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704-2023

Report

Appoint Kim Lohr and Sean Wallace and reappoint Adam Abplanalp to the Revenue Division Appeals Board

Accepted

As Mayor, I request Council confirmation of the following appointments to the Revenue Division Appeals Board:

Appointment	Term	Replacing
Kim Lohr	1/1/2021 – 12/31/2023	Harriet Strothers
Sean Wallace	1/1/2023 – 12/31/2025	Vacant

Reappointment	Term
Adam Abplanalp	1/1/2022 – 12/31/2024

APPOINTEE INFORMATION

[Adam Abplanalp, CPA](#)

Bio: Mr. Abplanalp is the founder and Chief Executive Officer of the Cobalt Group, Inc, a Portland CPA firm. His background includes serving as chief financial officer of several different start-up and established small businesses. He also worked in the financial services industry, where he did internal audit, risk management, information security, and fraud management work. He graduated from the University of Oregon with a bachelor's degree in accounting.

Statement of Interest: "To apply my accounting and business knowledge and experience to productively contribute to local government."

[Kim Lohr](#)

Bio: Ms. Lohr is a State and Local Tax Principal with Delap LLP with 30 years of experience in state and local taxation. She has previously worked as a state auditor, the tax departments for several Fortune 500 companies, as well as two other accounting firms. She has a bachelor's degree in accounting from the University of Washington. She provides state tax education to various

Introduced by

[Mayor Ted Wheeler](#)

Bureau

[Management and Finance;](#)
[Revenue Division](#)

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Requested Agenda Type

Regular

Date and Time Information

Requested Council Date

August 23, 2023

Time Requested

15 minutes

entities, including co-teaching a course on state taxation for the Washington State Tax Conference.

Statement of Interest: "I am interested in serving on the board to facilitate the timely resolution of appeals and assisting in the application of tax rules in an educated and impartial manner. I look forward to using my expertise to help others in interpreting and understanding the tax rules and regulations."

Sean Wallace, CPA

Bio: Mr. Wallace is a shareholder at Perkins & Co, a Portland CPA firm. He has 13 years of progressive experience working as a CPA advising clients on federal, state, and local tax matters. His prior experience specific to local tax matters includes representing the OSPCA as an advisor on the implementation of the new Metro tax. He graduated from the University of Oregon with bachelor's degrees in Spanish and Accounting.

Statement of Interest: "I'm an active CPA licensed and working in the local economy since 2010. Having a voice in the application of the technical interpretation of our regional tax matters is something that is very interesting to me. I look forward to the opportunity to apply the knowledge I've gained working over a decade with the local codes into the fair and accurate application of jurisdiction rules and regulations."

Respectfully submitted,

Ted Wheeler

Mayor

Impact Statement

Purpose of Proposed Legislation and Background Information

Due to the pandemic, three volunteer positions for the Revenue Division Appeals Board (formerly Business License Appeals Board) are vacant.

The term of Adam Abplanalp expired on December 31, 2021 and Mr. Abplanalp has agreed to be reappointed to the Board. The Board position held by Adam Abplanalp is to be appointed by the Mayor, and if reappointed, the three-year term would expire on December 31, 2024.

The term of Harriet Strothers expired on December 31, 2020. Ms. Strothers does not wish to be reappointed to the Board. This Board position will be filled by Kim Lohr. The Board position held by Ms. Lohr is also to be appointed by the Mayor, but subject to the approval of Multnomah County by intergovernmental agreement. This appointment has already been approved by Multnomah County. If appointed, the three-year term would expire on December 31, 2023.

The Board position that would be filled by Sean Wallace is to be appointed by the Mayor, and if appointed, the three-year term would expire on December 31, 2025.

Portland City Code section 7.02.295 D requires that appointments to the Board be made to provide an appropriate level of expertise in accounting methods and tax regulations. The potential appointees meet the qualifications required by the code and should serve both the public and the City of Portland well in any matters coming before the Board.

Financial and Budgetary Impacts

None. This legislation only relates to the filling of volunteer board positions.

Community Impacts and Community Involvement

The Board's decisions only apply to the specific facts and circumstances of a single taxpayer so their decisions are minimally impactful to the community as a whole. Outreach has been narrowly targeted due to the unique qualifications of the Board members (strong expertise in federal, state and local tax laws). However, significant outreach has been conducted toward increasing the diversity of the Board.

100% Renewable Goal

Not applicable.

Budget Office Financial Impact Analysis

No fiscal impact. Relevant appointment fill volunteer board positions.

Agenda Items

704 Regular Agenda in [August 23, 2023 Council Agenda](https://www.portland.gov/council/agenda/2023/8/23)
(<https://www.portland.gov/council/agenda/2023/8/23>)

Confirmed

Motion to accept the report: Moved by Mapps and seconded by Ryan.

Commissioner Rene Gonzalez Yea

Commissioner Mingus Mapps Yea

Commissioner Carmen Rubio Absent

Commissioner Dan Ryan Yea

Mayor Ted Wheeler Yea