



CERCA Spring 2019 Conference Program (as of 5/17/19)

Morning Program

7:45-8:30 Continental Breakfast Sponsored by Jackson Hewitt

8:30-8:50 Welcome & Introductions

Tim Hugo, CERCA Executive Director

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

8:50-9:25 “Phew, the Tax Season is Over” A Review of this past Tax Season by the CERCA Board

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

Panel: John Sapp, Vice President, Strategic Development, Drake
Pete Isberg, Vice President, ADP
Bill Nelson, President, Republic Processing Group, Republic Bank

9:25-9:50 States’ Letters of Intent – Industry Perspectives

Moderator: Timur Taluy, President, FileYourTaxes.com

Panel: Mark Castro, Government/Industry Liaison, CrossLink Tax Professional Services
Mimi Nolan, Director-Regulatory Affairs, The Tax Institute at H&R Block

9:50-10:00 CERCA Announcements – Tim Hugo, Executive Director

**10:00-10:30 Keynote Address: The Honorable Charles P. Rettig
Commissioner of the Internal Revenue Service**

10:30-10:50 Morning Break Sponsored by Leidos

10:50-11:30 Overcoming Language & Cultural Barriers in the Tax Preparation Industry

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

Panel: Seth Babb, Director of Consumer Product Management, TaxSlayer
Michele Geraci, Vice President-Tax Products, Jackson Hewitt
Carlos Lopez, Executive Director, Latino Tax Professionals



11:30-12:15 A View from the Hill – Latest Happenings in Congress

Moderator: Russ Sullivan, Brownstein Hyatt Farber Schreck

The Honorable Phil Bond, President & CEO, Bond & Associates

Steve Ryan, Partner, McDermott Will & Emery

12:15-1:30 Lunch Sponsored by Drake

1:30 – 2:00 Keynote Speaker

David Alito, IRS Deputy Commissioner, Wage & Investment

2:00-2:40 “Understanding Today’s Cyber Attack Trends”

Jeff Laskowski, Director, Strategic Consulting Services, Mandiant-A FireEye Company

2:40-2:55 Coffee Break Sponsored by FileYourTaxes.com

2:55-3:20 Featured Speaker

Denise Davis, Director, Return Integrity Operations, Wage & Investment (W&I), IRS

3:20-4:00 CERCA 25 Years And Counting

Bernie McKay – Past CERCA Chair & Senior Vice President & Chief Public Policy Officer, Intuit

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

Joe Sica – CERCA Past Chair & Founding Board Member & Chief Public Policy Officer, GreenDot/TPG

**Please Join Us for a Post-Conference Reception Immediately Following
the Conclusion of the CERCA Conference in Studio D
Sponsored by River City Bank and Tax Act**