

The logo for CERCA features the letters 'CERCA' in a bold, white, sans-serif font. A stylized lightning bolt, composed of several overlapping lines, strikes the letter 'C' from the left and extends across the 'E' and 'R'. The background is a complex geometric pattern of overlapping triangles in various shades of green, creating a 3D effect.

COUNCIL FOR ELECTRONIC REVENUE COMMUNICATION ADVANCEMENT

FALL 2025 Conference

The Westin Arlington, Arlington, Va | October 22, 2025



FALL 2025 Conference

8:00 AM CONTINENTAL BREAKFAST Sponsored by:

Jackson Hewitt and FileYourTaxes.com



9:00–9:15 AM Opening Remarks: Timur Taluy, CERCA Chair and CEO of FileYourTaxes.com

Tim Hugo, CERCA Executive Director

9:15 AM – 10:00 AM The CERCA Board leads a Roundtable Discussion of the Upcoming Tax Season

MODERATOR: Timur Taluy, CERCA Chair & CEO of FileYourTaxes.com

SPEAKERS: Jamie Shaw, Senior Director, Government & Business Relations, Green Dot
Andy Phillips, Vice President, The Tax Institute, H&R Block
Michele Geraci, Vice President, Tax Development, Jackson Hewitt
Jared Ballew, Vice President of Government Relations, TaxWell

10:00 AM – 10:30 AM MORNING BREAK Sponsored by: Republic Bank



10:30 AM – 11:20 AM Happenings on the Hill – A Discussion on Administration and Congressional Activities as it Affects the Tax Industry

SPEAKERS: Brownstein Hyatt Farber Schreck: Russ Sullivan, David Ransom,
Jones Walker: Paul Cambon, Marybeth Nassif

11:20 AM – 12:10 AM Working Families Tax Cut – Payroll & Information Reporting Unplugged

MODERATOR: Dawn Miller, Senior Vice President, On-Line Taxes

SPEAKERS: Dan Lewis, Vice President of Compliance & Government Affairs, ADP
Wendy Walker, Vice President-Regulatory Affairs, Sovos

12:10 PM – 1:30 PM LUNCH Sponsored by: Taxwell



1:30 PM – 1:55 PM Electronic Tax Administration Advisory Committee (ETAAC) Report

SPEAKERS: Amy Wang Miller, ETAAC Chair & Senior Director-Government Affairs, ADP
Vernon Barnett, ETAAC Past Chair & Commissioner of Revenue, State of Alabama



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**1:55 PM – 2:40 PM Working Families Tax Cut: Economic & Revenue Effects,
Implementation Hurdles and State Tax Implications**

The Tax Foundation: Jared Walczak, Vice President of State Projects
Dr. Will McBride, Chief Economist &
Stephen J. Entin, Fellow in Economics

2:40 AM – 3:00 PM AFTERNOON BREAK Sponsored by: TaxHawk and TaxSlayer



3:00 PM – 3:40 PM Keynote Speaker – The Honorable Ken Kies

Assistant Secretary for Tax Policy
The U.S. Department of the Treasury

**Thank you to our Sponsor of
Tuesday Night's Reception**

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**CERCA Reception Immediately following the
conclusion of today's Program**

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ATTENDEE LIST

22nd Century Technologies	Sovon Mookerjee	Equifax	Rob Edwards
Accenture Federal Services	Rob Leahy Sukhjot Sidhu	Ernst & Young	Valerie Jorge Abhishek Misra Jay Ridder Luke Runion
ACI Worldwide	Dean Fees		
ADP	Dan Lewis Amy Miller Tony Tullo	eTelligent Group	Jim Vant Nan Downing
Alabama Department of Revenue	Vernon Barnett	Federation of Tax Administrators	Brian Oliner
April	Christina Taylor	FileYourTaxes.com	Timur Taluy Amanda White
Brownstein Hyatt Farber Schreck	David Ransom Russ Sullivan	Fiserv.	Jerry McNerney
CERCA	Tim Hugo Vickie Hull Mayeli Tarawali	GDIT	Anne Shepherd Linda Terlecki
Chevo Consulting	Jeffrey Cooper	Green Dot	Brad Cowie Jamie Shaw
Community Tax	Christian Eiler	H&R Block	Manny Dominguez Alison Flores Andy Phillips Julie Sforza-Smith Mike Slack
Crosslink Professional Tax Solutions	Mark Castro		
Deloitte	Mike Beland Sarah Byrne Matt Gentile Chris Wagner	Halcyon	Beth Boonin Jim McGowan
Drake Software	LaDonna Keener Robin Miles Amanda Watson	IBM	Susy Greer
		ID.me	Tom Dibenedetto Varun Lal



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ATTENDEE LIST (Continued)

Instead	Rebecca McCaulley	Media-Thomson Reuters Checkpoint	Maureen Leddy
Intuit	Peggy Bogadi Daniel Eubanks Lauren Hagwood Michaelle McMullin Bijan Mehryar	MITRE	Patti Reid
IVIX Tech	Paul Reyff	On-Line Taxes	Dawn Miller
Jackson Hewitt	Michele Geraci Jared Heady Mark Steber	Optima Tax	Phil Hwang David King
Jones Walker	Paul Cambon Marybeth Nassif	Pathward	Chris Bagg
Kilda Group	Chris Anderson John Hopkins	Pegasystems	Michael Hemmer Paul Najdzin
Leidos	Kevin Bierschenk	Quantexa	Frank Ignazzitto Chris Mauldin Susan Smoter
Liberty Tax	Jim Swartzbaugh	Refundo	Trisha Hale
Makpar Corporation	Asad Khan Kaamil Khan Mushtaq Khan	Republic Bank	Carter Dempsey Bill San Giacomo
Maximus	Sabra Gardner Howie Marcus Dominic Palumbo Darryl Scott	SAIC	Lisa McLane
Media-Bloomberg Tax	Erin Slowey	SD Solutions	Chitra Dhayalan
Media-Tax Notes	Ben Valdez	Sentilink	Dan Hildenbrand Jason Kratovil
		Sigma Tax Pro	Brad Anderson
		Skadden, Arps	Fred Goldberg
		Sovos	John Kreger Wendy Walker



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ATTENDEE LIST (Continued)

**Square/Cash App/Cash App Taxes
Tax Ai**

Julie Magee
Alyssa Whatley

Tax Guard

Dave Bohrman

**Tax Guardian
Tax Help Software**

Ron James
Bob Kerr
Roger Nemeth
Roger Nemeth, Jr.

Tax on Demand

Adam Rahll

Tax Protection Plus

Sean Arteaga
Mike Cairo
Jill Evans
Chrissy Flowers

TaxHawk

Rick Graham
Calvin Whitehead

TaxNow

Kenny Dettman

TaxSlayer

Seth Babb

Taxwell

Jared Ballew
Dermot Halpin
Willa Kalaidjian
Sugata Mukhopadhyay
Taylor Rodier

TFranz Consulting

Theresa Franzke

The Tax Foundation

Will McBride
Jared Walczak

Transunion

Kedren Dillard
Ryan Paul

U.S. Department of Treasury

Ken Kies

VISA

Joe Delaney

West 4th LLC

Charles Muotoh

Wolters Kluwer

Karin Anderson

Other Attendees

Patrick Nagle

CERCA CONFERENCE
SAVE THE DATE

CERCA SPRING 2026

Thursday, May 14, 2026
Washington Marriott at Metro Center

CERCA FALL 2026

Wednesday, October 28, 2026
Washington Marriott at Metro Center



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