

3652 N.W. 85th Avenue
Cooper City, FL 33024

April 23, 2017

The Tau Beta Sigma National Council (a/k/a The Nominations Committee for the Tau Beta Sigma Board of Trustees)
Dr. Kathryn Kelly, President
Mr. Jonathan Markowski, Vice President for Colonization and Membership
Ms. Adrienne Rall, Vice President for Special Projects
Ms. Erika Pope, Vice President for Communications and Recognition
Ms. Beth Bronk, Vice President for Professional Relations

P.O. Box 849
Stillwater, OK 74076

Dear Dr. Kelly and the Tau Beta Sigma National Council:

This letter is being written to officially announce my candidacy for an elected position to the Tau Beta Sigma Board of Trustees for the 2017-2021 term.

After reviewing the requirements as outlined in the Tau Beta Sigma constitution, I believe that I exceed the minimum requirements for candidacy. I was a member of the Tau Beta Sigma Board of Trustees from 2001 – 2009, chairing the Board for the 2007-2009 biennium. I have raised a great deal of money for the Tau Beta Sigma Trust Fund, and I'd like to continue doing so over the next four years as a Board member.

I am running for this position because I believe that I can be a very large asset to the Board. I have outstanding business and professional skills for this position, and my professional background will allow me to make suggestions to the Board for maximization of the trust fund. My professional experience, along with my education has proven to be an invaluable asset to the Board in the past, and could be an invaluable asset to the Board in the future.

Besides having a professional career in the accounting field for 31 years, I have worked as a technical specialist for the Internal Revenue Service for 26 years. I have shown many people that I have outstanding leadership skills, which is a key requirement of my last three jobs with the Service, including Appeals Team Case Leader, Technical Guidance Coordinator, and Team Coordinator. On these jobs, I have argued Federal income tax issues with the top tax attorneys in the country from the largest of law firms, as well as the top CPA tax practitioners from all of the big four accounting firms, as well as others. I have gained the utmost of respect from the individuals that I have worked with, and I would like to use this experience to help our great Sorority strive in the future.

Enclosed are my professional and sorority resume, three letters of recommendation, including one from someone in my professional field, and a photograph of myself. This package as a whole shows my qualifications for the position being sought and why I am a great candidate. I look forward to you considering my candidacy and for further discussions on this topic.

Sincerely yours,

Alan J. Harriet

Alan J. Harriet, MBA, CPA

Enclosures: Professional and Sorority Resume, Three Letters of Recommendation, and a Photograph of Alan Harriet

ALAN J. HARRIET
3652 N.W. 85th Avenue
Cooper City, Florida 33024

Home Phone - (954) 438-0677

E-Mail Address – a.harriet@att.net

Work Phone - (954) 423-7956

Cell Phone - (954) 296-6366

TAU BETA SIGMA BOARD OF TRUSTEES (July 2001 – July 2009)

- Board of Trustees Chair – (September 2007 – July 2009)
- Board of Trustees Secretary – (July 2003 – July 2007)
- Liaison to the Investment Broker and Budget Preparer – (July 2003 – July 2007)
- Chaired the Wava Award Subcommittee (May 2004 – July 2004)
(The other subcommittee Board member was Wava Baner Henry)
- Raised over \$17,500 for the Tau Beta Sigma Trust Fund (July 2001 – July 2009)
- Devised a plan to endow the Board of Trustees scholarship and Wava Award (2004)
- Board of Trustees Scholarship Liaison – (July 2001 – July 2003)
- Prepared analytical financial data for Board examination – (July 2001 – July 2009)
- Wrote several Podium and district publication articles – (July 2001 – July 2009)
- Wrote several sections of the Board of Trustees handbook – (2004)
- Conventions and Events Attended as a Board Member:

National Level

National Conventions (5) – Corpus Christi, TX – July 2001, Norfolk, VA – July 2003, Lexington, KY – July 2005, Orlando, FL – July 2007, Scottsdale, AZ – July 2009

District Leadership Conferences (4) – Stillwater, Oklahoma – July 2002, July 2004, July 2006, and Oklahoma City – July 2008

9/11 Commissioned Piece Debut – Tallahassee, Florida - October 2002

District Level

Midwest District Conventions (4) – Springfield, MO – 2002, Bozeman, MT – 2004, Ames, IA – 2006, Cedar Falls, IA - 2008

North Central District Conventions (4) – Bloomington, IN - 2002, Columbus, OH – 2004, Covington, KY – 2007, Toledo, OH - 2009

Northeast District Conventions (4) – Pittsburgh, PA – 2002, Kutztown, PA – 2004, Richmond, VA – 2006, Blacksburg, VA - 2008

Southeast District Conventions (8) – Atlanta, GA – 2002, Tallahassee, FL – 2003, Tuskegee, AL – 2004, Orlando, FL – 2005, Greenville, SC – 2006, Atlanta, GA – 2007, Tallahassee, FL – 2008, Columbia, SC - 2009

Southwest District Conventions (4) - Waco, TX – 2003, Norman, OK – 2005, Stillwater, OK – 2007, Baton Rouge, LA - 2009

Western District Convention (4) – San Diego, CA – 2003, Tucson, AZ – 2005, Ontario, CA – 2006, Boise, ID - 2008

OTHER TAU BETA SIGMA INVOLVEMENT

Other National Conventions Attended (7) – Stillwater, OK – 1989, West Lafayette, IN – 1993, Orlando, FL – 1995, Scottsdale, AZ – 1997, St. Louis, MO – 1999, Colorado Springs, CO – 2011, Springfield, MA - 2013

Other District Conventions Attended (9) – Midwest District – 2012, Northeast District – 2013, Southeast District – 1984, 1988, 1989, 1997, 2010, 2017, Southwest District – 2017

Tau Beta Sigma Alumni Association Charter Member (2007 – Today)

National Alumni Association Charter Member – (2001 – 2007)

Life Membership in Tau Beta Sigma – (March 7, 1986 – Number 1581)

Active Member of Gamma Epsilon Chapter, University of Miami (November 20, 1983 – March 7, 1986)

Board of Trustees Advisory Board and Finance Committee – (2011 – Today)

Strategic Thinking Sisters Committee–2012 (w/Jean Newman, Chair, Debbie Kaplan, &Melanie Meehan)

ALAN J. HARRIET
3652 N.W. 85th Avenue
Cooper City, Florida 33024

HONORARY MEMBERSHIPS AND AWARDS

Tau Beta Sigma National Honorary – 2011 – Colorado Springs, CO
Tau Beta Sigma Southeast District Honorary – 2010 – Gainesville, FL
Tau Beta Sigma Midwest District Honorary – 2006 – Ames, IA
Kappa Kappa Psi National Honorary – 2009 – Scottsdale, AZ
Tau Beta Sigma Distinguished Service Award Recipient - 2011
Wava Banes Turner Award Recipient - 2001

BAND INVOLVEMENT

Greater Miami Symphonic Band – (1987 – Today) – Trombone Principal (1996 – Today)

University of Miami Band of the Hour Association of Alumni and Friends – President (2006-08), Vice President (2004-08), Board Member (1993-Today) (Off and On)

OCCUPATION

United States Department of the Treasury - Internal Revenue Service (June 17, 1991 – Today)

- Office of Appeals (April 2009 – Today)
 - Appeals Team Case Leader (May 2014 –Today) – I am a lead Appeals Officer for the largest corporations in the world
 - National Technical Guidance Coordinator for partnerships and conservation easements (April 2009 – May 2014) – I advised Appeals employees in settling cases in these two areas
 - Trained mediator by the Federal Mediation and Reconciliation Board (2013)
- Large-Middle Size Business Division Team Coordinator and Member (2000 – April 2009)
- General Program Revenue Agent (June 17, 1991 – 2000)
South Florida District Technical Issue Specialist for Passive Activity Losses
Also examined closely held corporations

Certified Public Accountant (April 1990 – May 15, 1991)

- Worked at several CPA firms specializing in financial statement audits, tax, and management advisory services

Public Accountant (August 1986 – April 1990)

- Worked at several CPA firms specializing in financial statement audits, tax, and management advisory services

Continuing Professional Education Instructor (1987 – Today)

EDUCATION

Master of Business Administration – Concentration in Finance – Barry University (1991)

Bachelor of Business Administration – University of Miami (1985)

Certified Public Accountant Certificate – State of Florida – April 1990 - Today

MEMBERSHIPS

American Institute of Certified Public Accountants
Florida Institute of Certified Public Accountants – Gold Coast Chapter Board of Directors (2009 – Today)





Jean Newman

916-752-0533 tbshasbeen@aol.com 31500 Grape Street Suite 3 PMB 370 Lake Elsinore, CA 92532

April 22, 2017

Dr. Kathryn Kelly, M.D., National President
Tau Beta Sigma
P. O. Box 849
Stillwater, OK 74076

Dear Kathryn,

It is with great pleasure that I send you this letter of recommendation for Alan J. Harriet, as he presents himself to the National Council and membership of Tau Beta Sigma as a candidate for the Board of Trustees. I have known Alan since 1989 and have served on the Board of Trustees twice with Alan. His love of the Sorority is to be admired and his dedication to ensuring the future of TBS for others is second to none.

Alan's professional experience as a CPA and IRS auditor for over 25 years allows him to understand the Sorority's financial reports and goals easily. He is an articulate, professional communicator and offers thoughtful questions and long term thought processes in his financial discussions. In his previous terms on the Board during which I served with him, Alan was an active participant in every Board activity. He attended numerous District Conventions, building relationships with students and National Council Members, both in Tau Beta Sigma and Kappa Kappa Psi with ease.

Alan's loyalty as a Sister and Brother is undeniable. His years of service and past accomplishments show his relentless dedication to continue to serve the Sorority and bands. I cannot think of a more suitable candidate for the Board of Trustees than Alan Harriet.

Sincerely yours,

Jean Newman

Past National President, Tau Beta Sigma, 1993-1995

Past Chair, Board of Trustees, Tau Beta Sigma

Herbert Cantor, CPA, CGMA, MST
7902 N.W. 109 Lane
Parkland, Florida 33076

March 23, 2017

Dr. Kathryn Kelly
Tau Beta Sigma National Council
P.O. Box 849
Stillwater, OK 74076-0849

Dear Dr. Kelly:

I am writing this letter on behalf of my fellow associate, Alan Harriet. I have known him for about 15 years. Alan and I worked in the same large case IRS examination group for 7 years.

Please let this letter serve as a recommendation for Alan to serve on the Tau Beta Sigma Board of Trustees. I would highly recommend Alan for any position. He is smart, trustworthy, motivated, dedicated, and enthusiastic about his job. If anyone in our organization ever needs help, he is the one we call. He has always been helpful to me when I have questions and he has always been willing to help others in our organization to resolve any problems they may have. He is an asset to our organization, a pleasure to work with, and well respected. He would be an asset to your organization also, as he gets things done.

In conclusion, if you have any further questions, please feel free to contact me anytime at 954-646-7540. Thank you for your attention to this matter.

Sincerely,

Herb Cantor

Herbert Cantor., CPA, CGMA, MST

April 10, 2017

To whom it may concern:

I hereby recommend Alan J. Harriet as a candidate for the Board of Trustees for Tau Beta Sigma for the upcoming board term, to begin in the summer of 2017.

Having previously served on the Board of Trustees for Tau Beta Sigma, and eventually becoming its chair, Alan has had a wealth of experience needed for this job. In his capacity as a Board of Trustees member, he has had a wide variety of experience, including writing information for the Board of Trustees handbook, submitting articles to the Podium, scholarship involvement and lending his financial expertise. And last, but not least, he has helped raise a substantial amount of money for the Tau Beta Sigma Trust Fund.

On a professional level, he has the education, professional knowledge and work experience needed for this position. He has worked in the financial and tax industries for over 25 years, and his expertise in these fields make him an ideal candidate for the Tau Beta Sigma Board of Trustees.

He has remained active in Tau Beta Sigma over the years on the local, district and national levels, noted by his attendance at many district and national conventions, and has served on several committees at a number of district and national conventions as well. He also has been bestowed several awards for Tau Beta Sigma, and has been granted honorary membership in Tau Beta Sigma and Kappa Kappa Psi at both the district and national levels. He has remained active in music in the community by participating in his local community band.

On a personal level, I have known Alan for several years, and during that time we have developed a good friendship. I know him to be a very trustworthy, pleasant, knowledgeable and reliable person. When he says he is going to do something, he makes every effort to do so in a timely manner, and if that is not possible, he lets the appropriate contacts know that he is working on it.

Once again, I wholeheartedly feel that Alan J. Harriet is an excellent candidate for the upcoming Board of Trustees term for Tau Beta Sigma. Should you have any questions for me regarding this matter, you may contact me by using any of my contact information found below.

In the bonds,

Bev Cohen
Life member
Zeta Delta, Tau Beta Sigma

University of Kansas

Tau Beta Sigma Honorary - Midwest District

Kappa Kappa Psi Honorary - Midwest District

Member - Tau Beta Sigma Alumni Association

Member - Midwest District Alumni Association

Member - Tau Beta Sigma History and Archives committee

Recipient - Tau Beta Sigma Alumni Association Distinguished Alumni Award

Contact information

Address - 8826 Eby Drive

Overland Park, KS 66212

Home phone - 913-648-5104

Cell phone - 913-271-8650

Email address - auntbev1@yahoo.com