

November 9, 2021

**CRYSTAL GATEWAY MARRIOTT
ARLINGTON, VIRGINIA**



FALL MEETING PROGRAM

GOLD SPONSORS



intuit.

MAXIMUS Federal

Next CERCA Conference:

Spring 2022 – May 25, 2022
Crystal Gateway Marriott
Arlington, Virginia

presented by



Council for
Electronic
Revenue
Communication
Advancement



TUESDAY, NOVEMBER 9th

7:45 - 8:30 AM

Continental Breakfast
Sponsored by Jackson Hewitt

Jackson Hewitt
TAX SERVICE

8:30 AM

Welcome – Geno Salo, CERCA Chair and Director, Thomson Reuters
Tim Hugo, CERCA Executive Director

8:40 - 9:00 AM

**The Electronic Tax Administration Advisory Committee's (ETAAC)
2021 Annual Report to Congress**

Geno Salo, Immediate Past Chair, ETAAC, Thomson Reuters
Courtney Kay-Decker, Current Chair, ETAAC, Lane & Waterman LLP

9:00 - 9:30 AM

KEYNOTE ADDRESS – Charles P. Rettig, IRS Commissioner

9:30 - 10:15 AM

The Latest Tax Legislative Proposals in Congress

MODERATOR: Russ Sullivan, Brownstein Hyatt Farber Schreck

SPEAKERS from both the U.S. House of Representatives and the U.S. Senate (TBA)

10:15 - 10:35 AM

Morning Break

Sponsored by TaxHawk

 **TaxHawk**[®]

10:35 - 11:05 AM

IRS: SADI-New Developments

SPEAKERS: Nan Downing, Director, Identity Assurance Office, IRS
Patrice Wilmot, Director, Identity & Access Management, IRS

11:05 - 11:50 AM

**TIMOTHY GRIBBEN, Commissioner, Bureau of the Fiscal Service,
U.S. Dept. of the Treasury**

11:50 - 12:00 PM

The Free File Program

Timur Taluy, Free File Founding Company and CEO, FileYourTaxes.com

12:00 - 1:00 PM

Lunch

Sponsored by Drake Software

DrakeSoftware[®]

1:00 - 1:40 PM

**November 2021 (and 2022) Elections, Goings on in Congress & More
What Do Our Political Experts See in the Crystal Ball?**

MODERATOR: Tim Hugo, CERCA Executive Director

SPEAKERS: Chris LaCivita, Partner, FP1Strategies
Steve Ryan, Esq.



1:40 - 2:15 PM

“The Crimes They Are A-Changing: New Attacks, New Crimes, New Victims”

James Lee, Chief Operating Officer, The Identity Theft Resource Center

2:15 - 2:30 PM

Afternoon Break

Sponsored by FileYourTaxes.com

anywhere anytime
FileYourTaxes.com
securely

2:30 - 3:00 PM

Join Us on the Tax Pro Account Journey

Sharyn Fisk, Director, Office of Professional Responsibility, IRS
Dietra Grant, Director, Customer Account Services, Wage & Investment, IRS
Andrew Chiu, Director, Product Management, Office of Online Services, IRS

3:00 - 3:30 PM

KEN CORBIN, IRS Chief Taxpayer Experience Officer & Commissioner, Wage & Investment

3:30 - 4:00 PM

What to Expect in the Upcoming 2022 Tax Season

The CERCA Board's past chairs discuss the upcoming tax season

MODERATOR: Geno Salo, CERCA Chair

SPEAKERS: Michele Geraci, Jackson Hewitt
Kathy Pickering, H&R Block
John Sapp, Drake Software
Joe Sica, Green Dot

CERCA Reception Immediately following the conclusion of the Program

Sponsored by



Cash App Taxes

**REPUBLIC
BANK**
*Tax Refund
Solutions®*
republicrefund.com

Thank you to the American Coalition for Taxpayer Rights (ACTR) and TaxAct
for Sponsoring Tuesday Evening's Reception



AMERICAN COALITION FOR
TAXPAYER RIGHTS

TaxAct®

CERCA FALL 2021 CONFERENCE



ATTENDEE LIST

COMPANY / NAME

Accenture Federal Services

Jon Eisenmann
Jerome Farley
Terri Hogan
Maggie aHouston
Greg Kanea
Linda Lewis
Steve St Jacques
Doug Sunshine
Dave Van Mourik

ACCOINTING.com

David Canedo
Peter Johnson
Rodrigo Mayen
Kyle Zhang

ACI Worldwide

Chris Battel
Matt Farrow
Dean Fees

ADP

Pete Isberg

Audit Detective, LLC

Roger Nemeth

Blucora

Ann Bruder
Jacob Hodges

Booz Allen Hamilton

Becky Chiaramida

Brownstein Hyatt Farber Schreck

Russ Sullivan
Mark Warren

COMPANY / NAME

Bureau of the Fiscal Service

Timothy Gribben
Tabitha Guyton
Dara Seaman
Brett Smith
Kevin Wojda

Canopy

Chandler Love

CERCA

Tim Hugo
Vickie Hull
Endira Stewart

CoinTracker

Shehan Chandrasekera

Community Tax

Jessie Seaman

Corvee

Mark Monica

CPS Consulting, LLC

Cedric Swain

Crosslink Professional Tax Solutions

Mark Castro
Rebecca McCaulley

CSC Corptax

Gary Colbert

Deloitte

Sarah Byrne
Brian Gillen
Rory Salzberger
Chris Wagner

**COMPANY / NAME****Drake Software**

Jared Ballew
Jami Gibson
Robin Miles
John Sapp

ETAAC Chair

Courtney Kay-Decker

Experian

Timothy Starkey

ezTaxReturn.com

Ronald Leder

FileYourTaxes.com

Timur Taluy

Fiserv

Kimberly Ford
Jose Garcia
Hal Stein

FP1 Strategies

Chris LaCivita
Mike Young

GAO

Marybeth Acac
Jonathan Ferguson
Bryan Sakakeeny
Erin Saunders Rath
Robyn Trotter
Jason Vassilicos

COMPANY / NAME**Green Dot**

Christoper Bagg
Bradley Cowie
Eric Inkrott
Gregory Partington
Joe Sica

H&R Block

Carl Breedlove
Ben Deneka
Manny Dominguez
Alison Flores
Kevin Martin
Mimi Nolan
Andy Phillips
Kathy Pickering
Julie Sforza-Smith
Kaya Singleton
Mike Slack
Jennifer Villarino
Daniel Woodard

ID.me

Tom DiBenedetto
Jeremy Haynes
Ben Piccarreta
Wes Turbeville

Identity Theft Resource Center

James Lee

Intuit

Peggy Bogadi
Daniel Eubanks
Lauren Hagwood
Joe Lillie
David Sullivan

**COMPANY / NAME****IRS**

Arthur Alvarado
Robert Anuszewski
Roxanne Barkley
Jackie Benjamin
Matthew Bohlmann
Corliss Brooks
Andrew Chiu
Ken Corbin
Melissa Cummings-Niedzwiecki
Denise Davis
Nan Downing
Sharyn Fisk
Janice Foulk
Diane Fox
Matthew Gamble
Geoffrey Gerbore
Juan Goldstrom
Dietra Grant
Reginald Grimes
Deborah Jones
J. Wilson Laverty
Terry Lemons
John Lipold
Wayne Mercado
Mike Oser
Mary Claire Petrosky
Charles Rettig
Milka Rodriguez
Karen Schadler
Jamie Shaw
Sharon Stetler
Devon Stoney
Patrice Wilmot

IRS - Office of the Taxpayer Advocate

Ken Drexler
Susan Morgenstern
Laura Baek

COMPANY / NAME**Jackson Hewitt**

Shawn Bradia
Mark Steber
Kavitha Subramanian
Michele Geraci
Jo-Anne Willetts

Latino Tax Pro

Alberto Contreras
Carlos Lopez

Leidos

Karen Bell
Darius Taylor
Jim Weaver

Louisiana Department of Revenue

Kimberly J. Lewis

Maximus Federal

Ramona Henby
Howard Marcus
Verlinda Paul
Navreet Randhawa
Gabrielle Rivera
Roland Scott

McDermott Will & Emery

David Ransom

Media-Bloomberg Tax

Allyson Versprille

MetaBank

Cassandra Mayberry
Jermaine Shearin

Michigan Department of the Treasury

Glenn White

**COMPANY / NAME****MITRE**

Angus Chen
Andrew Dziwulski
Sidney Gibson
Patti Reid
Rich Wysocki

MRS Tax Enterprises

Thorman Jerry

On-Line Taxes, Inc.

Trisha Hale

Optima Tax

Nick Hashimi
Phil Hwang
Robert Kerr
David King

Refundo

Roger Chinchilla

Republic Bank

Bill San Giacomo

SAIC

Urvesh Shah

Sovos

Wendy Walker

Square Inc/, Cash App Taxes

Julie Magee

State of Maryland

Sharonne Bonardi

COMPANY / NAME**Stephen M. Ryan Consulting Services**

Steve Ryan

Tax Guard

Hansen Rada

TaxAct

Mark Jaeger
Andrew Oswalt
Taylor Riley

TaxHawk

Rick Graham
Calvin Whitehead

TaxSlayer

Seth Babb

Thomson Reuters

Geno Salo

University of Kentucky

Douglas Michael

Visa

Ronda Kent
Graham Mackenzie

Washington Resource Associates

Chris Long
David Macklin

Wave Financial USA Inc

Ida Starling

Wolters Kluwer

Shannon Bond
Stephanie Plaza

THANK YOU TO OUR SPONSORS:

GOLD SPONSORS



**H&R
BLOCK®**

intuit®



**green
dot®**

MAXIMUS® Federal

SILVER SPONSORS

MetaBank 



Wolters Kluwer

SPONSORS



AMERICAN COALITION FOR
TAXPAYER RIGHTS



Cash App Taxes



CROSSLINK®
Professional Tax Solutions

DrakeSoftware®

anywhere anytime

FileYourTaxes.com

securely

Jackson Hewitt®
TAX SERVICE



leidos

**REPUBLIC
BANK**

**Tax Refund
Solutions®**
republicrefund.com

TaxAct®



TaxHawk®