



**CERCA Spring 2019 Conference Program (as of 5/14/19)**  
**More Speakers & Topics to be Announced**

**Morning Program Begins at 8:30 am**

**Welcome & Introductions**

Tim Hugo, CERCA Executive Director

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

**“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

**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

**Keynote Address: The Honorable Charles P. Rettig**

**Commissioner of the Internal Revenue Service**

**Overcoming Language 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

**COUNCIL FOR ELECTRONIC REVENUE COMMUNICATION ADVANCEMENT**

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## **A View from the Hill – Latest Happenings in Congress**

**Moderator:** Russ Sullivan, Brownstein Hyatt Farber Schreck

**Panel:** The Honorable Phil Bond, President & CEO, Bond & Associates  
Steve Ryan, Partner, McDermott Will & Emery

## **Afternoon Program**

### **Keynote Speaker**

**David Alito, IRS Deputy Commissioner, Wage & Investment**

### **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**