

November 14, 2018

**HILTON CRYSTAL CITY
ARLINGTON, VIRGINIA**



FALL MEETING PROGRAM

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Council for
Electronic
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PROGRAM

7:45-8:30 AM

Continental Breakfast

Sponsored by Jackson Hewitt

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TAX SERVICE

8:30-8:50 AM

Welcome & Introductions

Tim Hugo, CERCA Executive Director

Kathy Pickering, CERCA Chair & Vice President, Regulatory Affairs & Executive Director, The Tax Institute for H&R Block

8:50-9:35 AM

“The Identity Theft ISAC: Where it is Today and the Future”

Moderator: **Courtney Kay-Decker**, Director, 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 Technology Officer, Wolters Kluwer

9:35-10:05 AM

GAO Reports on Preparation for the 2019 Filing Season and Enforcement Improvements

Margaret Adams, Senior Analyst, GAO

Erin Saunders Rath, Senior Analyst, GAO

10:05-10:25 AM

Morning Break

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10:25-10:55 AM

“Paymageddon 2020: Payroll Industry Forecast”

Moderator: **Pete Isberg**, Vice President, ADP

Panel: **Jenine A. Hallings**, Risk Management Compliance Manager, Paychex

Tony Tullo, Intuit

10:55-11:40 AM

“The Dust Has Settled – What the November 2018 Elections Mean for the Tax Industry”

Moderator: **Steve Ryan**, Partner, McDermott Will & Emery

Panel: **Former Senator Tim Hutchinson**, Senior Director, GreenbergTraurig

Former Congressman Tom Davis, Director of Federal Government Affairs, Deloitte

Russ Sullivan, Brownstein Hyatt Farber Schreck

PROGRAM

11:40 AM -
12:00 PM

The 2018 ETAAC Report

Kathy Pickering, Vice President, Reg. Affairs & Exec. Director, The Tax Institute for H&R Block

Mark Steber, Chief Tax Officer, Jackson Hewitt

12:00-1:30 PM

Lunch

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DrakeSoftware[®]
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1:30-1:55 PM

Keynote Address: The Hon. Charles P. Rettig, IRS Commissioner

1:55-2:35 PM

Ken Corbin, IRS Commissioner, Wage & Investment

2:35-2:50 PM

Afternoon Break

Sponsored by Liberty Tax



2:50-3:30 PM

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 Communication & Liaison, Wage & Investment, IRS

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

3:30-4:00 PM

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

A Roundtable Discussion by the CERCA Board

Moderator: **Shannon Bond**, Senior Director of Government Relations, Wolters Kluwer

Panel: **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 Relish Restaurant located on same floor*



The Honorable Charles P. Rettig **Keynote Speaker**

Charles P. Rettig is the 49th Commissioner of the IRS. As Commissioner, Mr. Rettig presides over the nation's tax system, which collects approximately \$3.4 trillion in tax revenue each year. This revenue funds most government operations and public services. Mr. Rettig manages an agency of about 80,000 employees and a budget of approximately \$11 billion.

In leading the IRS, Mr. Rettig is focused on improving service to the nation's taxpayers, balancing appropriate enforcement of the nation's tax laws while respecting taxpayer rights.

Previously, Mr. Rettig was with the law firm of Hochman, Salkin, Rettig, Toscher & Perez, P.C., for more than 36 years. In his practice, Mr. Rettig represented thousands of individuals, businesses and corporate taxpayers before the IRS, the Department of Justice Tax Division, federal and state courts and state taxing authorities. These cases involved civil examinations and appeals, criminal investigations and tax collection matters.

Mr. Rettig has held leadership roles in a number of professional organizations, most recently serving as Vice Chair-Administration, for the American Bar Association's Section of Taxation, and President of the American College of Tax Counsel. He was a member of the IRS Advisory Council (IRSAC) for three years beginning in 2008, and served as IRSAC's chair from 2010 to 2011. He also served as Chair of the Taxation Section of the State Bar of California and has served on the advisory boards of both the Franchise Tax Board and the Board of Equalization in his home state of California.

Mr. Rettig has received numerous professional honors during his career from organizations across the country. He has been a featured speaker and panelist at hundreds of tax conferences throughout the U.S., Europe and Central America. And he has authored numerous tax-related articles.

He received a B.A. in Economics from the University of California at Los Angeles, as well as a J.D. with honors from Pepperdine University and an LL.M. in taxation from New York University.

Mr. Rettig, who is married to Tam Rettig, is also active in numerous civic and philanthropic activities. He's the founder of the UCLA Extension VETS COUNT Scholarship Fund and active in the Wounded Warrior Project, Advance Guard.

CERCA FALL 2018 Attendee List

COMPANY	NAME	TITLE (if provided)
Accenture Federal Services	Jim Gaul	
	Mohammad Khattak	
	Ken Nesbit	
	Adam Siegel	
ADP	Pete Isberg	VP Government Relations
Bloomberg Tax Technology	Bob Bennett	Product Manager
Booz Allen Hamilton	Rick Byrd	Executive Consultant
	Marc Weber	Principal
Brownstein Hyatt Farber Schreck	Russ Sullivan	
Canopy Tax	Alan Larsen	Government Relations
	Chandler Love	Product Manager
CERCA	Tim Hugo	Executive Director
	Vickie Hull	Deputy Executive Director
	Katy McCain	Staff
	Pam McCain	Staff
CGI Federal	Li Hawkins	Senior Business Analyst
	Sarah Meadows	Director, Consulting
CPS Consulting	Cedric Swain	
Credit Karma Tax	Julie Magee	Director, Tax Regulatory Affairs
	Christina Taylor	Senior Operations Manager
Crosslink Professional Tax Solutions	Mark Castro	Government/Industry Liaison
	Brett Klutch	SVP of Sales and Marketing
	Rebecca McCaulley	Tax Analyst
Deloitte	Paula Davis	
	Kathryn Karlman	Managing Director
	Brendan Mahon	Managing Director
	Mark Price	Principal
Drake Software	Jared Ballew	Government Liaison
	Jami Gibson	VP, Internal Operations
	Robin Miles	Federal Tax Products Manager
	Jamie Stiles	President

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COMPANY	NAME	TITLE (if provided)
Equifax	Rob Edwards	Account Executive
Experian	Timothy Starkey	Director, Strategic Accounts
ezTaxReturn.com, LLC	Ronald Leder	Managing Member
Federation of Tax Administrators	Verenda Smith	Deputy Director
FileYourTaxes.com	Timur Taluy	Chief Executive Officer
Former Congressman	The Honorable Tom Davis (R-VA)	
Former Senator	The Honorable Tim Hutchinson (R-AR)	
GAO	Margaret Adams	Senior Analyst
	Tara Carter	Assistant Director
	Shannon Finnegan	Assistant Director
	Tom Gilbert	Assistant Director
	Rianna Jansen	Analyst
	Jessica Lucas-Judy	Director
	Shelbe Klebs	Analyst
	Regina Morrison	Analyst
	Michael O'Neill	Senior Analyst
	Daniel Paulk	Analyst
	Neil Pinney	Assistant Director, Tax Policy and Administration
	Erin Saunders Rath	Senior Analyst
	Miranda Wickham	Analyst
Sarah Wilson	Policy Analyst	
Green Dot/TPG	Chris Bagg	Senior Manager, Key Client & Product
	Brad Cowie	President & Chief Operating Officer
	Joe Sica	Chief Public Policy Officer
	Eric Inkrott	VP, Tax Risk Officer
H&R Block	Ben Deneka	Program Manager
	Erin Donar	Director, Gov't Relations
	Andy Phillips	Director - Tax Research
	Kathy Pickering	VP Regulatory Affairs The Tax Institute
	Mike Slack	Lead - Tax Research
	Dan Turrentine	Chief Government Relations Officer
	Susan Waldron	Director-Marketing

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COMPANY	NAME	TITLE (if provided)
Happy Tax, CryptoTaxPrep, CryptoTaxAcademy	Mario Costanz	CEO
	Knox Wimberly	Tax Director
HumanTouch LLC	Rick Hill	Senior Vice President
Intuit	Peggy Bogadi	Consultant
	Angela Camp	Manager, Corp. Affairs, Government Relations
	Daniel Eubanks	Senior Manager, Tax Regulatory Affairs & Policy
	Lauren Hagwood	Senior Manager, State Tax Regulatory Affairs
	Krista Holub	Program Manager
	Joe Lillie	Director, Tax Office
	Bernie McKay	Senior Vice President & Chief Policy Officer
	Tony Tullo	Consultant
Iowa Department of Revenue	David Williams	Chief Tax Officer
	Scott Lockwood	Program Manager
IRS	Courtney Kay-Decker	Director
	Roxanne Barkley	Senior Program Analyst
	Melissa Beck	Senior Program Analyst
	Jackie Benjamin	Senior Program Analyst
	Ken Corbin	Commissioner, Wage & Investment
	Denise Davis	IRS ISAC Executive Official
	Janice Foulk	National Account Manager
	Diane L. Fox	Industry Engagement and Strategy
	Mel Hardy	Director, National Public Liaison
	Kevin Hatton	Program Manager
	Rich Ledger	Senior Technical Advisor
	Terry Lemons	Chief, Communications & Liaison
	Peter Maser	Senior National Account Manager
	Wayne Mercado	Senior National Account Manager
	Scott Mezistrano	Senior National Account Manager
	Keith Morris	Program Analyst
	Charles P. Rettig	Commissioner
Karin Rice	Acting Director for Communications, Wage & Investment	
	Management & Program Analyst	
Teresa Sexton	Executive Officer	
Juanita A. Wueller	Analyst	
IRS, Taxpayer Advocate Service	Howard Zach	
	Laura Baek	Acting Director of TAS Research
	Daniel Causey	Attorney Advisor
Ken Drexler	Senior Advisor to National Taxpayer Advocate	

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COMPANY	NAME	TITLE (if provided)
Jackson Hewitt Tax Services	Michele Geraci	VP, Tax Products
	Mark Steber	Chief Tax Officer
	Gary Weinstein	SVP, Deputy General Counsel & Chief Privacy Officer
	Jo Willetts	Director, Tax Resources
Latino Tax Professionals	Carlos C. Lopez, EA	Executive Director
	Antonio Martinez, EA	V.P. Business Development
Leidos	Karen Bell	Portfolio Manager
	Ken Folger	Division Manager
	Jim Weaver	Senior Program Manager
LexisNexis Risk Solutions	Chris Mauldin	Account Executive
Liberty Tax Service	Richard Ernst	Compliance Counsel
	Steve Peters	CIO
MAXIMUS Federal	Bill Gagne	Senior Analyst
	Verlinda Paul	Consultant
	Larry Reagan	Vice President
	Jackie Smith	IT Strategies
	Reggie Turner	Manager
McDermott Will & Emery	David Ransom	Partner
	Steve Ryan	Partner
Media	Bill Hoffman	Senior Reporter - Tax Notes Today
MetaBank	Clark Gill	President
	John Hagy	SVP and Head of Government and Industry Relations
	Jermaine Shearin	VP Sales
MITRE Corporation	Andrew Dziejewski	Director ISAC/TTP
	Melissa Hardin	
MRS Tax Enterprises INC	Thorman Jerry, Jr.	President
Northrop Grumman	Linda Hipskind	Manager Programs
	Pete Stipek	Subject Matter Expert
On-Line Taxes, Inc.	Trisha Hale	Vice President of Operations

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COMPANY	NAME	TITLE (if provided)
Optima Tax Relief	David King	CEO
Paychex, Inc.	Jenine Hallings	Risk Management Compliance Manager
PWC	Nghiep Nguyen	Director
Refundo	Roger Chinchilla	CEO
Republic Bank	Carter Dempsey	VP - Director of TRS Sales
River City Bank	Krystal Cornett	Vice President River City Bank Tax Division
Sovos	Jeremy Olson	Strategy Manager
Tax Protection Plus	Matt Lievens	CEO
TaxAct	Robert Gettemy Andrew Oswald, CPA	COO Tax Analyst
TaxHawk, Inc.	Rick Graham Calvin Whitehead	COO Director of Product Development
Taxslayer	Seth Babb	Director of Consumer Product Mgmt in Product Mgmt
Thomson Reuters	Geno Salo	Senior Director
TransUnion	Paul Chesen Stuart Levy	Senior Director Senior Director
Wolters Kluwer	Shannon Bond Stephanie Plaza Satyan Penmetsa	Senior Director, Government Relations Segment Product Manager Chief Technology Officer

**Mark your calendars now for the CERCA
Spring 2019 Conference
May 22, 2019**

Renaissance Arlington Hotel in Crystal City

NOTES

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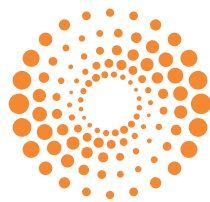
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