

The logo for CERCA features the letters 'CERCA' in a bold, white, sans-serif font. A stylized lightning bolt, composed of several overlapping geometric shapes, strikes the letter 'A' from the top right. The background is a complex, multi-layered geometric pattern of green and white shapes, creating a sense of depth and movement.

# CERCA

COUNCIL FOR ELECTRONIC REVENUE COMMUNICATION ADVANCEMENT

## **FALL 2023 Conference**

Crystal Gateway Marriott, Arlington, Va | October 25, 2023



## FALL 2023 Conference

### 8:15 AM CONTINENTAL BREAKFAST

Sponsored by Jackson Hewitt Tax Service



**8:45 AM WELCOME** – Shannon Bond, Vice President & Segment Leader, Wolters Kluwer & CERCA Chair  
Tim Hugo, CERCA Executive Director

### 9:00 AM “NEW CRYPTO PROPOSED REGULATIONS ARE FINALLY HERE”

#### **SPEAKERS:**

Julie Foerster, Project Director, IRS Digital Assets Initiative  
Mark Hansmeier, Senior Revenue Agent

### 9:45 AM THE ELECTRONIC TAX ADMINISTRATION ADVISORY COMMITTEE'S (ETAAC) 2023 REPORT TO CONGRESS

#### **SPEAKERS:**

Jared Ballew, Past ETAAC Chair and Vice President of Government Relations, TaxWell  
Timur Taluy, ETAAC Chair and CEO, FileYourTaxes.com

### 10:10 AM MORNING BREAK

Sponsored by TaxHawk



**10:30 AM KEYNOTE SPEAKER** — The Honorable Danny Werfel, 50th IRS Commissioner

### 11:15 “AI-N’T NO TAXING MATTER: THE PROMISE AND THE PERIL OF AI IN TAX ADMINISTRATION”

A Conversation with Dr. Sanith Wijesinghe, Technical Fellow, MITRE and  
Kathy Pickering, H&R Block Chief Tax Officer and the Security Summit  
IDTTRF ISAC Senior Executive Board Member

### 12:00 LUNCH

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**1:10 FEATURED SPEAKER** — Ken Corbin, IRS Chief Taxpayer Experience and Commissioner,  
Wage and Investment





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### 1:45 "A REFRESHED APPROACH TO EITC COMPLIANCE"

#### **SPEAKERS:**

Tracey Carter, Director, IRS Stakeholder Partnerships, Education and Communication  
Jim Clifford, Director, Return Integrity and Compliance Services, IRS

### 2:15 PM AFTERNOON BREAK

Sponsored by [FileYourTaxes.com](https://www.fileyourtaxes.com) and [ID.me](https://www.id.me)

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**2:30 PM FEATURED SPEAKER** — The Honorable Randy Feenstra (IA-4), U.S. House of Representatives  
Member of the House Ways and Means Committee

### 3:00 PM "BEYOND EXPECTATIONS: TRANSFORMING THE IRS"

Tommy Smith, Director-Strategic Integration, IRS Transformation & Strategy Office

### 3:30 PM THE CERCA BOARD LEADS A ROUNDTABLE DISCUSSION OF THE UPCOMING TAX SEASON

#### **MODERATOR:**

CERCA Chair – Shannon Bond, Wolters Kluwer

#### **SPEAKER:**

Pete Isberg, ADP, Inc., Vice President, Government Relations  
John Sapp, Drake Software, Chief Revenue Officer  
Eric Inkrott, Green Dot, Vice President, Government and Partner Relations  
Daniel Eubanks, Intuit, Director, U.S. Corporate Affairs and Public Policy  
Michele Geraci, Jackson Hewitt, Vice President, Tax

### Thank you to ACTR and TaxAct for Sponsoring Tuesday's Reception

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### CERCA Reception Immediately Following the Conclusion of Today's Program

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