11-C-0520

A COMMUNICATION FROM CATHY RICHARDS, PRESIDENT, ATLANTA PLANNING ADVISORY BOARD (APAB), TO MUNICIPAL CLERK RHONDA DAUPHIN JOHNSON:

SUBMITTING THEIR APPOINTMENT OF KELLI J. REID TO SERVE AS A MEMBER OF THE BELTLINE TAX ALLOCATION DISTRICT (TAD) ADVISORY COMMITTEE, SCHEDULED TO BEGIN ON THE DATE OF COUNCIL CONFIRMATION.

CONFIRMED BY
MAY 02 2011
COUNCIL

- ☐ CONSENT REFER
- ☐ REGULAR REPORT REFER
- ☐ ADVERTISE & REFER
- ☐ 1ST ADOPT 2ND READ &REFER
- ☐ PERSONAL PAPER REFER

Date Referred: 3/21/11
Referred To: CD/HR + COC
Date Referred:
Referred To:
Date Referred:
Referred To:

First Reading

Committee
Date
Chair
Referred To

Committee CD/HR
Date 3/28/11
Chair
Action
Fav, Adv, Hold (see rev. side)
Other
Members
Refer To COC

Committee COC
Date 5/2/11
Chair Felicia A. Moore
Action
Fav, Adv, Hold (see rev. side)
Other
Members
Joyce M. Sheperd
Cleta Winslow
Refer To

Committee CD/HR
Date 4/26/11
Chair Joyce M. Sheperd
Action
Fav, Adv, Hold (see rev. side)
Other
Members
Cleta Winslow
Refer To

Committee
Date
Chair
Action
Fav, Adv, Hold (see rev. side)
Other
Members
Refer To

FINAL COUNCIL ACTION

☐ 2nd ☐ 1st & 2nd ☐ 3rd

Readings

☐ Consent ☐ V Vote ☑ RC Vote

CERTIFIED
MAY 02 2011
ATLANTA CITY COUNCIL PRESIDENT

CERTIFIED
MAY 03 2011
Rhonda Dauphin Johnson
MUNICIPAL CLERK

MAYOR'S ACTION

Atlanta
Planning
Advisory
Board

CITY OF ATLANTA
KASIM REED, MAYOR

2011 Officers
President
Cathy Richards

1st Vice President
Gerald Neumark

2nd Vice President
Cathy Muzzy

Recording Secretary
Patrick Crabtree

Correspondence Secretary
Richard Rauh

Parliamentarian
Patrise Perkins Hooker

NPU / Citizens Participation Coordinator
Wendy Scruggs- Murray
404-330-6899

Atlanta City Hall
55 Trinity Avers
Atlanta, GA 30303

APAB CONTACT INFO
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March 17, 2011

11- C -0520

The City of Atlanta Office of Municipal Clerk
Atlanta City Hall
55 Trinity Avenue, Suite 2700
Atlanta, GA 30303

To the Office of the Municipal Clerk,

The Atlanta Planning Advisory Board is pleased to submit the following names for consideration by the Atlanta City Council for appointment to the Beltline Tax Allocation District Advisory Committee (Beltline TADAC).

New Appointments: L. Danielle Carney, Jennifer Freeman, Robert A. Jones III, Moki Macias, Kelli J. Reid, and Mark Schultz. Resumes for all new candidates are attached.

Returning Appointees: Albert Caproni, Ron Hewitt, Jim Schneider, who will also need to be reaffirmed.

It is the responsibility of the Atlanta Planning Advisory Board to select twelve appointments to the Beltline TADAC to be confirmed by the Atlanta City Council. As of December 2010, all but three of the sitting appointees had resigned or terms expired. APAB 2011 officers are in the process of identifying citizen representative from each Council District to fill the twelve appointment positions. We are still seeking to fill three positions. APAB has interviewed six new candidates for their capability to serve as a viable member of the Beltline TADAC and confirmed the return of three candidates to the board. We now submit the names of these nine persons for approval by City Council.

We hope that the findings of City Council will support our conclusions with the appointment of all candidates. We hope that this process will be complete by March 31, 2011.

Please advise when Council will vote on the nominations. We look forward to your response.

Kindest regards,

Cathy Richards

Cathy Richards
APAB President
404-778-5718

Kelli J. Reid
375 Highland Ave. NE
Unit 1001
Atlanta, GA 30312
(404) 275-1932
kellijreid@hotmail.com

Education:

Keller Graduate School of Management
MBA
December 2005

Clark Atlanta University
Bachelor of Arts in Accounting
May 2000

Objective: To actively participate in an organization that will enable me to grow while utilizing my communication, organization, planning, project management and analytical skills in a comprehensive and creative manner.

Professional Experience:

January 2008 – Present **Ernst & Young LLP**
Senior Tax Accountant **Atlanta, GA**

Service clients in the pharmaceutical and consumer goods industry as well as clients that manufacture carbon, firearms and ammunition, as well as clients that are providers of communication and aviations electronics, risk mitigation and business solutions, gas and electricity, petroleum, in addition to clients that are retailers of household goods, sporting goods and clothing.

Indirect Tax

- Review sales and use tax returns for clients.
- Prepare a matrix and memorandums regarding various states treatment of bad debts.
- Co-lead an internal lunch and learn regarding FAS 5 and how it affects sales and use tax.
- Assist with preparing matrices regarding various state incentives, such as green incentives, in multiple states.
- Research the process of applying for discretionary incentives as well as those mandated by law.
- Prepare client manuals describing the treatment of manufacturing exemptions, material and handling equipment, repair and spare parts, and packaging equipment in numerous states.
- Assist with a GA material and handling equipment refund.
- Research sales and use tax laws in various states.

Quantitative Tax Services

- Prepare and review Form 3115, Accounting Method Changes.
- Conduct fixed asset studies to evaluate which client expenditures are incidental repair and maintenance expenses under Sec. 162 and which are capital improvements under Sec. 263(a).
- Perform interviews with clients to determine the treatment their fixed assets; i.e, determine capitalization policies.
- Perform Accounting Method Change reviews on potential clients.
- Manage relationships with clients and team member as well as facilitate status update calls.
- Manage fixed asset studies which entails, managing budgets, expectations, and the process flow of the study, leveraging the client electronic and paper deliverable to staff and interns.
- Prepare written documentation that sets forth all relevant facts including but not limited to a factual narrative describing the facts surrounding the expenditures that are relevant to the determination of whether it is a current expense vs. a capital expenditure.
- Conduct research and development tax credit (IRC §41) and tax deduction (IRC §174) studies.
- Prepare the costing workpapers, conduct interviews with clients to go over the four-part test, review 3rd party contracts for risk, and obtain contemporaneous documentation from the client to substantiate a tax credit and/or deduction.
- Manage staff and interns during the fixed asset and research and development studies.
- Research federal statutes and regulations using RIA.

October 2006 – December 2007 **Smart and Associates, LLP**
Senior Tax Accountant **Devon, PA**

- Prepare and Review Sales and Use Tax Returns.
- Prepare Voluntary Disclosure Agreements (VDAs) for various clients in order to eliminate penalties.
- Correspond with third parties in an effort to complete VDAs.
- Analyze nexus in various states in order to help clients comply with state laws.
- Correspond with state taxing jurisdictions in an effort to maintain a relationship with the states for client purposes.
- Resolve tax issues that may arise.
- Research tax laws for clients in diverse industries.
- Maintain tax calendars for clients in order to stay abreast of tax deadlines.
- Prepare tax returns, train employees, and assist in audit preparation work.
- Assist in the preparation of a Virtual Tax Office where clients can maintain exemption certificates which will reduce potential audit assessments.
- Assist clients with the sales tax liability accounts, reconciliations, and estimated sales tax payments.

January 2005 – October 2006 **Nine West Footwear Corporation**
Senior Tax Accountant/ Supervisor **Bristol, PA**

- Supervise one sales tax clerk in preparing over 170 Sales & Use tax returns in 42 states in addition to manage applicable sales and use tax for Jones Apparel Group whose subsidiaries consist of Nine West Footwear Corp, Jones Retail Corporation (Anne Klein, Kasper, Jones New York, Nine West, Easy Spirit, and Bandolino) in addition to Million Wishes, Inc, a subsidiary of Victoria and Co, LTD.
- Created a use tax accrual method for Jones Retail Corporation and Nine West Footwear Corp.
- Manage Sales & Use Tax audits, research audit points, and implement corrective actions.
- Lead tax projects to improve reporting of interstate sales, taxable freight, and claiming prior period credits, and implemented a way to report use tax.
- Periodically review areas where the company may have not taken a credit in an effort to claim it in the future.
- Prevent and resolve tax return assessments.
- Research and stay abreast of tax laws in 42 states, changes in tax rates, sales tax holidays, streamline sales tax agreements, and notify MIS of rate changes needed in retail stores or web sales system on a monthly basis as well as ensure new stores have the proper rate prior to opening day.
- Maintain Sales and Use Tax, Prepaid Sales and Use Tax, and Sales and Use Tax Receivables reconciliations and make applicable journal entries.
- File escheat returns for aged unclaimed payroll and AP checks to respective state authorities.
- Executed a sales and use tax method for the direct selling business (Million Wishes, Inc.) which was incorporated in December 2005.
- Involved in the implementation of SAP.
- Created a sales and use tax procedures manual for Sarbanes Oxley purposes.
- Annually review the employee store manual to ensure the sales tax guidelines reflect the current state laws.
- Explore tax avoidance areas for all subsidiaries.
- Periodically interview candidates for positions needed within the department.

October 2002 – December 2004 **Johnson & Johnson Consumer Companies, Inc.**
Tax Accountant **Skillman, NJ**

- Preparation of sales and use, property, payroll, and miscellaneous tax returns for three operating companies, which include J&J Consumer, Ora Pharma, and Baby Center LLC in addition to assisting in the preparation of the Baby Center LLC federal return.
- Preparation of true ups to ensure the proper sales and use tax is collected, accrued and paid.
- Research and stay abreast of state tax laws for Georgia, New Jersey, and Pennsylvania.
- Monitor state audits as well as negotiate with auditors for a favorable outcome.
- Maintain and quarterly reconcile sales and use, property, and miscellaneous tax accounts and make entries in the general ledger.

- Partake in the implementation of Ariba Buyer to ensure all needs are met such as, 1099 reporting, tax audit request, exemption certificates, educating business partners on matters that will aid in tax audits, and train the campus regarding sales & use tax.
- Six Sigma/Green Belt Training: in reference to over accruals due to Ariba Buyer.
- Ensure work is in compliance with Sarbanes-Oxley.

July 2000 – March 2002 **Reznick Fedder & Silverman; CPA**
Tax Associate **Atlanta, GA**

- Preparation of partnership, corporate, individual, and non-profit tax returns including, foreign corporate and individual returns.
- Research and provide proper disclosure of low-income housing credits in addition to federal and state requirements using CCH and RIA to ensure proper disclosure and treatment on partnership and non-profit returns.
- Correspond with the Internal Revenue Service to resolve client tax issues.
- Assist in recruiting professional personnel from the Atlanta University Center.

Inroads Intern Summers of July 1996 – August 1999 **Sunoco, Inc.**
Philadelphia, PA

Payroll Analyst, 1999

- Prepare quarterly Occupation Privilege Tax and Employment Income Tax returns for each locality.
- Assist in the remittance of various payroll liabilities.

Excise/Income Tax Department, 1997-1998

- Assist in the preparation of state and local income tax returns in addition to sales and use tax returns.
- Assist in the preparation of federal audits by creating spreadsheets; evaluate data from source documents, and comparing data to other sources.

Insurance Department, 1996

- Reconcile daily-wire transfers to Travelers for claim payments to the bank statement, general ledger, and cash claim reports.
- Coordinate underwriting data and corresponding to all request not returned.

Certification: Passed part two, the Business section, of the IRS Enrolled Agents Exam. Sitting for part three, the Representation, Practice and Procedures section, in February, 2011.

Computer Skills: Proficient in Windows 1998 and XP, Microsoft Word, Power Point, Advanced Excel Skills (Pivot Tables, Vlookups, If Statements and more), BNA, Gosystem Audit, Gosystem Tax, SAP, CorpTax, Corporate Mainframe, Consumer Mainframe, RIA Checkpoint, CCH, Minitab, Ariba Buyer, InfoWeb, Eagle, JD Edwards, Sales Audit (STS), Insource, and Citrix Metaframe XP, FrontPage (Website creative application.)

Honors & Activities:

Current Activities

Ernst & Young LLP 2010 Volunteer Wall of Fame Winner.

Spring of 2008 - Present
Big Brothers Big Sisters: Act as a Big Sister to one middle school child. Interaction includes activities that will enable her to ponder on a future career; i.e. building a toothpick tower that enabled her to explore becoming an engineer or an architect; playing word games as well as coming up with a word of the week to assist her with her vocabulary and Cyberchase math activities that will enhance her math skills. Giving updates to our Big Brothers big Sisters Match specialist.

Summer of 2008 - Present
Furkids Volunteer: Clean the animal cages, record animal interaction, socialize with visitors in an effort to find a home for each animal and discuss the purpose of Furkids and how the adoption process works.

Fall of 2008 - Present
Cyberchase: Participation in Cyberchase through the sponsorship of Ernst & Young. Participation includes teaching a fourth grade class twice a week every November and recruiting volunteers to participate in the program. The activities will allow the students to understand the importance of saving; know how to sum money with various denominations; understand different career paths that they may take and to be creative through using resources given to make various useable items.

Fall of 2009 - Present
Impact Give Back: Participation in the committee responsible for addressing individual, community and global needs. Participation includes but is not limited to assist in coordinating meetings and agendas for committee meetings; identifying best practices in addressing all needs, scholarship committee chair, coordinating with non-profits in an effort to determine and address their needs and assist in creating a budget for each year.

Fall of 2009 - Present
Impact Producer: Assist with developing creative ways to reach the needs of others, coordinating a church service on special occasions (such as a celebration of seniors which involve seniors dancing to different genres of music as well as promote Adopt-A-Grandparent) and ensure that all guest's needs are addressed.

Spring of 2010 - Present
Adopt-A-Grandparent: Developed a bond with one senior in an effort to ensure her needs are met and that she knows that someone is there and cares about her.

Fall of 2010 - Present
The Intown Academy: Reside on the Developmental Committee. The Developmental Committee leads the board's participation in resource development and fund raising. The committee develops policies, plans, procedures, and schedules for board involvement in fund raising as well as educates board members about the organization's plans and the resources needed to realize those plans.

Annual
Serve as a EY Connect Day Captain: Once a year Ernst & Young ("EY") allows employees to take a day off to give back to our community. As a result, in 2010 EY hosted the first annual EY Connect Day. Serving as a captain of EY Connect Day, Captains were responsible for corresponding with an organization, stemming from a list of organizations that EY provides, to determine the organizations needs, recruit EY employees to participate in giving back to that organization and provide feedback on what we can enhance going forward. Some of the activities involve, but is not exclusive to, mentoring students, painting areas of a building, planting a garden, catering to seniors and feeding the homeless.

Past Activities

- **Georgia State Recruiting:** Participation in panel discussions that include, but are not limited to, topics such as career paths within accounting and paths to success; and participation in recruiting socials and events such as the Summer Leadership Program ("SLP").

- **Clark Atlanta CEO Academy:** Participation in the Ernst & Young sponsored program that mentored to a select group of students. Areas if focus during the program include mentorship, networking, community service, teaching the students various service lines within the firm, enhancing communication skills, etiquette and social activities to gain a personal relationship with the students.

- **Facilitator:** Facilitate a Connections Group through Impact Church which includes, but is not limited to, reaching out to local businesses to hold social events at their locations in turn for our support, sending out communications to class members, developing a lesson plan for all sessions and identifying others that may serve as facilitators of future sessions.

- **Inroads Alumnae and Facilitator:** Conduct training sessions with interns that included challenges faced in Corporate America, proper attire in the workplace and during an interview and the importance of executive presence in the workplace.

RCS# 1016
5/02/11
6:07 PM

Atlanta City Council

REGULAR SESSION

MULTIPLE 11-C-0517,11-C-0519,11-C-0520,11-C-0523
11-C-0549
CONFIRM

YEAS:	12
NAYS:	0
ABSTENTIONS:	0
NOT VOTING:	4
EXCUSED:	0
ABSENT	0

Y Smith	NV Archibong	Y Moore	NV Bond
NV Hall	Y Wan	Y Martin	Y Watson
Y Young	Y Shook	Y Bottoms	Y Willis
Y Winslow	Y Adrean	Y Sheperd	NV Mitchell

MULTIPLE