

Tax Policy Advisory Committee (TPAC) Meeting

Joshua Parker., Chair
David Friedline, Vice Chair

*Park Hyatt Hotel
1201 24th Street NW
Washington, DC*

Wednesday, June 10, 2026
7:30 AM – 12:00 PM

SPEAKER BIOGRAPHIES

The Honorable Lisa Blunt Rochester (D-DE) United States Senator

Senator Lisa Blunt Rochester was born in Philadelphia and raised in Wilmington, Delaware. After earning her master's degree in urban affairs and public policy from the University of Delaware, Blunt Rochester worked in U.S. Senator Tom Carper's congressional office before serving in the cabinets of two Delaware governors, including as the state's secretary of labor. In 2016, she made history when she was elected to represent Delaware's at-large district, becoming the first woman or person of color to represent Delaware in Congress. In 2024, she was elected to the Senate after serving four terms in the House of Representatives.



In the Senate, Lisa Blunt Rochester is a leading voice on housing and workforce issues, the future of work, and building an economy that works for everyone. She is the only Democratic Senator currently serving on four A-level Committees: Banking, Housing, and Urban Affairs; Commerce; Environment and Public Works; and Health, Education, Labor, and Pensions. The Senator is a mother, widow, and outspoken voice for bridging differences and generating results. In 2021, she received the legislative action award from the Bipartisan Policy Center for demonstrating skill, grace, and tenacity to get things done for her constituents and the nation.

CJ Aberin Principal and Co-Founder, KBKG

CJ Aberin is a Principal at KBKG and oversees the Green Building Tax Incentive practice. CJ Aberin has performed Green Building Tax Incentive studies and Cost Segregation for clients in various industries that range from Fortune 500 companies to individual real estate investors. He has analyzed projects spanning the entire US, including multifamily and apartment projects, hospitals, government buildings, hotels, manufacturing & industrial facilities, retail outlets, offices, auto dealerships, casinos, golf courses, gas stations, and restaurants. In addition to securing millions in energy

efficiency tax credits and accelerated deductions for his clients, CJ has provided additional real estate and tax consulting services. Prior to joining KBKG, CJ was responsible for starting, developing and overseeing the Cost Segregation department at one of Southern California's largest regional accounting firms. His prior experience includes managing Cost Segregation professionals for one of the Big Four accounting firms as well as a nationally recognized valuation services firm. He earned his Bachelor of Science degree in Electrical Engineering with honors from the University of Southern California.

Bobby Andres

Tax and Trade Policy Advisor, Office of Senate Minority Leader Charles Schumer (D-NY)

Bobby Andres is the principal tax and trade advisor for Senate Democratic Leader Chuck Schumer (D-NY). He previously served as Chief Tax Advisor for Senate Finance Committee Ranking Member and former Chairman Ron Wyden (D-OR). Bobby joined the staff of the Finance Committee in 2013 under then-Chairman Max Baucus (D-MT). At the Finance Committee, he led policy initiatives on climate and energy tax, international tax, infrastructure, and economic development incentives. Bobby graduated with a degree in Political Science, with honors, from the University of Georgia, and has a Master of Public Policy from Georgetown University

Curt Beaulieu (*Tuesday June 9 speaker*)

Senior Policy Advisor, Office of House Speaker Mike Johnson (R-LA)

Curt Beaulieu currently serves as a senior policy advisor, and the principal advisor on tax policy matters, for House Speaker Mike Johnson. Prior to his current role, Curt held a number of tax policy-related positions on Capitol Hill and in the private sector. He was a Senior Director at Boeing for over seven years, as well as a Senior Counsel at Bracewell LLP. Before that, he served as Tax Counsel on the Republican staff of the Senate Finance Committee, focusing on energy, natural resources, estate, and gift taxes. Before joining the Senate Finance Committee, Curt worked as Tax Counsel in the Office of Senator Orrin G. Hatch. He also worked for the former Ranking Member of the House Ways and Means Committee, Congressman Jim McCrery (R-LA). 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.

Michael Gould

Tax Counsel, Senate Finance Committee Majority Staff

Michael Gould is a tax counsel for the Senate Finance Committee Majority Staff and Chairman Mike Crapo (R-ID). His responsibilities include pass-through tax matters, as well as financial products. Before joining the Finance Committee, Michael Gould served as a senior attorney (corporate and pass-throughs & special industries) of the Internal Revenue Service's Office of Chief Counsel. He served in the Office of Chief Counsel for more than a decade. In this role, he was an adviser to the IRS on interpretations of the corporate and pass-through entity tax laws, such as provisions dealing with mergers and acquisitions, spin-offs, and multiple taxpayer relief provisions. Mr. Gould played a significant role in the development of published and private tax guidance, and in developing and implementing the enforcement positions in these areas. Prior to his public service, he held positions at a Fortune 500 company, the National Tax Office of an accounting firm, a Big Four accounting firm and served on the AICPA S Corporation Taxation Technical Resource Panel. Mr. Gould is an adjunct professor at the Georgetown University Law Center and a frequent speaker on corporate and pass-through tax issues at tax conferences.

Andrew Grossman

Chief Tax Counsel, House Ways and Means Committee Minority Staff

Andrew Grossman is the Chief Tax Counsel for the Ways and Means Minority staff and currently in his eighth year working for Ranking Member Richie Neal (D-MA). Prior to joining the Ways and Means Committee, he served as Legislation Counsel for the Joint Committee on Taxation. Prior to working on the Hill, he was an associate at Skadden, Arps, Slate, Meagher & Flom, and worked as a high school and middle school math teacher. He has a BA from Amherst College, a JD/LLM from NYU School of Law, and an M.Ed from George Washington University.

Corey Husak

Director, Tax Policy, Center for American Progress

Corey Husak is the director of tax policy at American Progress, working to ensure that American Progress' revenue policies promote economic growth that is strong, sustainable, and equitably shared. He is an expert on tax issues, including the state and design of congressional legislation-related taxes and the state of academic research on taxation, revenue, and economic growth. Prior to joining American Progress, Husak served as tax economist at the Committee for a Responsible Federal Budget and as tax and economic policy adviser to Sen. Bob Casey (D-PA), a senior member of the Senate Finance Committee, where he worked on the design and subsequent implementation of key policies in the Inflation Reduction Act. Previously he served as senior manager of external relations at the Washington Center for Equitable Growth, research consultant for the Office of Revenue Analysis of the Office of the CFO of Washington D.C., NAFTA policy coordinator at the Corn Refiners Association, and legislative correspondent for Sen. Claire McCaskill (D-MO). He earned his master's in public policy from the University of Chicago.

William McBride

Chief Economist, Tax Foundation

Dr. William McBride is the Chief Economist & Stephen J. Entin Fellow in Economics at the Tax Foundation, where he oversees major research projects primarily related to reforming the federal tax code, advancing sound tax policy, and improving the federal government's fiscal outlook.

Dr. McBride has more than ten years of experience analyzing a variety of economic and policy issues. At the Tax Foundation he has served as the Vice President of Federal Tax Policy, leading our efforts to research, model, and reform the U.S. tax code, and as Chief Economist, researching the economics of taxation and guiding the development of the Tax Foundation dynamic scoring model. From 2015 to 2020 he was a manager in the National Economic and Statistics (NES) group at PwC where he worked on a wide array of projects including economic impact analyses, industry surveys, U.S. federal and state tax revenue estimates, and issues related to tax reform at the state, federal, and international levels. Dr. McBride holds a PhD in economics from George Mason University, where he specialized in macroeconomics and agent-based modeling.

Josh Parker

Chairman and CEO, Ancora L&G and Chair, RER Tax Policy Advisory Committee

Josh Parker is Ancora's Founder, Chairman and Chief Executive Officer. He leads the Board of Directors and sits on the firm's Investment Committee. As Chairman and CEO, he is responsible for overseeing all firm strategy, policies and procedures as well as day-to-day operations. A national

leader in the anchor institution, life sciences, and innovation real estate sectors, he has unique real estate experience spanning adaptive re-use, urban redevelopment, innovation and entrepreneurship initiatives, university-leased real estate and mixed-use development. After a stint in NY theatre, Josh began his real estate career in Durham, NC. In the two decades since as a serial entrepreneur, he experienced industry success that includes developing a combined 4 million square feet totaling over \$3 billion in value. He is a member of the Economic Club of Washington DC and holds leadership positions at the Urban Land Institute and the Council on Competitiveness, among other organizations. Mr. Parker is a graduate of North Carolina Central University.

Russell W. Sullivan

Shareholder, Brownstein Hyatt Farber Schreck, LLP

Russ Sullivan, a former staff director for the Senate Finance Committee, now provides strategic counsel to clients, offering comprehensive solutions from an administrative, regulatory and legislative perspective to some of their most complex matters. He brings a unique perspective to a wide variety of issues facing a broad range of industries, including tax, healthcare, energy, pensions, transportation, education, trade and economic development, as well as matters involving the nonprofit and for-profit enterprise sectors. Russ began working on Capitol Hill in 1995 and joined the Senate Finance Committee staff in 1999. He served as the staff director to the committee from 2004 until his retirement from the Senate in 2013. During his tenure, many of the most complex issues facing the business community came before the committee. A native of Little Rock, Arkansas, Russ graduated from Baylor University and received his law degree from the University of Texas. He is active in the community, and serves on the board of Capital Area Reach, a mentoring program for students in the Washington, D.C. area.

Krishna Vallabhaneni

Tax Legislative Counsel, Office of Tax Policy, U.S. Department of Treasury

Krishna Vallabhaneni serves as the Tax Legislative Counsel in the Office of Tax Policy in the U.S. Treasury Department. The Tax Legislative Counsel (TLC) is responsible for advising the Assistant Secretary (Tax Policy) and other Treasury officials in connection with the formulation of the Administration's domestic taxation policy, for formulating, analyzing, and reviewing domestic taxation legislation, and for preparing the Administration's testimony on such legislation. The TLC advises congressional staff in drafting legislation and in documenting the legislative history of domestic tax legislation. In addition, in consultation with the IRS, the TLC is responsible for reviewing all Treasury regulations and IRS revenue rulings, revenue procedures, and other published guidance relating to domestic tax issues. Such regulations and rulings play a crucial role in the development of tax policy and implementation of tax law. Mr. Vallabhaneni has served as TLC since November 2018. His prior positions include as a senior manager in the Washington National Tax group at Deloitte and as an attorney in the Office of Associate Chief Counsel (Corporate) at the IRS. Mr. Vallabhaneni has degrees from Johns Hopkins (BA), George Washington University (JD), and New York University (LLM, Taxation).

Isaac J. Wheeler

Partner, Sullivan & Cromwell LLP

Isaac Wheeler is the co-head of Sullivan & Cromwell's Tax Group and a Member of the Real Estate Roundtable's Tax Policy Advisory Committee. He represents a wide range of clients, including financial institutions and other multinational corporations, asset managers, real estate developers, and

private individuals. Mr. Wheeler works on M&A, real estate, joint venture, hedge fund, private equity, and partnership transactions. He also regularly works with Sullivan & Cromwell's Estates and Personal Group in advising families and individuals in connection with their estate planning transactions and their worldwide investments. He is a Member of the New York Bar and has degrees from the University of Michigan (B.A.) and New York University School of Law.

Gilbert J. Winn

Chief Executive Officer, WinnCompanies

Gilbert Winn is the Chief Executive Officer of WinnCompanies, one of the nation's leaders in multifamily property development and management. Founded in 1971 and headquartered in Boston, WinnCompanies is the 9th largest multi-family housing manager and largest operator of affordable housing in the United States. The company's portfolio includes 843 properties and over 120,000 units in 26 states. The portfolio includes senior, mixed-income, market rate, military and mixed-use communities. As CEO, Mr. Winn is responsible for the creation, planning, implementation and integration of the company's strategic vision and growth. He oversees three affiliates with 4,300 employees: WinnDevelopment, the company's property development arm, which has developed 18,000 housing units with another 5,000 in the pipeline; WinnResidential, which manages multi-family communities; and WinnResidential Military Housing Services, which manages privatized military housing. Prior to joining WinnCompanies, he was an Associate at Related Capital Company, a full-service real estate investment company based in New York City, where he originated and implemented more than \$150 million of equity investments. Mr. Winn graduated *magna cum laude* from the University of Pennsylvania, earning a Bachelor of Arts studying History and Psychology.