in Corpus Christi, Texas. She resides in Houston, where she is an active alumna of her alma mater, Rice University. She is on the Rice University Board of Trustees

***Jonathan Williams***
***American Legislative Exchange Council***

Johnathan Williams is the director of the Tax and Fiscal Policy Task Force for the American Legislative Exchange Council (ALEC), where he works with state legislators and the private sector to develop free-market fiscal policy in the states. Prior to joining ALEC, Jonathan served as staff economist at the Tax Foundation, authoring numerous tax policy studies. His work has been featured in many publications, including The Wall Street Journal, The Los Angeles Times, Forbes and Investor's Business Daily. Williams is a contributor to The Examiner (Washington, D.C.) and writes a syndicated column for the Flint Hills Center for Public Policy in Wichita, Kansas, where he also serves as an adjunct fiscal policy fellow. He is a contributing author to the Reason Foundation's Rich States, Poor States Annual Privatization Report and has written for Tax Analysts, a scholarly journal dedicated to tax issues. Williams has also appeared on numerous television outlets, including FOX Business News.

A Mid-Michigan native, Williams graduated magna cum laude from Northwood University in Midland, Mich., majoring in economics, banking/finance, and business management. While at Northwood, he was the recipient of the prestigious Ludwig von Mises Award in Economics.

**DINNER SPEAKER**

***Charlie Cook***
***The Cook Political Report***

When Charlie Cook makes a pronouncement based on his analysis of the political scene in America, people who want to be "in the know" sit up and listen. For more than two decades he has been Washington's most trusted – and most accurate – voice on all things political, whether it's the outcome of a Congressional, gubernatorial, or presidential election.

Charlie Cook is Editor and Publisher of the Cook Political Report and a political analyst for National Journal magazine, where he writes a twice weekly column. Charlie is considered one of the nation's leading authorities on American politics and U.S. elections. In 2010, Charlie was a co-recipient of the American Political Science Association's prestigious Carey McWilliams award to honor "a major journalistic contribution to our understanding of politics." In the spring semester of 2013, Charlie served as a Resident Fellow at the Institute of Politics at the Kennedy School of Government at Harvard University.

Charlie founded the *Cook Political Report* in 1984 and became a columnist for Roll Call, the newspaper of Capitol Hill, in 1986. In 1998 he moved his column to *National Journal*. Charlie has served as a political analyst or election night analyst for CBS, CNN and NBC News and has been a frequent political analyst for all three major broadcast news networks and has appeared on *Meet the Press* and *This Week*.

*The New York Times* has called Charlie "one of the best political handicappers in the nation" and has said the *Cook Political Report* is "a newsletter which both parties regard as authoritative." The late David Broder wrote in the *Washington Post* that Charlie was "perhaps the best non-partisan tracker of Congressional races," while CBS News' Bob Schieffer called the *Cook Political Report*, "the bible of the political community."

"In Washington, where almost everyone has an opinion on every subject, it can be difficult to recognize true expertise. With Charlie Cook, it would be hard not to recognize. He is widely regarded as one of the most astute impartial analysts of the Washington political scene and is one of the nation's leading authorities on U.S. elections...."