

# LEGAL AID SOCIETY OF MIDDLE TENNESSEE AND THE CUMBERLANDS

INFORMATION FOR RELEASE

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## **NEW GRANTS RECOGNIZE THE TENNESSEE TAXPAYER PROJECT AS ONE OF THE TOP PROGRAMS IN THE COUNTRY**

*IRS-funded project teaches taxpayers about rights and responsibilities;  
Helps resolve disputes with the IRS.*

OAK RIDGE, Tenn. April 17, 2008 – Grants from two different funders show that the Tennessee Taxpayer Project is one of the top taxpayer advocacy programs in the nation. The IRS has awarded the Project \$97,250. Only six of the 154 IRS-funded programs in the nation received this level of support. The funding will help the Project accomplish two goals -- to inform low-wage taxpayers of their rights and responsibilities and, ironically, to represent them in resolving disputes with the IRS.

The Project received a second grant of \$29,800 from the Community Tax Law Project in Richmond, Virginia. This will support the Tennessee Taxpayer Project's efforts to mentor and advise other tax clinics around the county. This grant, too, was the maximum amount awarded to a support organization.

The Tennessee Taxpayer Project is a program of the Legal Aid Society. It has attorneys in Nashville and Oak Ridge who serve taxpayers throughout the state on disputes with the IRS.

“The Tennessee Taxpayer Project is widely recognized as one of the most effective taxpayer advocacy programs in the country,” said Neil McBride, general counsel for the Legal Aid Society. “In addition to providing tremendous assistance to working Tennesseans, the Project is a leader in helping other programs get started and become more effective.”

The Project has a staff of three: Coordinator Mary Gillum, who is an accountant and attorney, attorney Robert Nadler, a 30-year veteran of the IRS, and outreach advocate Paula Trujillo, who has successfully involved immigrant people and organizations across the state in the Project's work.

For the past three years, the Project has gained more than \$1.5 million a year in actual benefits for low-wage Tennesseans. Many of these clients are victims of domestic

violence (who are often cheated by their abusive spouses) and documented immigrant workers.

In announcing the grants, Coordinator Mary Gillum acknowledged that the public is often surprised to learn that low-wage workers have serious tax problems. “Most low-income people are workers who must negotiate our complex tax system like everyone else,” she said. “In fact, they often have special circumstances that make filing taxes more difficult, such as immigration status, medical bills, previous tax troubles and how to prove they support children and other dependents.”

For example, “Jane” suffered from a series of medical problems that required three brain surgeries. Her only income was Social Security disability. Just after her first surgery, she received an IRS notice of a federal income tax debt of more than \$28,000.. A veterinary hospital in Florida had reported that it had forgiven a debt of over \$71,000, which then counted as income to Jane. The IRS levied Jane’s Social Security check. She had to use money for medications to pay living expenses. Jane called the Tennessee Taxpayer Project.

“Our investigation showed that Jane never owed or debt or had a relationship of any kind to the hospital, and in fact had never been to Florida,” said her attorney Bob Nadler in the Project’s Nashville office. “But the IRS refused to remove the debt unless the hospital corrected the form it submitted.”

The hospital would not cooperate. The Project tried to settle the dispute by negotiation. When the IRS would not negotiate, it filed for a formal hearing and got the debt and levy removed.

“Without the assistance of the taxpayer project, Jane could have become homeless,” Nadler said. “She could not have afforded to pay for basic living expenses such as her medications.”

Nadler explained that this kind of problem happens over and over again. “That’s why the IRS understood that it should fund this kind of advocacy for people who can’t afford a tax lawyer.” He said the Project does not prepare tax returns. “We do assist clients, who are often overwhelmed by the tax system, by helping them understand the tax laws and explaining their position to the IRS. We are often able to achieve very good results for our clients.”

The Legal Aid Society gives free legal aid to people who have nowhere else to turn. It serves 48 counties from offices in Nashville, Gallatin, Clarksville, Murfreesboro, Columbia, Tullahoma, Cookeville and Oak Ridge.

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