

**November 13, 2019**

**RENAISSANCE ARLINGTON CAPITAL VIEW HOTEL  
CRYSTAL CITY, VIRGINIA**



# **FALL MEETING PROGRAM**

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*presented by*



**Council for  
Electronic  
Revenue  
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# PROGRAM

7:45-8:30 AM

## **Continental Breakfast**

*Sponsored by Jackson Hewitt*



8:30-9:00 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

9:00-9:30 AM

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

Commissioner of the Internal Revenue Service

9:30-10:15 AM

## **“Reducing Paper Refunds-Going Paperless to Improve the Customer Experience”**

**A Panel by the IRS, Bureau of Fiscal Service and Industry**

Moderator:

**Kathy Pickering**, H&R Block

Panel:

**Ronda Kent**, Assistant Commissioner-Payment Management, Bureau of Fiscal Service, US Department of Treasury

**Dianne Garibotto**, Customer Service Accounts, IRS

**Eric Inkrott**, Vice President & Tax Risk Officer, Green Dot Corp.

10:15-10:35 AM

## **Morning Break**

*Sponsored by FileYourTaxes.com*



10:35-11:15 AM

## **“Information (Not Cyber) Security: Current & Emerging Threats”**

**Dr. James Ludes**, Executive Director, Pell Center, Salve Regina University

11:15 AM -  
12:00 PM

## **2020-What to Expect in a Presidential Election Year**

Moderator:

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

Panel:

**The Honorable Tom Davis**, Partner, Holland & Knight

**Russ Sullivan**, Brownstein Hyatt Farber Schreck

# PROGRAM

12:00-1:15 PM

## Lunch

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1:15-2:00 PM

## **"Why Identity Management is a Cyber Security and Privacy Game Changer"**

**Thomas Gann**, Chief Public Policy Officer, McAfee

2:00-2:40 PM

## **Featured Speaker: Ken Corbin**

IRS Commissioner, Wage & Investment

2:40-2:55 PM

## **Coffee Break**

2:55-3:20 PM

## **"#TaxSecurity:Steps To Take to Improve Third-Party Cybersecurity Practices"**

**Robyn Trotter**, Senior Analyst, Strategic Issues, GAO

**Jeff Arkin**, Assistant Director, Tax Issues, Strategic Issues, GAO

3:20-4:00 PM

## **"The Tax Season is Coming, The Tax Season is Coming!"**

**CERCA Members** discuss the upcoming Tax Season

Moderator: **John Sapp**, Drake Software

Panel: **Shannon Bond**, Wolters Kluwer

**Michele Geraci**, Jackson Hewitt

**Bill Nelson**, Republic Bank

***Reception Immediately Following the Conclusion of the CERCA Conference***

***Sponsored by River City Bank***



## CERCA FALL 2019 Attendee List

COMPANY	NAME	TITLE (if provided)
Accenture Federal Services	Marley Bautista	Manager
	Maggie Houston	
	Greg Kane	
	Alex Lira	Senior Manager
	Ken Nesbit	
	Abraham Walker	Senior Manager
Bloomberg Tax	Mark Monica	Director of Operations
Brownstein Hyatt Farber Schreck	Russ Sullivan	
Bureau of the Fiscal Service, Treasury Department	Billy Johnson	Manager
	Ronda Kent	Manager
	Daniel Morrison	Media Relations Specialist
	Thomas Santaniello	Management
	Brett Smith	Manager
CERCA	Karim Azero	Staff
	Tim Hugo	Executive Director
	Vickie Hull	Deputy Executive Director
	Shreya Kanal	Staff
Citizant	Alba M. Alemán	CEO
	Rick Skorny	IRS Customer Advocate
Computer & Communications Industry Association	Dave Macklin	Consultant
CPA.com / AICPA	Greg LaFollette	Strategic Advisor
CPS Consulting	Cedric Swain	Owner
Credit Karma Tax	Julie Magee	Director, Tax Regulatory Affairs
	Christina Taylor	Senior Manager of Tax Operations
CrossLink Professional Tax Solutions	Brett Klutch	Chief Operating Officer
	Rebecca J McCaulley	Tax Analyst
	Mark Castro	Government Relations
Deloitte Consulting	Leigh Braunstein	Specialist Leader
	Sarah Byrne	Senior Manager
	Genevieve Oudar	Managing Director
	Mark Price	Principal
	Chris Wagner	Specialist Executive
Drake Software	Jared Ballew	Government & Industry Liaison
	Jami Gibson	Vice President
	Robin Miles	Director, Federal Tax Development
	John Sapp	Vice President, Strategic Planning
Dun & Bradstreet	Bridget Hally	Business Collaboration Executive
	Mike Hodges	Client Director
Experian	Timothy C Starkey	Director, Strategic Accounts
ezTaxReturn.com	Ron Leder	Managing Member
Federation of Tax Administrators	Verenda Smith	Deputy Director

## CERCA FALL 2019 Attendee List

COMPANY	NAME	TITLE (if provided)
<b>FileYourTaxes.com</b>	Timur Taluy	CEO
<b>GAO</b>	Jeff Arkin	Assistant Director
	Kim Bohnet	Analyst
	Mark Canter	Senior IT Security
	Anna Cielinski	Analyst
	Tom Gilbert	Assistant Director
	Jessica Lucas-Judy	Director
	Neil Pinney	Assistant Director, Tax Policy and Administration
	Erin Saunders Rath	Senior Analyst
	Robyn Trotter	Senior Analyst
	Sarah Wilson	Policy Analyst
<b>Green Dot Corporation</b>	Chris Bagg	Director, Business Development, Tax Products Group
	Eric Inkrott	Vice President, Tax Risk Officer
	Joe Sica	Chief Public Policy Officer, Tax Products Group
<b>Guidehouse</b>	Lisa McLane	Director
<b>H&amp;R Block</b>	Carl Breedlove	Tax Analyst
	Angela Davied	Vice President, Communications
	Ben Deneka	Program Manager, The Tax Institute
	Mimi Nolan	Director, Regulatory Affairs, The Tax Institute
	Andy Phillips	Director, Agency & Industry Relations, The Tax Institute
	Kathy Pickering	Vice President, Regulatory Affairs & Executive Director of The Tax Institute
	Nathan Rigney	Lead, Tax Research Analyst, The Tax Institute
	Mike Slack	Manager, The Tax Institute
	Susan Waldron	Communications Director
<b>Happy Tax</b>	Knox Wimberly	Chief Tax Officer
<b>Holland &amp; Knight</b>	The Hon. Tom Davis	Partner
<b>Intuit</b>	Peggy Bogadi	Consultant
	Daniel Eubanks	Senior Manager, Federal Government Relations
	Lauren Hagwood	Senior Manager, State Tax Regulatory Affairs
	Krista Holub	Program Manager
	Chris Leahy	Vice President, Global Corporate Affairs and Chief Public Policy Officer
	Joe Lillie	Director, Tax Office
	Brian McCullough	Director, Corporate Affairs Government Relations
	Bernie McKay	Strategic Public Policy Advisor
	Jack Rubin	
	David Sullivan	Vice President, Tax Regulatory Affairs
	David Williams	Chief Tax Officer
<b>IRS</b>	Roxanne Barkley	Program Analyst
	Melissa Beck	Senior Program Analyst
	Jackie Benjamin	
	Matthew Bohlmann	Senior Analyst-ID Theft
	Ken Corbin	IRS Commissioner, Wage & Investment
	James Fish	Program Director
	Diane Fox	Industry Engagement
	Dianne Garibotto	Technical Adviser
	Geoff Gerbore	Manager
	Mel Hardy	Director, National Public Liaison

## CERCA FALL 2019 Attendee List

COMPANY	NAME	TITLE (if provided)
IRS (con't.)	Kevin Hatton	Program Manager
	Terry Lemons	Chief, Communications and Liaison
	John Lipold	Chief, Relationship Management, NPL
	Peter Maser	National Account Manager
	Wayne Mercado	Senior National Account Manager
	The Hon. Charles P. Rettig	Commissioner of the Internal Revenue Service
	Theresa Rossi-Franzke	
	Curt Rueter	Deputy Director
IRS, Taxpayer Advocate Service	Juanita Wueller	Director, E-File Services
	Ken Drexler	Senior Advisor to the National Taxpayer Advocate
	Laura Baek	Senior Attorney Advisor to the National Taxpayer Advocate
	Zachary Bend	Presidential Management Fellow
Jackson Hewitt Tax Service	Michele Geraci	Vice President, Tax Products
	Mark Steber	Chief Tax Officer
	Kavitha Subramanian	Chief Privacy Officer
	Jo Willetts	Director, Tax Resources
Latino Tax Pro	Carlos C. Lopez, EA	CEO
	Antonio Martinez, EA	Vice President, Business Development
Leidos	Karen Bell	Portfolio Manager Treasury Solutions & Development (TSD)
	Marsha Malone	Vice President, Strategic Account Executive Intelligence
	Jim Weaver	Senior Program Manager
LexisNexis Special Services Inc	Michelle Cornell	Director, Strategic Alliances - Federal
Maximus Federal	Bill Gagne	Senior Analyst
	Ray Lefebvre	Senior Advisor
	Nick Lopes	Senior Director
	Howard Marcus	Project Manager
	Verlinda Paul	Consultant
	Larry Reagan	Vice President
	Jackie Smith	Director, Business Development
McAfee	Thomas Gann	Chief Public Policy Officer
McDermott Will & Emery	David Ransom	Partner
	Steve Ryan	Partner
Media	William Hoffman	Senior Reporter
MetaBank	John Hagy	Head of Government and Industry Relations
MITRE	Andy Dziejewski	Business Strategist, Senior Principal
	Patti Reid	System Engineering, Principal
	Rich Wysocki	IRS Business Portfolio Manager
	Sidney Gibson	Principal
MRS Tax Enterprises Inc.	LaShaun Smith	Tax Consultant, EA
	Thorman Jerry	President
Neustar	Paul Norton	Senior Principal
Omni Financial	Clarice Landreth, EA	Quality Assurance Analyst

## CERCA SPRING 2019 Attendee List

COMPANY	NAME	TITLE (if provided)
On-Line Taxes, Inc.	Trisha Hale	Vice President of Operations
Optima Tax Relief	Nick Hashimi David King	Counsel CEO
Palantir Technologies	Tim O'Brien Susan Smoter	Forward Deployed Engineer IRS Client Executive
Pell Center, Salve Regina University	James Ludes	Executive Director
Rapidly, Inc.	Matthew Parker	CEO
Refundo	Roger Chinchilla	CEO
Republic Bank & Trust Company	Bill Nelson Bill San Giacomo	President, Republic Processing Group Vice President
River City Bank	Krystal Cornett David Kidner	Vice President Business Development
Scriptel Corporation	Stephan Herron	President & CEO
Sovos	Jeremy Olson	Senior Strategic Programs Manager
Tax Guard	Hansen Rada	CEO
Tax Help Software	Roger Nemeth	President
TaxAct	Jacob Hodges Mark Jaeger Andrew Oswalt Taylor Riley	General Counsel Director, Tax Development Tax Analyst Senior Tax Analyst
TaxExtension.com	Sebastian Ailioaie Dan O'Donnell	CTO CEO
TaxHawk, Inc.	Rick Graham Calvin Whitehead	COO Director of Product Development
Taxslayer	Seth Babb	Director of Consumer Products
Thomson Reuters	Geno Salo	Senior Director
TransUnion	Sean Barnes Stuart Levy	Director, Public Sector Senior Director
Washington Resource Associates	Jim Ruda	Senior Advisor
Wolters Kluwer	Shannon Bond	Vice President & Segment Leader, Preparer Market

**Mark your calendars now for the CERCA  
Spring 2020 Conference • May 21, 2020**  
Renaissance Arlington Capital View Hotel in Crystal City

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