Tax Tutors

On weeknights and Saturdays during tax season, Robert Burke, M.B.A. ’99, and his Ladder Up volunteers can be found at work throughout the Chicago area, helping low-income families keep as much of their income as possible. Ladder Up’s free financial services educate clients about tax credits and aid for higher education; the nonprofit (www.goladderup.org), which Burke founded in 1994 and still chairs, estimates saving clients an average of $150 in fees typically charged by commercial firms, and often more. In its first year, Ladder Up returned $150,000 to the community it served. Since then, some 16,000 volunteers have helped return more than $147 million to 84,000 families.

Filing taxes “is a daunting task, and the system isn’t getting less complicated,” says Burke. Volunteers from more than 250 local companies, including banks and law and accounting firms, work with low-wage earners accustomed to relying on check-cashing and money-wiring services that charge more than traditional banks. Volunteers need only a “sharp mind and sharp pencil,” says Burke, not an accounting degree; they are trained to maximize clients’ tax credits, sometimes with life-changing results. (One woman discovered the IRS owed her $10,000.) To find clients, Ladder Up partners with community groups—churches, schools, YMCAs—that provide space or publicity.

Burke, who now works in private equity, began Ladder Up as a 22-year-old employee at Arthur Andersen; he wanted to assist the families of the children he coached in basketball on Chicago’s West Side. He wrote a business plan and approached his managers, explaining that his colleagues would become “better people and business professionals” if they learned how to serve an entirely new population: the working poor. Both company and employees responded enthusiastically. Fourteen years later, Ladder Up offers its clients classes on financial literacy as well. “You’re amazed at the courage of those you’re trying to help,” Burke says. “They’re doing so much with so little. What we try to do as an organization is put more tools in their toolbox.” ~BRITTNEY MORASKI

Vote Now

This spring, alumni will choose five new Harvard Overseers and six new directors for the Harvard Alumni Association (HAA) board. Ballots should arrive by mail by April 15 and are due back in Cambridge by noon on May 29 to be counted. Election results are announced at the HAA’s annual meeting, on the afternoon of Commencement day, June 4. All Harvard degree-holders, except Corporation members and officers of instruction and government, are entitled to vote for Overseer candidates. The election for HAA directors is open to all degree-holders.

For Overseer (six-year term), the candidates are:

- Photine Anagnostopoulou ‘81, M.B.A. ’85, New York City. COO, New York City Department of Education.
- Morgan Chu, J.D. ’76, Los Angeles. Partner, Irell and Manella LLP.
- Walter Clair ’77, M.D. ’81, M.P.H. ’85, Nashville, Tennessee. Assistant professor of clinical medicine, Vanderbilt University Medical Center; clinical director of cardiac electrophysiology, Vanderbilt Heart and Vascular Institute.
- Margaret A. Levi, Ph.D. ’74, Seattle. Bacharach professor of international studies, University of Washington; professor of politics, University of Sydney.
- Cristian Samper, Ph.D. ’92, Washington, D.C. Director, National Museum of Natural History, Smithsonian Institution.

In addition, at least two alumni are apparently running as petition candidates for Overseer:

- Robert L. Freedman ’62, Philadelphia. Partner, Dechert LLP.

(If the petition filing deadline, February 9, fell after this issue went to press.)

For Elected Director (three-year term), the candidates are:

- Paul Choi ’86, J.D. ’89, Chicago. Partner, Sidley Austin LLP.
- Carlos Cordeiro ’78, M.B.A. ’80, Hong Kong. Retired partner, Goldman Sachs.
- Cindy Maxwell ’92, M.D. ’96, Toronto.
Assistant professor of obstetrics and gynecology and staff perinatologist, Mount Sinai Hospital.

Elizabeth Ryan ’81, Los Angeles. Producer and director for film and television.


John Trasvina ’80, Los Angeles. President and general counsel, Mexican American Legal Defense and Educational Fund.

Meg Vaillancourt ’78, Boston. Vice president, corporate and community affairs, Boston Red Sox.

Congratulations
The HAA clubs committee awards honor individuals who provide exemplary service to a Harvard club or shared interest group (SIG), as well as to clubs and SIGs that have organized exceptional programming. Awards were presented to the following recipients at the HAA Board of Directors winter meeting on February 5 at the Charles Hotel.

R. Clive Gard, AMP ’78, of Australia. A member of the Harvard Club of Australia for 25 years, Gard has served as councilor on the executive committee and as club administrator. He has professionalized club operations, enriched the alumni experience, and strengthened programs focused on education, scholarship, and philanthropy.

John F. Kirk, CSS ’90, of San Antonio. Kirk has served Harvard in various roles, including past president of the Harvard Club of San Antonio, former HAA regional director for Texas, and former HAA national chair for the Early College Awareness Program, which grew considerably under his leadership.

The Harvard Club of San Francisco, founded in 1874, has increased and diversified its activities within the last three years, and seen membership grow from 200 to nearly 1,400 people. The club now operates about a hundred events annually, from community-service activities to lectures and ice-cream tastings. In the last decade, it has also initiated an award for human-rights leadership and created a college mentorship program for inner-city high-schoolers.

The Harvard Glee Club Foundation supports the Glee Club logistically and financially, and organizes reunion sings and summer-reunion tours. (The Glee Club, America’s oldest college chorus, celebrated its sesquicentennial last April; see “150 Years of Glee,” March-April 2008, page 69.)

Comings and Goings
This spring, Harvard clubs offer varied social and intellectual events, including University-affiliated speakers (see a partial list below). For more information, contact clubs directly, call the HAA at 617-495-3070 or 800-654-6494, e-mail clubs@harvard.edu, or visit www.haa.harvard.edu.

On March 5, the Harvard Club of Houston hears Timothy Colton, Feldberg professor of government and Russian studies and director of the Russian Research Center, address “How to Deal with a Resurgent Russia.” Marshall Goldman, senior scholar in the Davis Center for Russian and Eurasian Studies, discusses his book Petrostate: Putin, Power, and the New Russia at the Harvard Club of Long Island (March 14), the Harvard Club of Phoenix (March 25), and the Harvard Club of Seattle (March 26).