



November 9 2022

Fall 2022 Conference Program

**COUNCIL FOR ELECTRONIC REVENUE COMMUNICATION ADVANCEMENT
RENAISSANCE ARLINGTON CAPITAL VIEW HOTEL**



Fall 2022 Conference Program

CERCA Fall 2022 Conference

November 9, 2022

8:00 AM **CONTINENTAL BREAKFAST** Sponsored by Jackson Hewitt



8:45 AM **WELCOME** – Shannon Bond, CERCA Chair and VP,
Preparer Segment Tax & Accounting, Wolters Kluwer
Tim Hugo, CERCA Executive Director

8:55 AM **KEYNOTE SPEAKER** – Charles P. Rettig, IRS Commissioner
(via video conference)

9:30 AM **The Govini Report** – An Independent Expert Firm's Update on
IRS IT Funding and Modernization,
Related Performance Risks and Challenges
Speaker: Nathan Ruiz, Vice President,
National Security

10:00 AM **MORNING BREAK** Sponsored by Tax Hawk



10:20 AM **IRS Criminal Investigation-Combatting Fraud in 2022 & Into the Future**
Speaker: Mary Hammond
Exec. Director, IRS Criminal Investigation, Advanced Analytics & Innovation

10:50 AM **Tax Season 2023 and Beyond** – The CERCA Board once again leads a
roundtable discussion of the upcoming tax season
Moderator: Timur Taluy, CEO, FileYourTaxes.com
Daniel Eubanks, Intuit, Director, Federal Government Relations
Michele Geraci, Jackson Hewitt, Vice President, Tax
Bill San Giacomo, Republic Bank, Vice President, Director
of Tax Refund Solutions
John Sapp, Drake Software, Chief Revenue Officer

11:20 AM **Featured Speaker:** Ken Corbin,
IRS Chief Taxpayer Experience Officer & Commissioner,
Wage & Investment



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12:00 PM LUNCH Sponsored by Drake Software



1:15 PM The IRS Taxpayer Experience Office

Speakers: Jennifer Amarante, Chief, Multi-Channel Experience Office
Jennifer Davis, Chief, Community Engagement Office

1:45 PM Tax Policy Issues for 2022-2023 – A discussion on policy issues facing the tax industry including the Inflation Reduction Act, Post-Election Lame-Duck Session and Other Topics

Speaker: John Duncan, The Livingston Group
David Ransom, McDermott Will & Emery
Russ Sullivan, Brownstein Hyatt Farber Schreck

2:30 PM AFTERNOON BREAK Sponsored by File Your Taxes



2:45 PM “THE DUST HAS SETTLED – OR HAS IT?” – Political experts will give their reactions to the results of the elections held just the day before and the ramifications of those results.

Moderator: Tim Hugo, CERCA Executive Director

Speakers: Joshua Karp, Partner, Hone Strategies
Mike Young, Managing Director, Political, FP1 Strategies

3:20 PM IRS Communication & Messaging: The Past, the Present, the Future

Speakers: Terry Lemons, Chief, Communications and Liaison
Mel Hardy, Director, C&L Office of National Public Liaison
Jodie Reynolds, Director, C&L, Communications Division
Karin Rice, Director, W&I Communications & Liaison (via video)

CERCA Reception Immediately following the conclusion of the Program

**Thank you to Fiserv. and Optima Tax for
Sponsoring Wednesday’s Reception**



**Thank you to Wolters Kluwer and
TaxAct for Sponsoring Tuesday’s Reception**





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ATTENDEE LIST (As of 11/7/22)

***Attendance:** Virtual (on-line only)

Accenture Federal Services

Terri Hogan
Erica Holmes
Maggie Houston
*Greg Kane
Bennett Kriete
*Keyatta Orlena

CGI Federal

Bob Barr
Isabelle Dikland
Andrew Jennison
Darin Powell

ACI Worldwide

Mike Dregalla

Community Tax

Jessie Seaman

Ad Hoc, LLC

Susan Barron
*Sam Gechter
*Jonathan Internicola
Ben Kutil
Clifton Williams

Corvee

Rebecca McCaulley
Mark Monica

American Coalition for Taxpayer Rights

Steve Ryan

CPS Consulting

Cedric Swain

April Tax Solutions

Leighton Regis

Creative Professional Tax Solutions

*Jim Paille

Audit Detective

Roger Nemeth

Crosslink Professional Tax Solutions

Mark Castro

Booz Allen Hamilton

Becky Chiamida

Deloitte

Sarah Byrne
Chris Wagner

Brownstein Hyatt Farber Schreck

Russ Sullivan

Drake Software

Jared Ballew
Robin Miles
Taylor Rodier
John Sapp

Canopy

Bryson Webster

ezTaxReturn.com

Sarah Hasan

Cash App Taxes

Julie Magee

Federation of Tax Administrators

Sharonne Bonardi
*Terri Steenblock

CERCA

Tim Hugo
Vickie Hull
Mira Jampeissova
Regina Omar



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***Attendance:** Virtual (on-line only)

FileYourTaxes.com	Timur Taluy Amanda White	ID.me	Tom DiBenedetto Jeremy Haynes Ben Piccarreta Wes Turbeville
Fiserv	Jerry McNerney		
FP1 Strategies	Mike Young	Intuit	Peggy Bogadi Daniel Eubanks Lauren Hagwood David Sullivan
Free File Alliance	*Nancy Mathis		
GAO	*Crystal Bernard *Heather Collins Greg Guttman *Melissa King *Ben Moser *Afsana Oreen *Neil Pinney *Erin Saunders Rath	IRS	Jennifer Amarante Robert Anuszewski Jackie Benjamin *LuCinda Comegys Ken Corbin Denise Davis Jennifer Davis Mike DeHerrera Codi Higley Janice Foulk *J.C. Garnish *Geoffrey Gerbore Dietra Grant Mary Hammond Mel Hardy Russell James Terry Lemons John Lipold Paul Mamo Rob Marvin Wayne Mercado
GDIT	Katherine Thomas		
Govini	Nathan Ruiz		
Guidehouse	Lisa McLane		
H&R Block	Ben Deneka Catherine Martin Mimi Nolan		
Hone Strategies	Joshua Karp		



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ATTENDEE LIST (As of 11/7/22)

***Attendance:** Virtual (on-line only)

IRS cont.

*Charles Rettig
Jodie Reynolds
*Karin Rice
Jamie Shaw
Sharon Stetler
Lori Steinbuch
Devon Stoney
Yiliu Wang
*Tara Wells

IRS - Taxpayer Advocate Service

Laura Baek
Ken Drexler

Jackson Hewitt

Mark Steber
Michele Geraci
Jo Willetts

Lane & Waterman

Courtney Kay-Decker

Latino Tax Pro

Carlos Lopez

Leidos

Karen Bell
Bob Jones
Darius Taylor

Livingston Group

John Duncan

Maximus

Zain Baig
Gina Bornarth
*Ramona Henby
Howard Marcus
Elizabeth McCarthy
Verlinda Paul

Maximus cont.

Rob Ragano
Gabrielle Rivera
Roland Scott

McDermott Will & Emery

David Ransom

Media-Thomson Reuters

Christopher Wood

MITRE Corporation

Angela Camp
*Angus Chen
Andy Dziewulski
Sidney Gibson
Jamel Morris
Patricia Reid

MRS Tax

Thorman Jerry

On-Line Taxes

*Yenni Wilhelm
Trisha Hale
*Hillary Sanz

Optima Tax

Nick Hashimi
Phil Hwang
Bob Kerr

Pathward

*Clark Gill
Cassandra Mayberry
*Jermaine Shearin



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***Attendance:** Virtual (on-line only)

Pegasystems

*Mike DiCarlo
*Hope Good
Michael Hemmer
Alexei Ivanov
*Sung Kim
*Andy Marsh
TJ Oleksiak
*Michael Rosenthal
*Bob Smith

TaxBit

Lisa Beaman
Mark Hilburger
Dale Houser
Nathan Jones

TaxHawk

Rick Graham
Calvin Whitehead

TaxSlayer

Seth Babb

Quantexa

Christopher Mauldin
Susan Smoter

Thomson Reuters

Geno Salo

TPG

Christopher Bagg
Eric Inkrott
Eric King

Refundo

Jonathan Hoyos
Taylor Pedersen

TransUnion

Ryan Paul

Republic Bank

Carter Dempsey
Alan Keling
Bill San Giacomo

Tropical Tax Solutions

*Jerry Gaddis

Revenue Solutions Inc

Ira Keller

Visa

Ronda Kent
Joe Delaney

Tax Guard

Hansen Rada

Washington Resource Associates

*Chris Long
Dave Macklin

Tax Protection Plus

Michael Cairo

TaxAct

Lacey Crowe
*Mark Jaeger

Wolters Kluwer

Shannon Bond
Stephen Minich
Stephanie Plaza

TaxAct/Blucora

*Ann Bruder

ZMFLaw

Eric Hylton



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