

IN THE UNITED STATES DISTRICT COURT
FOR THE DISTRICT OF COLUMBIA

Adam Steele, Brittany Montrois, and)	
Joseph Henchman, on behalf of)	
themselves and all others similarly)	
situated,)	
<i>Plaintiffs,</i>)	
)	
v.)	Civil Action No.: 1:14-cv-01523-RCL
)	
United States of America,)	
<i>Defendant.</i>)	
_____)	

JOINT STATUS REPORT

On January 24, 2023, this Court remanded this matter to the IRS to determine an appropriate refund for the class. (ECF 222 (“Order”)). The Order also required the parties to file a joint status report every 30 days informing the Court of the “IRS’s work on remand until such time as that work is complete.” *Id.* The parties submit this joint status report as required by the Order.

United States:

The United States reports as follows: during the past 30 days, counsel for the United States and the IRS continued to work on developing the methodology and process for calculating a refund for the class in accordance with the Court’s order and held regular meetings with the IRS regarding the IRS’s work on remand. The IRS has reached a preliminary determination as to the IRS portion of the user fee and has submitted that calculation to the appropriate officials for review and approval.

The IRS continues to work on costs associated with the various Return Preparer Office components, and the pro rata calculation of the vendor fee as reported in the June Status Report. Although a final calculation on the vendor fee has not been determined, the IRS has made progress over the last 30 days towards resolution for the purposes of its work on remand. Nothing reported in this Status Report shall be deemed an admission of any kind or waiver of any appeal right.

Position of Plaintiffs' Co-Counsel Allen Buckley. As stated in last month's filing: Except for ghost preparer costs and foreign preparer identification costs (which are under consideration by the Court), Plaintiffs' co-counsel Allen Buckley (a CPA) has prepared a reasonable estimate of the costs of issuing and renewing PTINs (and maintaining a PTINs database) in a manner believed (by Allen Buckley) to be in accordance with the costs terms of the Court's order dated January 24, 2023, for IRS fiscal years ended in 2011, 2012, 2013, 2014, 2015, 2016 and 2017 (i.e., the years for which the IRS was directed to calculate PTIN related costs). Mr. Buckley worked on numerous other clients' matters during the time period in which he assembled the estimate.

Dated: July 21, 2023

Respectfully submitted,

/s/ William H. Narwold
MOTLEY RICE LLC
William H. Narwold
bnarwold@motleyrice.com
D.C. Bar No. 502352
One Corporate Center
20 Church Street, 17th Floor
Hartford, CT 06103
Telephone: (860) 882-1676
Facsimile: (860) 882-1682

/s/ Stephanie A. Sasarak
STEPHANIE A. SASARAK
EMILY K. MILLER
JOSEPH E. HUNSADER
BENTON T. MORTON
Trial Attorneys, Tax Division
JOSEPH A. SERGI
Senior Litigation Counsel
U.S. Department of Justice
Tax Division
Post Office Box 227

MOTLEY RICE LLC
Meghan S. B. Oliver
moliver@motleyrice.com
Charlotte Loper
cloper@motleyrice.com
Ebony Bobbitt
ebobbitt@motleyrice.com
28 Bridgeside Boulevard
Mount Pleasant, SC 29464
Telephone: (843) 216-9000
Facsimile: (843) 216-9450

Ben Franklin Station
Washington, DC 20044
Telephone: (202) 307-2250
Facsimile: (202) 514-6866
Joseph.A.Sergi@usdoj.gov
Joseph.E.Hunsader@usdoj.gov
Stephanie.A.Sasarak@usdoj.gov
Emily.K.Miller@usdoj.gov
Benton.T.Morton@usdoj.gov
*Attorneys for Defendant United States of
America*

Counsel for Plaintiffs

LAW OFFICE OF ALLEN BUCKLEY LLC
Allen Buckley
ab@allenbuckleylaw.com
2727 Paces Ferry Road, Suite 750
Atlanta, GA 30339
Telephone: (678) 981-4689
Facsimile: (855) 243-0006

GUPTA WESSLER PLLC
Deepak Gupta, Esq.
deepak@guptawessler.com
Jonathan E. Taylor
jon@guptawessler.com
1735 20th Street, NW
Washington, DC 20009
Telephone: (202) 888-1741
Facsimile: (202) 888-7792

CAPLIN & DRYSDALE, CHARTERED
Christopher S. Rizek, Esq.
crizek@capdale.com
One Thomas Circle, NW, Suite 1100
Washington, DC 20005
Telephone: (202) 862-8852
Facsimile: (202) 429-3301

Additional Counsel for Plaintiffs

CERTIFICATE OF SERVICE

I hereby certify that on July 21, 2023, I electronically filed the Joint Status Report in the CM/ECF system. I understand that notice of this filing will be sent to all parties by operation of the Court's electronic filing system.

/s/ Stephanie A. Sasarak
STEPHANIE A. SASARAK
Trial Attorney, Tax Division
U.S. Department of Justice