



Compensation & Benefits Advisory Services, LLC



Deborah Walker, CPA

Senior Advisor, Compensation & Benefits
Compensation & Benefits Advisory Services, LLC

Deborah (“Deb”) Walker is the Senior Advisor, Compensation & Benefits at Compensation & Benefits Advisory Services LLC (“CBAS”). Deb has over 35 years of experience consulting for employers and executives on a broad range of compensation and benefits issues such as: executive compensation; qualified and non-qualified retirement plans; employment taxes; health and welfare benefits; and fringe benefits.

She is the National Director, Compensation & Benefits at Cherry Bekaert LLP and has served as the partner-in-charge of the Washington National Tax Practices at Deloitte Tax LPP and KPMG as well as the Deputy to the Benefits Tax Counsel – Office of Tax Policy at the U.S. Treasury Department. In addition to her work advising clients, Deborah teaches as an adjunct professor at the Kogod School of Business at American University and edits for Bloomberg Tax, focusing on the Compensation Planning Tax Management Portfolios, a part of the Bloomberg BNA’s Tax and Accounting Center.

EXPERIENCE

2017-present **KOGOD SCHOOL OF BUSINESS, AMERICAN UNIVERSITY, Washington, DC**
Adjunct Professor, Compensation and Benefits Overview Course

2017-present **CARVER|EDISON, New York, New York**
Tax Advisor

2014- present **BLOOMBERG TAX, Arlington, VA**
Independent Contractor editing the Compensation Planning Tax Management Portfolios

2013- present **CHERRY BEKAERT LLP, Washington, DC**
National Director, Compensation & Benefits

- Responsible for assisting firm professionals and clients with technical tax and ERISA areas including executive compensation, qualified retirement plans, health and welfare plans, employment taxes, accountable plans and fringe benefits.
- Developed and implemented training of Cherry Bekaert LLP professional staff and partners in domestic and international compensation and benefits income, employment and excise tax matters.
- Testified before the US House of Representatives Committee on Small Business regarding the controlled group rules for determining the employer for purposes of applying various provisions of the Affordable Care Act.

2002-2013

DELOITTE TAX LLP, Washington, DC

Partner In Charge – Global Employer Services Practice, Washington National Tax Practice

- Negotiated on behalf of clients (e.g., publicly traded construction company, publicly held specialty retailer) with the IRS National Office and various IRS field offices regarding compensation and benefits, excise and employment tax controversies
- Filed on behalf of clients (e.g., Fortune 50 retailer, various publicly traded technology companies) numerous private letter ruling requests, voluntary compliance disclosures, IRS examination protests and applications for tax exempt status determinations
- Advised numerous clients (e.g., private equity firms and their portfolio companies, large hospitality industry client) regarding compensation and benefits and employment tax issues
- Responsible for Deloitte Tax LLP technical quality assurance for domestic and international compensation and benefits and employment tax issues
- Developed and implemented training of Deloitte Tax LLP professional staff and partners in domestic and international compensation and benefits and employment tax matters
- Determined level of tax authority for tax positions related to compensation and benefits and employment tax issues for client tax filings and financial statements
- Authored numerous technical articles and spoke at many national conferences regarding compensation and benefits and employment tax issues

1998-2002

US TREASURY DEPARTMENT, Washington, DC

Deputy to the Benefits Tax Counsel – Office of Tax Policy

- Working with the Benefits Tax Counsel, shared responsibility for rendering advice to the Assistant Secretary (Tax Policy) and other Treasury policy makers with regard to all tax-related aspects of employee benefits and employment taxes, including regulations and legislation.
- Worked closely with the Benefits Tax Counsel, the Assistant Secretary (Tax Policy) and Deputy Assistant Secretaries (Tax Policy) in planning, developing and implementing the Treasury Department's benefits tax policy program and objectives, with respect to all aspects of compensation and benefits, including executive compensation; health care; tax-qualified pension, profit-sharing and stock bonus plans, including 401(k) plans and ESOPs; statutory fringe benefits; tax-sheltered annuities; and employment taxes.
- Outstanding Service Award, for work on the FY 2001 Budget, named by the Secretary of Treasury (2000)
- IRS Commissioner's Award, for work on required minimum distribution regulation (2001)

1976-1998

KPMG, Washington, DC

Partner- In- Charge – Compensation & Benefits Practice – MidAtlantic Area Associate National Director of Tax Services for Employee Benefits Consulting Partner, Washington National Tax Practice

Professional Staff in Raleigh, NC and the Washington National Tax Practice

- Advisor to firm professionals and clients on compensation and benefits and employment tax issues, personal financial planning, estate and gift tax issues, and tax matters related to tax-exempt organizations.
- Worked closely with government officials commenting on new and proposed guidance affecting taxpayers
- Assisted clients in communicating with Capitol Hill, the Treasury Department and the IRS
- As leader of the MidAtlantic Area Practice responsible for all actuarial, executive compensation, group benefits, tax and regulatory, and defined contribution record keeping professionals, in 5 years grew the practice to \$6.5M in revenues with 27 professionals
- Admitted to the partnership after 9 years as an employee

PROFESSIONAL AWARDS & MEMBERSHIPS

- Winner AICPA Arthur J. Dixon Award for Outstanding Service to the Profession 2017
- Member, Board of Directors, Martha's Vineyard Community Services 2013 - Present
- NACD Governance Fellow, National Association of Corporate Directors 2013 – 2014
- Member, Co-Chair, Chair, IRS Commissioner's Advisory Committee 2009 – 2013
- Member, AICPA Board of Directors Life Insurance and Long Term Disability Committee 2009 – 2012
- Member, Chair, AICPA Annual Employee Benefits Conference 1989 - 1994, 2002 – Present
- Member, Deloitte's Global Employer Services Leadership Team 2002 - 2013
- Member, Deloitte's Washington National Tax Practice Management Group 2002 - 2013
- President, Board of Directors, The Colombia Residences 2008 - 2014
- Member, AICPA 1977 - Present
- Member, Tax Advisor Editorial Board 2004 – 2008
- Member, AICPA Legislative and Regulatory Committee 2004 – 2008
- Editor-in-Chief, Journal of Taxation of Employee Benefits 1992 - 1998
- Member, KPMG Compensation and Benefits Operating Committee 1992 - 1998
- Member, KPMG Mid-Atlantic Practice Leadership Committee 1993 - 1998
- Member, Chair, AICPA Federal Taxation Executive Committee 1989 - 1997
- Council Member-At-Large, American Institute of Certified Public Accountants (AICPA) 1995 - 1996
- Member, Little Brown Advisory Board 1994 - 1995
- World's Top 100 Accountants, named by Accounting News Today 1994 - 1994
- Member, CCH Tax Transactions Library Advisory Board 1991 - 1994
- Treasurer, Washington, D.C. Chapter, WEB: A Network of Professional Working in Benefits 1990 - 1992
- Member, National Treasurer, WEB: A Network of Professionals Working in Benefits 1986 - 1992
- Chairman, AICPA Task Force on Section 89, Discrimination Rules for Welfare Benefits Plans 1988 - 1989
- Member, North Carolina Association of Certified Public Accountants 1977 - 1985
- Authored and co-authored numerous articles and spoke at numerous technical conferences on various compensation and employee benefits issues. Specifics provided upon request.


EDUCATION

UNIVERSITY OF NORTH CAROLINA, Chapel Hill, NC

Master of Business Administration, 1976. Beta Gamma Sigma Honor Society. North Carolina Business Foundation MBA Scholar.

ALFRED UNIVERSITY, Alfred, NY

Bachelor of Arts, Economics, 1972. Phi Kappa Phi Honor Society. Magna Cum Laude. Economics Award (1972).



Deb can be reached at (202) 257-5609 or dwalker@cbas-llc.com.