

Meet our Team

Ernst & Young LLP
Information Reporting
and Withholding team



Fun fact

Racquet sports are Tara's passion. She recently won the New Jersey state paddle tennis tournament.

Tara Ferris

Principal

tara.ferris@ey.com

Tara is a Tax principal and leads the Information Reporting and Withholding practice.

Tara advises on various matters involving US information reporting and withholding, including IRS controversy matters, qualified intermediary and withholding foreign partnership compliance reviews, as well as advises on Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS) tax technical requirements. Tara oversees the US firm's Customer Tax Operations practice that performs documentation validation, withholding calculations and reporting as a managed service for financial institutions.

Prior to joining Ernst & Young LLP, Tara served as Senior Counsel with the Office of Associate Chief Counsel (International) at the IRS. In this position, Tara worked with exam teams to develop strategies for auditing matters relating to nonresident alien withholding and reporting, FATCA and international aspects of domestic information reporting. Tara is the principal draftsperson of the FATCA regulations, Chapter 3 and 61 coordinating regulations, the withholding aspects of the regulations under Section 871(m), and the 2017 QI and WP Agreements. Tara is a licensed attorney in the state of California.



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Fun fact

David loves coaching his kids and has a few Super Bowl titles in flag football to show for it.

David Jensen

Principal

david.jensen@ey.com

David is a principal in the Financial Services Organization of Ernst & Young LLP. David has more than 15 years of experience in US information reporting and withholding matters, including FATCA, as well as on matters involving the CRS. David leads the EY Tax Form Validation (TFV) Services business, supporting a large array of clients using leading-class technology and processes that he designed. Most recently, David developed the Electronic Tax Form Validator (eTFV), an innovative and leading-class solution.

Prior to joining the firm, David was a senior vice president in Citigroup's Corporate Tax Department, where he was responsible for rendering tax advice to Citigroup's institutional businesses and clients on US information reporting and withholding matters. David received a JD from the Maurice A. Deane School of Law at Hofstra University and a BBA from Hofstra University. He is admitted to the bar in New York.



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Fun fact

Andrea is a mother of twins and the adoptive mother of two dogs!

Andrea Garcia Castelao

Principal

andrea.garcia.castelao@ey.com

Andrea is a Tax principal in the firm's Financial Services Organization Tax practice. Andrea has over 17 years of experience providing tax advisory services to financial institutions, and currently serves in the Customer Tax Operations and Reporting Services (CTORS) group, where she focuses on US information reporting and withholding matters, including FATCA and CRS.

Andrea has worked internationally in leadership roles and assisted large clients across a range of industries with significant operations globally, combining her tax technical skills in the customer tax regimes with effective teaming across functions to improve technology and operational processes in this area. At our firm, Andrea focuses on developing solutions for the Wealth & Asset Management (WAM) and Private Equity (PE) industry, where she leads the CTORs service offerings for this industry.



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Fun fact

Jonathan loves to travel and is learning Spanish in his spare time.

Jonathan Jackel
Managing Director
jonathan.jackel@ey.com

Jonathan is a managing director in the Financial Services Organization. His practice includes a full range of information reporting and withholding issues, both under US law and the CRS. He has provided extensive advice to qualified intermediaries to obtain and keep QI status, including periodic reviews and other reviews of clients' systems, policies and procedures. He also has advised on information reporting issues related to cryptocurrency and cost-basis reporting, including such topics as staking, debt instruments, options, wash sales, short sales and securities lending. Jonathan also advises on issues related to Sections 1446, 871(m) and 305(c); withholding foreign partnerships and trusts; other issues relating to information reporting (Forms 1099, 1042-S, 8805, and 8288-A); and Foreign Bank Account Reporting (FBAR).

Jonathan joined the firm in September 2015 after spending almost 19 years at Burt, Staples & Maner in Washington, DC. He served as a trial attorney with the Tax Division of the U.S. Department of Justice from 1992 to 1996 and was a clerk for the Honorable Renato Beghe of the U.S. Tax Court prior to that.



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Fun fact

Saul has a golden retriever named Rohe who recently turned one year old.

Saul Tilmann
Managing Director
saul.tilmann@ey.com

Saul has been with Ernst & Young LLP for over 15 years and is focused on Chapter 61 (i.e., Form 1099), Chapter 3 (i.e., Form 1042), Chapter 4 (i.e., FATCA), the CRS and FBAR reporting. Saul works extensively in the traditional Forms 1099 and 1042 space. Specifically, Saul has experience assisting withholding agents in process improvement to minimize exposure and ensure compliance in all areas of Chapter 61 and Chapter 3. Saul is embedded with Forms 1042 and 1042-S and 1099 for compliance for domestic withholding agents, with substantial experience with both financial and nonfinancial filing requirements. He has also assisted with numerous IRS audits, remediated past filings and assisted with voluntary disclosures of past years.

As part of the Chapter 4 (i.e., FATCA) and CRS reporting and withholding regimes, Saul has been deeply involved with the application of the rules to both financial and nonfinancial organizations. He works with withholding agents around the globe to complete implementation solution sets and leads numerous FATCA and CRS compliance projects annually. Saul is an active member of the Michigan Bar Association.



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Fun fact

Ryan grew up sailing and racing, and recently has been enjoying sailing in Cape Cod Bay during the summer.

Ryan Blewitt
Managing Director
ryan.blewitt@ey.com

Ryan is a managing director in the Financial Services Organization Tax practice at Ernst & Young LLP. He is based in the New York City area and has 16 years of professional experience. Ryan started with the firm in January 2016 and focuses on banking and capital markets (BCM) clients.

Prior to joining the firm, Ryan worked in the corporate tax group of a large institutional bank. He has extensive experience in US tax withholding and information reporting. He has worked with tax operations and corporate tax teams providing tax technical guidance, analysis and implementation support. Ryan holds a JD and an LLM in Taxation and is admitted to the bars of the state of New Jersey and the commonwealth of Pennsylvania.



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Fun fact

Colin is an avid waterman and prefers to be in the ocean rather than on land.

Colin Brien

Managing Director
colin.brien@ey.com

Colin is a managing director in the Financial Services Organization of Ernst & Young LLP. He has over 18 years of operational and managerial experience in US information reporting and withholding matters. This includes domestic withholding and reporting (i.e., Form 1099 reporting and 24% backup withholding), nonresident alien reporting and withholding (i.e., Form 1042-S reporting and 30% nonresident alien withholding), FATCA and the CRS.

Colin advises multinational organizations on effective and efficient practices in the area of information reporting and withholding. He currently focuses on assisting clients in advancing and simplifying their information reporting and withholding practices through the use of technology and practical processes. Colin assists multinationals across all industries with a particular focus in the areas of life sciences, media and entertainment, and technology.



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Fun fact

I've played over 750 games of Wordle with a 99% winning percentage and enjoy discussing my Wordle strategy with anyone who will listen.

Seth Poloner
Managing Director
seth.poloner@ey.com

Seth Poloner is a managing director in the Financial Services Organization at Ernst & Young LLP. His practice includes a full range of information reporting and withholding issues.

Prior to joining the firm, he was an executive director and the Global Head of the Operational Tax Advisory Group at a large institutional bank. He has extensive experience in all aspects of US information reporting and withholding, including nonresident alien and backup withholding; Forms 1042-S and 1099 reporting, including cost basis; Forms W-9 and W-8; and the Foreign Account Tax Compliance Act, qualified intermediary and qualified derivatives dealer regimes. He also provided tax advisory support, including advising with respect to new products and transactions; addressed client inquiries; and drafted tax-related policies and communications.

Seth was a member of the Internal Revenue Service Advisory Council and Chair of the SIFMA Tax Compliance Committee. He received an LLM in Taxation, a JD from New York University School of Law and a BS from the Yeshiva University Sy Syms School of Business.



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