

Horowitz, Mitchell

From: Amber R. Golz <amber.golz@ustaxcourt.gov>
Sent: Thursday, July 30, 2020 2:42 PM
To: Horowitz, Mitchell
Subject: Calendar Call Program acceptance email 2020-21

[This Email Originated From amber.golz@ustaxcourt.gov Which Is External To The Firm]

Dear Mr. Horowitz:

Thank you for your letter agreeing to comply with the Tax Court's requirements relating to calendar call programs. We appreciate your participation in the Court's Clinical, Student Practice and Bar Sponsored Calendar Call Program. We look forward to working with your program through June 30, 2021.

You may contact the Court at any time by letter, through the "contact us" link that appears with the information for Tax Clinics on our Web site (ustaxcourt.gov), or you may call our clinic phone number at 202-521-3366 if you have questions or comments regarding the Court's program or requirements relating to participation of taxpayer clinics. We encourage your input and feedback with respect to this program which helps coordinate assistance to many otherwise unrepresented petitioners.

It is important that you notify us if there are any changes in personnel or contact information for your organization so the information on our website is correct and we may continue to contact the clinic in the future. In addition, please be aware that the next letter due date will be February 16, 2021.

Thank you again for your participation in the Court's program.

Amber Golz
LITC and Calendar Call Administrator
United States Tax Court

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February 12, 2020

The Honorable Chief Judge Maurice B. Foley
United States Tax Court
400 Second Street, N.W.
Washington, D.C. 20217

RE: CALENDAR CALL PROGRAM FOR FLORIDA BAR TAX SECTION

DEAR CHIEF JUDGE FOLEY:

I am writing on behalf of the Tax Section of the Florida Bar sponsored calendar call program to provide the Court with the information requested in section 1.c. of the Tax Court's Requirements for Bar sponsored calendar call programs.

1. Name, address, Tax Court Bar number (if applicable), e-mail address, and phone number of the calendar call program director/coordinator.

The Florida Bar Tax Section has four (4) coordinators, one for each of the official places of trial, as follows:

Miami: Karen Lapekas, 540 Brickell Key Dr. Suite C1. Miami, FL 33131; TCBN: SK0324; karen@lapekaslaw.com; 305-600-1485

Tampa: Mitchell I. Horowitz; 401 E. Jackson Street, 24th Floor, Tampa, Florida 33602; TCBN: HM0395; mitchell.horowitz@bipc.com; 813-222-1105

Jacksonville: Harris L. Bonnette, Jr., 501 Riverside Avenue, Suite 600, Jacksonville, Florida 32202; TCBN: BH0557; HBonnette@fishertousey.com; 904- 356-2600

Tallahassee: Jami Coleman, 701 East Tennessee Street, Tallahassee, Florida 32308; TCBN: CJ1756; jcoleman@williamscoleman.law; 850-222-0013

2. Identify the place(s) of trial served by the calendar call program.

The calendar call program is serviced in Miami, Tampa, Jacksonville, and Tallahassee.

3. Whether the Bar sponsored calendar call program provides assistance to self-represented petitioners in small tax cases, regular tax cases, or both.

In Miami, Tampa, and Jacksonville, the calendar call program provides assistance to self-represented petitioners in both small and regular tax cases. The Tallahassee program only provides assistance in small tax cases.

4. The Tax Section of the Florida Bar agrees to comply with the U.S. Tax Court Requirements for Bar sponsored calendar call programs.
5. A copy of the calendar call program's guidelines as described in section 1.b. of the Requirements is attached, and the guidelines appear on the pro bono program's web site at <http://floridatallaxlawyers.org/>.
6. The calendar call program provided consultation, assistance, and/or advice for of petitioners at the following trial sessions during the calendar year preceding the submission of this letter:

Miami: Together with local low income taxpayer clinics, there were three (3) trial sessions during 2019 serviced by the calendar call program where approximately 15 petitioners were assisted. There were also two (2) settlement days hosted by Legal Services of Greater Miami where approximately 12 petitioners were assisted.

Tampa: During calendar year 2019, there were two (2) trial sessions, and the calendar call program provided assistance to approximately 15 petitioners together with local low income taxpayer clinics.

Jacksonville: During calendar year 2019, there was one (1) trial session serviced by the calendar call program, and 6 petitioners were assisted.

Tallahassee: During calendar year 2019, there was one trial session, and the calendar call program provided assistance to one (1) petitioner.

7. The Bar sponsored calendar call program does have access to interpreters in the following languages:

Miami: Spanish

Tampa: Spanish

Jacksonville: None so far.

Tallahassee: Spanish

8. The Bar sponsored calendar call program does participate in pro bono days in advance of calendar call.
9. The pro bono program offers the following suggestions for better assisting low-income petitioners in their interactions with the Court:

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It continues to be our experience that there have been fewer self-represented petitioners participating in the pro bono days prior to calendar call. We understand that the Court does provide information to self-represented petitioners at the time the petition is received, and shortly after the case is set for trial. We coordinate the pro bono days with the local IRS Area Counsel offices, but it might be helpful if the Court could also be involved in that process as well for purposes of providing notice to the petitioners.

The calendar call program director/coordinator will immediately notify the Court of any change of director, address or telephone number.

Sincerely,

BUCHANAN INGERSOLL & ROONEY PC



Mitchell I. Horowitz

cc: Janette McCurley, Esq., Chair
Karen Lapekas, Esq.
Jami Coleman, Esq.
Harris Bonnette, Jr., Esq.