

CSUN CENTERS/INSTITUTES ANNUAL REPORT FORM 2013-2014

Deadline for submission: September 15, 2014

Academic Year: 2013-2014

Name of Center/Institute:

The Bookstein Institute for Higher Education in Taxation

Name of Director: Rafi Efrat

Mail Drop: 8372

Website address:

<http://www.csun.edu/busgrad/bookstein-Institute>

College/Department: The David Nazarian College of Business & Economics
Department of Accounting & Information Systemems

Year Chartered: 2007 (re-chartered in 2012)

Charter Expiration Date: 6/2017

List office or space utilized by center: JH 1111, JH 1113, JH 1214

Provide a paragraph on how the center/institute's reported activities meets or aligns with the centers stated goals:

The Bookstein Institute for Higher Education in Taxation's activities are well aligned with its stated mission and goals. To promote its community outreach goal, the Institute serves low- income taxpayers who have disputes with the IRS. This free service is provided by undergraduate and graduate tax students under the supervision of a faculty member. In rendering community service, the Bookstein Tax Clinic provided more than 70 students over the past year with valuable clinical experience in the field of taxation. In addition, the Institute offers an educational outreach unit whereby trained students conduct workshops on tax issues affecting low-income taxpayers. The Institute facilitated 23

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educational workshops and community events over the past year serving more than 565 taxpayers.

It also awarded \$15,000 in scholarships to graduate and undergraduate accounting students over the past year and was awarded \$74,000 in grants from the U.S. Treasury Department to support the various community-outreach activities.

List faculty associated/affiliated with center:

John Balian
James Chapman
Rafi Efrat
Rob Razani
George Gans
Sharyn Fisk
Jacob Stein
Robert Johnson
Moshe Kushman
John Lilly
Frederick E. Wooldridge

List Advisory Board or Community Board Members:

Harvey Bookstein, CPA
John Balian, JD, MST
Sharyn Fisk, JD, LLM
Rafi Efrat, JD, JSM, JSD, CPA

Director

Date

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Date