



## **CERCA Fall Conference Program (11/10/18)**

### **Morning Program**

#### **Welcome & Introductions**

Tim Hugo, CERCA Executive Director  
Kathy Pickering, CERCA Chair & Vice President, Reg. Affairs & Executive Director,  
The Tax Institute for H&R Block

#### **The Identity Theft ISAC: Where it is Today and the Future**

Moderator: Courtney M. Kay-Decker, Director of the Iowa Department of Revenue  
Panel – Denise Davis, IRS ISAC Executive Official  
Scott Lockwood, Fraud Program Manager, Iowa Department of Revenue  
Jami Gibson, Vice President, Internal Operations-Drake Software  
Satyan Penmetsa, Chief Tax Officer, Wolters Kluwer

#### **GAO Reports on Preparation for the 2019 Filing Season & Enforcement Improvements**

Margaret Adams-Senior Analyst, GAO  
Erin Saunders-Rath-Senior Analyst, GAO

#### **Paymageddon 2020: Payroll Industry Forecast**

Moderator: Pete Isberg, Vice President, ADP  
Jenine A. Hallings, Risk Management Compliance Manager, Paychex  
Tony Tullo, Intuit

#### **The Dust Has Settled – What the November 2018 Elections Mean for the Tax Industry**

Moderator: Steve Ryan, McDermott Will & Emery  
Former Senator Tim Hutchinson, Senior Director, GreenbergTraurig  
Former Congressman Tom Davis, Director of Federal Government Affairs, Deloitte  
Russ Sullivan, Brownstein Hyatt Farber Schreck

#### **The 2018 ETAAC Report**

Mark Steber, Chief Tax Officer, Jackson Hewitt  
Kathy Pickering, Vice President, Regulatory Affairs & Exec. Director,  
The Tax Institute for H&R Block



## **Afternoon Program**

**Keynote Address by The Honorable Charles P. Rettig, IRS Commissioner**

**Ken Corbin, IRS Commissioner, Wage & Investment**

### **Tax Reform & the Upcoming Tax Season**

CERCA TRIWG Report by the TRIWG Co-Chairs

Angela Camp, Senior Manager, Federal Agency Relations, Intuit

Andy Phillips, Director – Tax Institute, H&R Block

Coming Attractions: A Preview of Security Summit & Filing Season Communications

Terry Lemons, Chief, Communications & Liaison, IRS

Mel Hardy, Director, National Public Liaison, IRS

Karin Rice, Acting Director for Communications, Wage & Investment

Bernie McKay, Senior Vice President & Chief Public Policy Officer, Intuit

### **Ready or Not, Here It Comes: The 2019 Tax Season**

A Roundtable Discussion by the CERCA Board

Moderator: Shannon Bond, Sr. Director of Government Relations, Wolters Kluwer

Michele Geraci, Vice President, Tax Development, Jackson Hewitt

Rob Gettemy, Chief Operating Officer, TaxAct

Joe Sica, Chief Public Policy Officer, GreenDot/TPG

Timur Taluy, Chief Executive Officer, FileYourTaxes.com

**Please Join Us for a Post-Conference Reception at 5:00 pm in the Monroe Room  
(located on same floor)**