
LMSB

Directory



Internal Revenue Service

Street Address

Mint Building
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Washington, DC 20001

Mailing Address

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Large and Mid-Size
Business Division
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Washington, DC 20224

TEL: (202) 283-8710
FAX: (202) 283-8508

Commissioner

Deborah Nolan

Acting Deputy Commissioner

Bruce Ungar

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The Large and Mid-Size Business (LMSB) Division serves corporations, subchapter S corporations, and partnerships with assets greater than \$10 million. These Businesses employ a large number of employees, deal with complicated issues involving tax law and accounting principles, and conduct business in an expanding global environment. More information is available about LMSB on the IRS web site at www.irs.gov.

LMSB Vision

- We will be a world class organization responsive to the needs of our customers in a global environment while applying innovative approaches to customer service and compliance.
- We will apply the tax laws with integrity and fairness through a highly skilled and satisfied workforce, in an environment of inclusion where each employee can make a contribution to the mission of the team.

The **LMSB** is organized along five industries and one examination support function.

Communications, Technology, and Media

Communications, Technology, and Media consists of taxpayers related to computer production, media (including communication and software), sports franchises, and recreational firms. There are approximately 15,300 taxpayers comprised of 1,100 large businesses and 14,200 mid-size businesses.

Tom Wilson

Industry Director
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Financial Services

Financial Services consists of taxpayers related to commercial banking, insurance, savings and loans, securities, and financial services. There are approximately 53,000 taxpayers, which include 3,000 large businesses and 50,000 mid-size businesses.

Paul DeNard

Industry Director
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Heavy Manufacturing and Transportation

Heavy Manufacturing and Transportation consists of taxpayers involved in air and ground transportation, aerospace, motor vehicles, shipping, and real estate. There are approximately 50,500 taxpayers of which 600 are large businesses and 49,900 are mid-size businesses.

John Petrella

Industry Director
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Natural Resources and Construction

Natural Resources and Construction consists of taxpayers related to oil and gas, mining, forest products, chemicals, waste management, nuclear energy, construction, and utilities. There are approximately 17,500 taxpayers, which include 700 large businesses and 16,800 mid-size businesses.

Bobby Scott

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Retailers, Food, Pharmaceuticals, and Healthcare

Retailers, Food, Pharmaceuticals, and Healthcare consists of taxpayers related to food and beverage, retailing, pharmaceuticals, agricultural commodities, farms, and healthcare. There are approximately 20,800 taxpayers, which include 900 large businesses and 19,900 mid-size businesses.

Bob Brazzil

Industry Director
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Field Specialists

Field Specialists supports the examination function by conducting efficient, fair, and timely examinations in 5 specialty areas. Field Specialists include Computer Audit Specialists, LMSB Employment Tax Specialists, Economists, Engineers, Financial Products, and Transactions Specialists.

Keith Jones

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Charlie Brantly

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Division Headquarters



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Headquarters Operations **LMSB**

International

Headquarters Office of International (IN) provides leadership and guidance to the LMSB operating division on International matters. As the U.S. Competent Authority, the Director of International is responsible for timely and effective implementation of our tax treaties and tax information exchange agreements. International pursues global coordination, identifies emerging international issues, provides tax assistance to U.S. taxpayers residing overseas, and, when requested, assists foreign governments in strengthening their internal tax systems. In addition, International personnel advise the Commissioner, LMSB Division, regarding proposed Regulations/Rulings and litigation, and work closely with Treasury and Counsel on issues affecting LMSB customers. The Office of Electronic Commerce also is located within International.

Performance, Quality Assurance, and Audit Assistance

The Performance, Quality, and Innovation Office (PQI) provides the organization with assessments of operational effectiveness, of both in-process and examined cases, and by identifying "best in class" practices and then evaluating and promoting those practices among the industry groups. In addition, PQI assists in the development of balanced measures, and serves as a catalyst for changes that enhance customer/employee satisfaction business results.

Pre-Filing and Technical Guidance

The Pre-Filing and Technical Guidance Office (PFTG) is dedicated to providing pre-filing services and technical guidance to both internal and external customers. The goal of the PFTG organization is to provide quality, consistent, and timely guidance and assistance to all customers in support of the LMSB Strategic Issue Management Strategy. A key PFTG service includes the development and implementation of service-wide pre-filing activities for administration by field personnel. In addition, PFTG helps to coordinate the resolution of complex tax issues with Counsel and Treasury, develops processes to build leveraged partnerships, and collaborates with stakeholders and industry experts to

increase taxpayer education, develop industry expertise, and clarify core issues. PFTG also has jurisdiction over the Office of Tax Shelter Analysis.

Strategy, Research, and Program Planning

The Strategy, Research, and Program Planning Office (SRPP) provides LMSB with division-wide support, required to conduct ongoing operations, and prepare for the future. Responsibilities include developing objectives, examination plans, and criteria for audit selection of LMSB cases. SRPP coordinates staffing and funding issues and supports budget formulation with Management and Finance. SRPP is responsible for establishing return coverage across industry units and supporting cross-industry research based on voluntary compliance objectives. In addition, SRPP is responsible for conducting environmental scans for LMSB, identifying trends, issues, and problems across industry lines, defining LMSB programs, and establishing LMSB Strategic Plans. SRPP also provides a key linkage with Pre-filing Technical Guidance and works with external academia and research expertise for emerging issues and trends.

Management and Finance

The Management and Finance Office (M&F) oversees various financial planning, resource allocation activities, and human resource programs. Among its financial responsibilities, this function develops, implements, and evaluates policies and programs that meet LMSB's unique strategic human resource needs. M&F formulates the submission of the LMSB budget, develops the LMSB plan, manages resource distributions, and ensures that financial plans support division priorities. In addition, M&F coordinates management control and annual assurance activities; tracks the use of resources; and establishes financial policies, procedures, and controls in coordination with overall Service guidelines and the Service-wide CFO. M&F also develops, implements, and evaluate policies and programs that meet LMSB's unique strategic human resource needs.

Business Systems Planning

The Business Systems Planning Office (BSP) gathers and articulates business needs for all aspects of "major" change projects filling the gap between baseline capabilities and strategic vision. BSP is the repository of project management of expertise in the operating

division. Because Information Technology (IT) underlies most new business practices, BSP manages all new major IT projects, applications, and legacy systems changes. In addition, BSP is a high level interface with customer executives and the Division Information Officer. This interaction provides ongoing support for technology issues. BSP also identifies business needs and technology solutions, advising the LMSB leadership of their potential impacts on LMSB business initiatives.

Communications and Liaison

The Communications and Liaison (C&L) Office is responsible for the strategic management of LMSB's communications and liaison activities with internal and external stakeholders. C&L serves as LMSB's point of contact for Congressional liaison, national practitioner liaison, and other external stakeholders including media outlets. In addition, C&L provides guidance and assistance on certain controlled or regulated activities, including Fed/State and Fed/Fed programs, Disclosure, and reviews by TIGTA and GAO. C&L also develops and manages an internal communications infrastructure to help LMSB foster open communications throughout the organization.

Equal Employment Opportunity and Diversity

LMSB's EEO and Diversity Office (EEOD) establishes and implements EEO and Diversity policies, procedures, and programs for the Division, in accordance with overall Service guidelines. EEOD advises the LMSB Commissioner and the LMSB management officials on EEO and Diversity issues; provides training to LMSB staff on EEO-related matters and issues; establishes division policy on reasonable accommodations, sexual harassment, and other EEO-related issues; and ensures that IRS and LMSB EEO/Diversity policies are properly implemented. EEOD identifies and analyzes LMSB trends in the areas of EEO complaint patterns and recommends/develops solutions. In addition, EEOD works with LMSB Human Resources to identify and address recruitment, retention, and promotional barriers. EEOD also plays a key role in developing and implementing employee satisfaction initiatives, as well as implementing the LMSB strategic plan.

Communications, Technology, and Media Industry

Industry Director

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Walter Harris

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Industry Headquarters

Cliff Jernigan

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*Responsibility: Groups
located in AL, CT, GA, IL,
MS, MD, MO, NJ, NY
& PA*

Kay Fenton

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Territory Managers

Ramona Feliciano

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*Responsibility: Groups
located in CO*

Field Operations

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*Responsibility: Groups
located in AR, CA, CO,
NV, TX & WA*

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*Responsibility: Groups
located in Manhattan*

Jacob Meyer

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*Responsibility: Groups
located in CA & WA*

Patricia Leatherwood
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*Responsibility: Groups
located in IL & MO*

Alan McWilliams
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*Responsibility: Groups
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*Responsibility: Groups
located in NJ*

Paul J. Rinaldi
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*Responsibility: Groups
located in CT & NY
(except Manhattan)*

Bill Roth
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*Responsibility: Groups
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*Responsibility: Groups
located in Northern CA*

Erwin Walker
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*Responsibility: Groups
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*Responsibility:
International groups
located in CA & WA*

Eileen Jannazzo
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*Responsibility:
International groups
located in NY*

Financial Services Industry

Industry Director

Paul DeNard

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Patricia C. Chaback

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Responsibility: Groups located in CT, IA, IL, MA, ME, MN, MO, NH, NY, OH, RI, & WI

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Territory Managers

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Responsibility: Groups located in MA, ME & NH

Field Operations

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Cheryl P. Claybough

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Responsibility: Groups located in Manhattan & NJ

Responsibility: Groups located in CT, DC, MD, NC, NJ, NY, OH, PA & VA

Woody K. Howell

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Responsibility: Groups located in MA & RI

Eugene McBride
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*Responsibility: Groups
located in DC, NC, OH &
VA*

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*Responsibility: Groups
located in MN & WI*

James J. Rooney
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*Responsibility: Groups
located in IA & IL*

Phyllis Newman
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*Responsibility: Groups
located in Manhattan*

Robert C. Skiba
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*Responsibility: Groups
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Carl Weiss
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*Responsibility: Groups
located MD & PA*

Charles Utter
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*Responsibility:
International groups
located in CT & NY*

Howard S. Martin
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*Responsibility:
International groups
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OH & WI*

Heavy Manufacturing and Transportation Industry

Industry Director

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Responsibility: Groups located in CA, FL, GA, IA, IL, LA, MI, MO, MS, NE, OH, & TX

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Territory Managers

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Responsibility: Groups located in MD, NJ & VA

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Responsibility: Groups located in IA, IL & OH

Responsibility: Groups located in CT, FL, MA, MD, NJ, NY, PA, RI & VA

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Responsibility: Groups located in MI

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*Responsibility: Groups
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Linda Petrillo

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*Responsibility: Groups
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*Responsibility: Groups
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*Responsibility: Groups
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*Responsibility: Groups
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*Responsibility: Groups
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*Responsibility:
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Natural Resources and Construction Industry

Industry Director

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Responsibility: Groups located in AK, AZ, CA, ID, KS, MO, NM, OK, OR,

Territory Managers

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Responsibility: Groups located in DE, VA & WV

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Field Operations

Sergio Arellano

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Responsibility: Groups located in NM, OK & TX

Steve Gagne

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Responsibility: Groups located in DE, IL, IN, LA, MI, NC, NJ, OH, OK, PA, SC, TX, VA & WV

Responsibility: Groups located in TX

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*Responsibility: Groups
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*Responsibility: Groups
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*Responsibility: Groups
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WA & WY*

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*Responsibility: Groups
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*Responsibility: Groups
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*Responsibility: Groups
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*Responsibility: Groups
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*Responsibility: Groups
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*Responsibility:
International groups in CA*

Retailers, Food, Pharmaceuticals, and Healthcare Industry

Industry Director

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Industry Headquarters

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Field Operations

Jlm Sevier

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*Responsibility: Groups
located in AR, AZ, CA,
CO, HI, IL, MN, MO, TN,
TX & KY*

*Responsibility: Groups
located in CT, DE, GA,
MI, NC, NJ, NY, OH, PA,
TN & VA*

Territory Managers

Ned Connelly

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*Responsibility: Groups
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Susan Kass

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*Responsibility: Groups
located in IL*

Carolyn Lewis

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*Responsibility: Groups
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*Responsibility: Groups
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Lori Nichols

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