Profile

Richard
First Name

W
Middle Initial

Trescb
Last Name

tresch@bc.edu
Email Address

17 Loker Street
Street Address

Suite or Apt

Natick, MA
City

MA
State

01760
Postal Code

What district do you live in? *

☑ Precinct 4

Home: (508) 655-6177
Primary Phone

Home:
Alternate Phone

Retired from Boston College July 2018
Employer

Professor Emeritus
Job Title

Which Boards would you like to apply for?

Senior Property Tax Exemption Study: Submitted

Are you a registered voter in the Town of Natick?

◉ Yes ○ No

Have you ever attended a Natick town meeting?

◉ Yes ○ No

Have you ever served on a board, committee, or commission in the Town of Natick?

○ Yes ◉ No

If yes, please list name(s) of board, committee or commissions, along with date(s) of service:

Interests & Experiences

Why are you interested in serving on a board or commission? Are there any changes you would like to see to these boards, committees and/or commissions?

Invited to apply by Sue Salamoff because of my expertise in public finance.

Are you a graduate of the Natick Community Services Citizen's Leadership Academy?

○ Yes ⦿ No

Please list any skills or specialized knowledge you can bring to these boards, committees and/or commissions.

On the faculty of the Economics Department at Boston College for 49 years until my retirement last July. My area of expertise is public sector economics, which includes government spending, taxation, and federalism (the economic relationships between federal.state, and local governments).

Please list any professional affiliations.

American Economic Association

Let us know what other specialized interests or hobbies you might have.

Nothing particularly specialized. Just the usual for a retiree: , tennis, travel, reading, and the like.

Tresch_CV_April_2019.doc

Upload a Resume

April 2019

CURRICULUM VITAE

NAME: Richard W. Tresch

TELEPHONE:
Office: (617) 552-3671
Fax: (617)-552-2308

E-MAIL: Tresch@bc.edu

MARITAL STATUS: Married, two daughters

DATE OF BIRTH: November 26, 1943 PLACE OF BIRTH: E. Cleveland, Ohio

EDUCATION:

Institution	Major	Degrees
Williams College	Economics	B.A., 1965
M.I.T.	Economics	Ph.D., 1973-February

ACADEMIC HONORS AND AWARDS:
- Phi Beta Kappa, Williams College
- Board of Editors, American Economic Review, March 1988-March 1991
- Named Massachusetts Professor of the Year, 1996, by the Carnegie Foundation for the Advancement of Teaching

FIELD OF CONCENTRATION: Public Sector Economics

THESIS TITLE: Estimating State Expenditure Functions, 1954-69 (Completed, February 1973)

TEACHING EXPERIENCE:

M.I.T., Teaching Assistant (two years), Macro and Micro Principles (undergraduate)

Boston College (forty-seven years), Principles, Public Finance (undergraduate), Tax Policy (undergraduate), Welfare Economics (undergraduate), Public Finance (graduate), Economic Theory Workshop (graduate), Independent Studies (undergraduate), and undergraduate Honors Research

POSITIONS HELD:

Chairman, Department of Economics, Boston College,1978-1982, Spring 1984, 1994-2000
Director of Graduate Studies, Department of Economics, Boston College, 2008-2016
Director of Undergraduate Studies, Department of Economics, Boston College, 2009-2010
Emeritus Professor, retired, July 1, 2018-present
Professor, 2002-2018
Associate Professor, 1975-2002
Assistant Professor, 1973-1975
Instructor, 1969-1973
President, Boston College Chapter of Phi Beta Kappa, 1976-2001

PROFESSIONAL ASSOCIATIONS:

American Economic Association

PUBLICATIONS

Two discussant papers presented at the New England Business and Regional Development Conference
Instructor's Manual for Basic Economics (with Richard Eckaus)
"State Governments and the Welfare System: an Econometric Analysis," Southern Economic Journal, July 1975
"Estimating State Expenditure Functions: An Empirical Test of the Time Series Informational Content of Cross Section Estimates,"," Public Finance, No. 3-4, 1974
"An Overview of a Quarterly Econometric Model of Massachusetts and Its Fiscal Structure," New England Journal of Business and Economics, Fall 1976
Public Finance: A Normative Theory, Business Publications, Inc., 1981 (graduate textbook)
Public Finance: A Normative Theory, Second edition, Academic Press, 2002; Third edition, Academic Press 2015; Fourth edition, Academic Press, under contract, forthcoming.
The Massachusetts Personal Income Tax, report to the Special Commission on Tax Reform, State of Massachusetts, October 30, 1986
"Fundamentals Relating to the Economic Functions of Government," in Warren J. Samuels, ed., Fundamentals of the Economic Role of Government, Greenwood Press (1989)
Principles of Economics (West Publishing Company), January 1994. (Separate annual revised editions of the Micro and Macro splits, Cengage Learning Custom Publishing, currently 15th edition)
Public Sector Economics, Palgrave Macmillan, 2008 (published in Korean as well as English)

Public Sector Economics: Critical Concepts in Economics, (ed.), Four Volumes (Public Expenditures, Taxation, Distribution, Federalism), Routledge Major Works Series, Routledge, October 2009

COMPLETED PAPERS: "Optimal Fiscal Federalism in a First Best Environment with Dynastic Social Welfare"

"Optimal Commodity Taxation and Public Production in a Federalist System of Governments with Dynastic Social Welfare"

"Explorations into the Production of State Government Services: Education, Welfare, and Hospitals," with Andrei Zlate.

SPONSORED RESEARCH:

"An Econometric Analysis of the Massachusetts Economy and Its Fiscal Structure," with Anne Friedlaender, George Treyz, prepared for the Massachusetts State Government

Boston College Mellon Foundation Grant, Summer 1982, to begin work on a state budgetary model

Boston College Research Expense Grant, Summer 1985, to continue work on state budgetary model

"Estimating the Demand for State Government Services"

CONSULTING:

Consultant for Educational Testing Service on development of an introductory level test in economics

Consultant for Charles River Associates (primarily antitrust litigation and rate-setting deliberations, both public and private sector)

Consultant for James W. Lawson, P.C. (Railroad freight regulation)

REVIEWING

American Economic Review
Contemporary Economic Policy
Economic Inquiry
Economic Letters
International Economic Review
International Taxation and Public Finance
Journal of Economic Education
Journal of Economics
Journal of Finance
Journal of Human Resources
Journal of Public Economics

Journal of Public Economic Theory
Oxford Economic Papers
Public Finance Review
Regional Science and Urban Economics
Social Choice and Welfare

Manuscript Reviews for: Business Publications
Little, Brown and Company
Longman
Richard D. Irwin
McGraw-Hill
Scott, Foresman
Prentice Hall

OTHER:

Presentation on "Welfare Reform: Shared Views and Disagreements," Alex G. McKenna Economic Education Series, Saint Vincent College, March 6, 1996.
External Reviewer: Economics Department, Stonehill College, 1994 and 2009.
External Reviewer: Economics Department, University of California-Riverside, 2016

Profile

Patricia
First Name

M
Middle Initial

Sciarra
Last Name

patti.sciarra@spftechnologies.com
Email Address

1 STEVEN CIR
Street Address

Suite or Apt

NATICK
City

MA
State

01760
Postal Code

What district do you live in? *

☑ Precinct 7

Home: (508) 650-0946
Primary Phone

Mobile: (774) 279-0440
Alternate Phone

Self Employed
Employer

CPA
Job Title

Which Boards would you like to apply for?

Senior Property Tax Exemption Study: Submitted

Are you a registered voter in the Town of Natick?

◉ Yes ○ No

Have you ever attended a Natick town meeting?

◉ Yes ○ No

Have you ever served on a board, committee, or commission in the Town of Natick?

◉ Yes ○ No

If yes, please list name(s) of board, committee or commissions, along with date(s) of service:

Currently a Town Meeting member for precinct 7, Current Board Member of the Natick Affordable Housing Trust, Current Treasurer - Friends of Natick Community Services, Current Chair of Natick Republican Town Committee

Interests & Experiences

Why are you interested in serving on a board or commission? Are there any changes you would like to see to these boards, committees and/or commissions?

I am interested in protecting the ability of Natick senior citizens to stay in their homes despite the rising cost of property taxes

Are you a graduate of the Natick Community Services Citizen's Leadership Academy?

(•) Yes ( ) No

Please list any skills or specialized knowledge you can bring to these boards, committees and/or commissions.

I am a Certified Public Accountant so have skills related to finance and tax

Please list any professional affiliations.

MA Society of CPA's, AICPA,

Let us know what other specialized interests or hobbies you might have.

Interested in spending time with family and friends, reading, genealogy, gardening, yarn and enjoying life.

Upload a Resume

PATRICIA SCIARRA

1 Steven Circle | (508)650-0946
Natick, MA 01760 | psciarra@verizon.net

EDUCATION

BENTLEY UNIVERSITY, Waltham, MA
Bachelor of Science in Accountancy — **Graduated October, 1983**
Masters of Science in Taxation — **Graduated November, 1990**

WORK EXPERIENCE

Self-Employed — **March 1990 - present**
Certified Public Accountant - Accounting practice specializing in bookkeeping and tax services for individuals and small businesses.

Price Waterhouse — **June 1985- February 1990**
Tax Manager **–** oversaw tax preparation for multistate business entities, foreign nationals and highly compensated individuals.
Senior Auditor **–** specialized in outside audits of banks and mutual funds.

CURRENT VOLUNTEER ACTIVITIES

Vice-President Natick Republican Town Committee
Natick Neighborhood Brigade
A Place to Turn

PAST VOLUNTEER ACTIVITIES

Natick Service Council - Holiday sponsorships
Catholic Memorial High School (2010-2011)
Marian High School Parents Association (2012-2015)
St. Paul Parents Teacher Association (2001-2009)
Adoption Community of New England, Treasurer (1998-2002)

OTHER

Town of Natick Citizen Leadership Academy – Graduate – November 2016

Profile

Andrew
First Name

D
Middle Initial

Eschtruth
Last Name

aeschtruth@gmail.com
Email Address

285 Bacon Street
Street Address

Suite or Apt

Natick
City

MA
State

01760
Postal Code

What district do you live in? *

☑ Precinct 5

Mobile: (508) 801-4235
Primary Phone

Business: (617) 552-1729
Alternate Phone

Center for Retirement Research at Boston College
Employer

Associate Director for External Relations
Job Title

Which Boards would you like to apply for?

Senior Property Tax Exemption Study: Submitted

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◉ Yes ○ No

Have you ever attended a Natick town meeting?

◉ Yes ○ No

Have you ever served on a board, committee, or commission in the Town of Natick?

◉ Yes ○ No

If yes, please list name(s) of board, committee or commissions, along with date(s) of service:

Board of the Council on Aging

Interests & Experiences

Why are you interested in serving on a board or commission? Are there any changes you would like to see to these boards, committees and/or commissions?

I have been involved in conducting and disseminating research on aging policy -- particularly income security -- throughout my professional career (25 years). As a town meeting member and a member of the Board of the Council on Aging, I have been learning more about the needs of Natick's aging population. These include the need for older homeowners to receive property tax relief to help bolster their retirement security and maintain the ability to continue to stay in their home.

Are you a graduate of the Natick Community Services Citizen's Leadership Academy?

(•) Yes ( ) No

Please list any skills or specialized knowledge you can bring to these boards, committees and/or commissions.

I have an extensive background in retirement income security issues. From 1991-98, I was an analyst with the U.S. Government Accountability Office in Washington, DC. In this role, I studied corporate eldercare programs and the financial viability of and potential reforms to Medicare and Social Security. While at GAO, I served as a temporary aide to the chairman of the U.S. Senate Finance Committee during debates over proposed changes to Medicare. From 1998-present, I have served as the Associate Director for External Relations with the Center for Retirement Research at Boston College. During this time, I have helped develop the organization from a small start-up to a nationally recognized leader in research on retirement income security. Our Center covers a variety of issues related to money and retirement, including Social Security, employer-sponsored retirement plans (public and private sector), labor force issues involving older workers, health costs facing retirees, and the potential of using home equity to help support retirement income needs (including property tax deferral programs operated by Natick and other cities and towns in Massachusetts). My specific duties involve writing and editing publications, handling press relations, overseeing our website and social media activities, assisting with the overall management of the organization, and maintaining relationships with funders.

Please list any professional affiliations.

Member, National Academy of Social Insurance

Let us know what other specialized interests or hobbies you might have.

Running, reading, hiking, travel.

aeschtruth_resume_rev_2019.pdf
Upload a Resume

ANDREW D. ESCHTRUTH
285 Bacon Street
Natick, MA 01760
(508) 801-4235
aeschtruth@gmail.com

PROFILE | Communications leader. Skilled writer, editor, and public speaker. Excel at managing relationships with media, researchers, and funders. Adept at executing communication strategies to create high visibility for academic research among both professional and lay audiences.

WORK EXPERIENCE

Center for Retirement Research at Boston College | 1999-present

Associate Director for External Relations

Lead communications for nationally-recognized economic research organization.

- Oversee team responsible for publications, media relations, websites, conferences, and social media.
- Edit bi-weekly series of issue briefs on economic and policy research.
- Manage corporate partnerships with financial services firms.
- Represent organization as spokesperson to a variety of audiences, including press, financial professionals and policy practitioners.
- Serve as liaison to program officials at government agencies and foundations.
- Co-author of consumer guides on personal finance and retirement.

U.S. General Accounting Office | 1991-1999

Senior Evaluator, Accounting and Information Management Division

Evaluator, Health, Education, and Human Services Division

Led project teams analyzing federal fiscal policy and Social Security financing.

- Co-authored congressional reports and testimony, including analysis of implications of investing Social Security Trust Fund revenues in equities.
- Received outstanding performance recognition.
- Served on special assignment as legislative assistant to Senator William V. Roth, Jr., chairman, U.S. Senate Finance Committee.

PROFESSIONAL ACTIVITIES

Member, National Academy of Social Insurance

SELECTED PUBLICATIONS

"Modernizing Social Security: Minimum Benefits" with Alicia H. Munnell. 2019. *Issue in Brief* 19-2. Chestnut Hill, MA: Center for Retirement Research at Boston College.

Falling Short: The Coming Retirement Crisis and What to Do About It with Charles Ellis and Alicia H. Munnell. 2014. New York, NY: Oxford University Press.

Why Target Date Funds? with Steven A. Sass and Alicia H. Munnell. 2011. Chestnut Hill, MA: Center for Retirement Research at Boston College.

The Social Security Claiming Guide with Steven A. Sass and Alicia H. Munnell. 2009. Chestnut Hill, MA: Center for Retirement Research at Boston College.

The Social Security Fix-It Book with Steven A. Sass and Alicia H. Munnell. 2009. Chestnut Hill, MA: Center for Retirement Research at Boston College.

"Employers Lukewarm About Retaining Older Workers" with Steven Sass and Jean-Pierre Aubry. 2007. *Work Opportunities Issue in Brief* 10. Chestnut Hill, MA: Center for Retirement Research at Boston College.

"Will Reverse Mortgages Rescue the Baby Boomers?" with Wei Sun and Anthony Webb. 2006. *Issue in Brief* 54. Chestnut Hill, MA: Center for Retirement Research at Boston College.

"National Saving and Social Security Reform" with Robert Triest. 2005. *Just the Facts on Retirement Issues* 18. Chestnut Hill, MA: Center for Retirement Research at Boston College.

"Are Older Workers Responding to the Bear Market?" with Jonathan Gemus. 2002. *Just the Facts on Retirement Issues* 5. Chestnut Hill, MA: Center for Retirement Research at Boston College.

"Budget Surpluses: Experiences of Other Nations and Implications for the United States." 1999. Washington, DC: U.S. General Accounting Office.

"Social Security Financing: Implications of Government Stock Investing for the Trust Fund, the Economy, and the Budget." 1998. Washington, DC: U.S. General Accounting Office.

"The Deficit and the Economy: An Update of Long-Term Simulations." 1995. Washington, DC: U.S. General Accounting Office.

EDUCATION

Duke University, M.P.P. in Public Policy, 1991

University of Michigan, B.A. in Political Science, 1989

ADDITIONAL EXPERIENCE

Member, Natick Town Meeting, 2015-present

Member, Board of Natick Council on Aging, 2017-present

Profile

Robert
First Name

E
Middle Initial

Caplin
Last Name

bobcaplin@gmail.com
Email Address

5 Crest Rd
Street Address

Suite or Apt

Natick
City

MA
State

01760
Postal Code

What district do you live in? *

☑ Precinct 5

Home: (508) 655-7686
Primary Phone

Home:
Alternate Phone

Retired
Employer

Job Title

Which Boards would you like to apply for?

Senior Property Tax Exemption Study: Submitted

Are you a registered voter in the Town of Natick?

◉ Yes ○ No

Have you ever attended a Natick town meeting?

◉ Yes ○ No

Have you ever served on a board, committee, or commission in the Town of Natick?

○ Yes ◉ No

If yes, please list name(s) of board, committee or commissions, along with date(s) of service:

Interests & Experiences

Why are you interested in serving on a board or commission? Are there any changes you would like to see to these boards, committees and/or commissions?

I have lived in Natick for 24 years and never served on a Town committee. I am now retired and feel that my strong analytical tax skills and experience would add value to the Senior Property Tax Exemption Study committee.

Are you a graduate of the Natick Community Services Citizen's Leadership Academy?

○ Yes ◉ No

Please list any skills or specialized knowledge you can bring to these boards, committees and/or commissions.

Through my 30 plus years of experience in large financial organizations, I have developed strong spreadsheet, database, and tax research and analysis skills which I have applied to create financial and tax applications. I have a BS in Accounting, MS in Taxation, and IT degrees and certifications. Although I am retired, I have retained my MA CPA license.

Please list any professional affiliations.

MA Certified Public Accountant

Let us know what other specialized interests or hobbies you might have.

I enjoy vegetable gardening (JJ Lane Community Gardens and home garden), bike riding, walking and attending local community events, especially concerts. I was Treasurer of TCAN in its storefront years and Treasurer of the Wellesley Tennis Association for about 20 years.

Bob_Caplin_Resume.doc

Upload a Resume

ROBERT E. CAPLIN, CPA

5 Crest Road, Natick, MA 01760 • (508) 655-7686 • bobcaplin@gmail.com

BUSINESS SYSTEMS ANALYST

Versatile CPA/ IT professional who offers extensive business experience, including a unique combination of tax / business systems and information technology expertise in diversified business environments. Effective communicator and team player adept at enhancing bottom line profitability by increasing tax reporting efficiency, as well as accuracy and planning tools for large, publicly traded corporations.

PROFESSIONAL EXPERIENCE

J.P. MORGAN WORLDWIDE SECURITIES SERVICES, Boston, MA 2006 - 2015

Assistant Vice President (Business/Systems Analyst), Information Technology (12/2007-2015)

Coordinate the design, development and review of client specific reports and data extracts for mutual fund, institutional accounting and mutual fund Tax department clients.

- Design client specific reports and data extracts from specifications in Business Requirement Documents.
- Write queries that extract data from Oracle accounting database and compare results to SUNGARD accounting system data.
- Prepare technical instructions for off shore Developers to create tables and stored procedures that store report data.
- Create Namespaces in IBM Cognos Business Intelligence that map table columns to Cognos Framework Manager.
- Prepare report design instructions for Developers to create client specific Fund Accounting and Institutional Accounting reports using Namespaces and Cognos Report Writer.

Assistant Treasurer, Mutual Fund Tax Department (6/2006 – 12/2007)

Provided technology support for Department that prepared 400 regulated investment company fiscal and excise tax provisions, federal and state tax filings and year-end shareholder information.

STATE STREET CORPORATION, Boston, MA 1996 - 2006

Assistant Vice President, Corporate Tax Department

Managed sales/use tax planning, compliance and audit functions.

- Developed policies, procedures and strategies to minimize use tax with Strategic Sourcing, Accounts Payable and business areas. Initiated a reverse sales tax audit.
- Developed procedures to efficiently collect use tax data and prepare tax returns with Accounts Payable Department. Reviewed monthly use tax returns.
- Researched taxability of sales and use tax transactions (primarily for technology related purchases) and discussed with internal counsel.
- Managed all aspects of sales tax audit, including responding to information requests and analyzing and summarizing work papers.
- Prepared state use tax registration forms, abatements and amnesty filings.
- Managed Internal Revenue Service Federal tax audit and state and city income tax audits.
- Met with auditors, responded to information requests, and analyzed and summarized audit work papers to determine technical accuracy.
- Prepared state apportionment work papers for State Street Bank for filing in forty states.
- Developed applications to improve efficiency and accuracy of Corporate Tax Department.
- Led team to reengineer the quarterly close, federal tax compliance and forecast processes. Designed Access database that accepts trial balance download and automatically populates general ledger driven tax adjustments for each legal entity.

- Developed Federal taxable income calculation model using Excel and Visual Basic for Applications.
- Designed Access databases to track IRS audit information document requests and proposed adjustments, tax payments and refunds, state apportionment factors, partnership information and partnership K-1s and functional currency translation adjustments.
- Led team to implement tax compliance software application from 1997 to 2005 using Insource and AACTS tax software applications. Implemented Form M-3 for 2004 and 2005.

ERNST & YOUNG LLP, Boston, MA 1993 - 1996

Senior Tax Associate

- Applied technology to streamline corporate and partnership tax compliance process.
- Developed the Partner Bridge process that enabled users to prepare partner K-1s directly from Excel bypassing the tax software application.
- Trained and provided technical support to tax professionals in the use of CLR/Fasttax products, including the Corporate, Partnership and Partner Bridges and partnership compliance software.
- Prepared and reviewed large consolidated, federal and multi-state corporate tax returns and partnership, regulated investment company and individual tax returns.

S. ROTHMAN AND CO., P.C., Boston, MA 1989-1991 & 1984-1986

Senior Accountant

- Performed compilation, review and audit engagements of closely held business entities.
- Prepared and reviewed tax returns of individuals, corporations, partnerships and trusts.
- Corresponded with IRS and state revenue departments on behalf of clients.
- Trained and supervised staff accountants.

TOBIN AND WALDSTEIN, CPAS**,** Newton, MA 1986-1989

Staff Accountant

- Performed audit engagements for real estate limited partnerships.
- Prepared tax returns and financial statements for corporations and partnerships.

TECHNOLOGY TRAINING / CERTIFICATIONS

Applications Developer, JP Morgan Technology University, July 2014
Business Analyst, JP Morgan Technology University, July 2013
Microsoft Certified Professional (MCP), Designing and Implementing Databases with Microsoft SQL Server, 2000 Enterprise Edition
Client/Server Application Development Certification, Boston University Corporate Education Center, June 2000
Microsoft Office Specialist Certification, Excel 2000 Expert
Microsoft Office Specialist Certification, Access 2000 Core

EDUCATION/MILITARY EXPERIENCE

MS, Taxation, Bentley University, Waltham, MA
BS, Accounting (cum laude), University of MA, Lowell, MA
Veteran, Massachusetts Army National Guard

Town of Natick

SENIOR PROPERTY TAX EXEMPTION STUDY

BOARD DETAILS

OVERVIEW

SIZE 6 Seats

TERM LENGTH

TERM LIMIT

Seeking Applicants now....

The Senior Property Tax Exemption Study Committee will research and analyze the feasibility of the Town of Natick pursuing the adoption of a Senior Property Tax Exemption to lower the property tax of seniors who meet certain income, residency, and eligibility criteria for an annual property tax that is capped at a percentage of their annual income, or other senior property tax relief initiatives.

Committee will be made up of Natick's Director of Assessing, Director of Council on Aging, Board of Selectmen Member and three citizens-at-large.

DETAILS

ENACTING RESOLUTION

ENACTING RESOLUTION WEBSITE

Town of Natick

SENIOR PROPERTY TAX EXEMPTION STUDY

BOARD ROSTER

VACANCY

VACANCY

VACANCY

VACANCY

VACANCY

VACANCY