



Tax Policy Center

Urban Institute and Brookings Institution

Speaker Biographies

The Honorable Jacob J. Lew was confirmed by the United States Senate on February 27, 2013, to serve as the 76th Secretary of the Treasury. Secretary Lew previously served as White House Chief of Staff. Prior to that role, Lew was the Director of the Office of Management and Budget (OMB), a position he also held in President Clinton's Cabinet from 1998 to 2001. Before returning to OMB in 2010, Lew first joined the Obama Administration as Deputy Secretary of State for Management and Resources. Before joining the State Department, Lew served as managing director and chief operating officer for two different Citigroup business units. Prior to that, he was executive vice president and chief operating officer of New York University, where he was responsible for budget, finance, and operations, and served as a professor of public administration. From 2004 through 2008, Lew served on the Board of Directors of the Corporation for National and Community Service and chaired its Management, Administration, and Governance Committee. As OMB Director from 1998 to 2001, Lew led the Administration's budget team and served as a member of the National Security Council. During his tenure at OMB, the U.S. budget operated at a surplus for three consecutive years. Earlier, Lew served as OMB's Deputy Director and was a member of the negotiating team that reached a bipartisan agreement to balance the budget. As Special Assistant to President Clinton from 1993 to 1994, Mr. Lew helped design AmeriCorps, the national service program.

Sally Katzen is a visiting professor at New York University Law School. As a leading policy expert on regulatory issues, among others, she has testified before Congress more than 70 times and has participated on panels for the National Academy of Science. Serving for eight years in the Clinton administration, Katzen was deputy director for management at the Office of Management and Budget (1999–2001), deputy assistant to the president for economic policy, deputy director for the National Economic Council (1998–99), and administrator for the Office of Information and Regulatory Affairs in OMB (1993–98), where she was the senior adviser to the president on regulatory policy and process. A native of Pittsburgh, Pennsylvania, Katzen has a bachelor's from Smith College and a JD from the University of Michigan Law School.

Steven Rosenthal is a senior fellow with the Urban-Brookings Tax Policy Center, where he researches, speaks, and writes on a range of federal income tax issues, with a particular focus on business taxes. Before joining TPC, Rosenthal spent over 25 years practicing law in Washington, DC, most recently as a partner at Ropes & Gray LLP. He was a legislation counsel with the Joint Committee on Taxation, where he helped draft tax rules for financial institutions, financial products, capital gains, and related areas. Last year, Rosenthal was a runner-up for *Tax Notes'* Tax Person of the Year. This year, he served as staff director of the D.C. Tax Revision Commission, where he helped develop, draft, and implement DC's tax reform package, which was recently enacted by the DC Council. He is the former chair of the taxation section of the District of Columbia Bar Association. Rosenthal has an AB and JD from the University of California, Berkeley, and an MPP from the Kennedy School of Government at Harvard University.



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John M. Samuels serves as a vice president and senior counsel for tax policy and planning of General Electric Co. Samuels is responsible for GE's worldwide tax organization and for its global tax planning and tax compliance operations. Before joining GE in 1988, he served as partner at Dewey Ballantine in Washington, DC, and New York City. From 1976 to 1981, Samuels served as the deputy tax legislative counsel and tax legislative counsel for the US Department of the Treasury in Washington, DC. He serves as a member of GE's Corporate Executive Council and the GE Pension Board. Samuels was a director of General Electric Capital Services Inc. and General Electric Capital Corporation, a subsidiary of General Electric Capital Services. Samuels is the chairman of the International Tax Policy Forum, a fellow of the American College of Tax Counsel, a trustee of the American Tax Policy Institute, and a member of The Business Roundtable tax coordinating committee. He is a member of the University of Chicago Law School visiting committee, was an adjunct professor of taxation at New York University Law School from 1975 to 1986, and has been a visiting lecturer at Yale Law School since 1997. Samuels is a graduate of Vanderbilt University and the University of Chicago Law School and earned an LLM in taxation from New York University Law School.

Stephen E. Shay is a professor of practice at Harvard Law School. Before joining the Harvard Law School faculty, Shay was deputy assistant secretary for international tax affairs in the US Department of the Treasury; before rejoining the Treasury Department in 2009, he was a tax partner for 22 years with Ropes & Gray LLP. Shay served in the Office of International Tax Counsel at the Department of the Treasury, including as international tax counsel, from 1982 to 1987. He has published scholarly and practice articles relating to international taxation and has testified for law reform before congressional tax-writing committees. Shay has had extensive practice experience in the international tax area and has been recognized as a leading practitioner in *Chambers Global: The World's Leading Lawyers*, *Chambers USA: America's Leading Lawyers*, *The Best Lawyers in America*, *Euromoney's Guide to The World's Leading Tax Advisers*, and *Euromoney's Guide to The Best of the Best*. He has been active in the American Bar Association Tax Section as a council director and chair of the committee on foreign activities of US taxpayers, in the American Law Institute as an associate reporter, in the American Tax Policy Institute as a member of the board of trustees, and in the New York State Bar Association Tax Section and the International Bar Association. A 1972 graduate of Wesleyan University, Shay earned his JD and MBA. from Columbia University in 1976.

Sarah Rosen Wartell became the third president of the Urban Institute in February 2012. A public policy executive and housing markets expert, Wartell was President Bill Clinton's deputy assistant for economic policy and the deputy director of his National Economic Council. At the Department of Housing and Urban Development from 1993 to 1998, she advised the federal housing commissioner on housing finance, mortgage markets, and consumer protection. In 2012, she was named a "Woman of Influence" by *HousingWire*. Wartell cofounded the Center for American Progress, serving as its first chief operating officer and general counsel. Later, as executive vice president, Wartell oversaw its policy teams and fellows. Her work focused on the economy and housing markets, and she directed the mortgage finance working group and "Doing What Works" government performance program. Ms. Wartell practiced law with the Washington, DC, firm of Arnold & Porter and was a consultant to the bipartisan Millennial Housing Commission.