



COUNCIL FOR ELECTRONIC REVENUE COMMUNICATION ADVANCEMENT

FALL 2026 Conference

Washington Marriott at Metro Center | October 29, 2026
Washington, D.C.



FALL 2026 Conference

7:45–8:45 AM CONTINENTAL BREAKFAST Sponsored by: Jackson Hewitt



8:45–9:00 AM Welcome — Daniel Eubanks, CERCA Chair, Vice President and Head of US Federal Government Relations, Intuit
Tim Hugo, CERCA Executive Director

9:00–9:20 AM The Electronic Tax Administration Advisory Committee's (ETAAC) 2026 Annual Report to Congress

SPEAKERS: Amy Miller, Immediate Past Chair, ETAAC, ADP Senior Director of Government Affairs
David Casey, Chair, ETAAC and Secretary of the Wisconsin Department of Revenue

9:20–10:05 AM “Artificial Intelligence and Taxation: Balancing Efficiency with Ethics”

Dr. Jesse Kirkpatrick, Research Associate Professor and Co-Director of the Mason Autonomy Robotics Center, George Mason University
Karin Anderson, Vice President, Tax Compliance Solutions, Wolters Kluwer

10:05–10:30 AM MORNING BREAK Sponsored by: FileYourTaxes.com and Tax Hawk



10:30–11:00 AM Featured Speaker — Ken Corbin, Chief, Taxpayer Services, IRS

11:00–12:00 PM The Security Summit: A Decade of Partnering to Protect Taxpayers and a Future of Innovation

MODERATOR: Timur Taluy, CEO, FileYourTaxes.com

PANELISTS: Jim Clifford, Director, IRS Return Integrity Compliance (RICS) Office
Cassie Dreyer, Senior Tax Analyst, RICS Office, IRS
Sharonne Bonardi, Federation of Tax Administrators (FTA) Executive Director
David Harris, FTA President and Director, Illinois Department of Revenue
Jared Ballew, Vice President of Government Relations, TaxWell
Mark Steber, Chief Tax Officer, Jackson Hewitt

12:00–1:15 PM LUNCH Sponsored by: Taxwell



1:15–2:00 PM “Reading the Tea Leaves: What the 2026 Elections Could Mean for Tax Legislation”

MODERATOR: Jamie Shaw, Senior Director, Government and Business Relations, SBTPG/Green Dot

SPEAKERS: Russ Sullivan, Co-Chair of BHFS National Tax Policy Group, Brownstein Hyatt Farber Schreck
Sean Clerget, Senior Principal, Cozen O'Connor



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2:00–2:20 PM AFTERNOON BREAK Sponsored by: TaxSlayer



2:20–3:00 PM KEYNOTE SPEAKER – The Honorable Frank J. Bisignano Chief Executive Officer, IRS

3:00–3:30 PM Featured Speaker — Kevin Salinger, Acting Assistant Secretary for Tax Policy (Treasury)
and Acting Chief Counsel (IRS)

3:30–4:15 PM What to Expect in the Upcoming 2027 Tax Season

The CERCA Board once again leads a roundtable discussion of the upcoming tax season

MODERATOR: Andy Phillips, Vice President, The Tax Institute, H&R Block

SPEAKER: Seth Babb, Head of Product, TaxSlayer

Michele Geraci, Vice President, Tax Development, Jackson Hewitt

Bill San Giacomo, Vice President, Director of Tax Refund Solutions, Republic Bank

Dawn Miller, Senior Vice President-Products, On-Line Taxes

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Wednesday Night's Reception**

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

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Accenture Federal Systems	Courtney Colburn Rob Leahy Nick Panepucci	CP Sent	Cedric Swain
		Crosslink Tax	Mark Castro Trisha Hale
ACI Worldwide	Mike Dregalla Dean Fees	Deloitte Consulting	Matt Gentile Brian Gillen Rahul Gulati Chris Wagner
ADP	Amy Miller		
Analytica	Johnie Reyes	Delvio Tax	Ken Lill
Anika Systems	Kiran Gullapalli Saju Varghese	Drake Software	LaDonna Keener Amanda Watson
April Tax	Christina Taylor	Equifax	Rob Edwards
BDO	Simona Vasile	eTelligent	Nan Downing
Bland.Ai	Remy Mackel Anna Penn	ezTaxReturn.com	Sarah Hasan
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CERCA	Tim Hugo Vickie Hull Mayeli Tarawali	FileTax.com	Elizabeth Mercurio
		FileYourTaxes.com	Timur Taluy Amanda White
Cherokee Federal	Bijan Nekoie	FIRPTA Solutions	James Cassidy Elijah Meyers
CKN Consulting	Gwen Garren Colleen Newman	Fiserv.	Jerry McNerney
		GAO	Evan Ismail Alan Rozzi Ralanda Sasser Erin Saunders Rath
Community Tax	Markos Banos Nick Charveron		
Cozen O'Connor	Sean Clerget		



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GDIT	Patrice Wilmot	IRS (Continued)	Keegan Brown
			Vernon Brown
George Mason University	Jesse Kirkpatrick, PhD.		Anthony Burke
			Maria Cheeks
Guidehouse	Nancy Sieger		Jim Clifford
			Ken Corbin
H&R Block	Manny Dominguez		Mike Deneroff
	Alison Flores		Cait DeStefano
	Andy Phillips		Joe Dianto
	Julie Sforza-Smith		Ken Drexler
			Cassie Dreyer
Halcyon	Elizabeth Boonin		Adam Gaddamanugu
	Jim McGowan		Nancy Gilmore
			Dietra Grant
IBM	Susy Greer		John Guyton
			Carl Horn
ID.me	Tom Dibenedetto		Courtney Kay-Decker
	Varun Lal		Jim Keith
	Wes Turbeville		Kristen Landreth
			Kyle Lockley
Instead	Rebecca McCaulley		Rob Marvin
			Holly McCarroll
Intuit	Rob Burlison		Sarah McLemore
	Daniel Eubanks		Mohammad Mesbahi
	Lauren Hagwood		Stephanie Needham
	Colton Hamming		Michael Neuwirth
	Bijan Mehryar		Stephanie Parrish
	Jenna Spearman		Nick Perrine
			Chris Pleffner
IRS	Saiful Ahmed		Levi Roethler
	Victor Aledo		Ashley Stevens
	Robert (Ski) Anuszewski		Andrea Tipton
	Laura Baek		Brenda Walsh
	Shawn Baker		Tara Wells
	Andrew Beckwith		Keondra Whetstone
	Biz Bedane		Joshua Winkler
	Frank Bisignano		
		IRS Solutions	David Stone
			Suzanne Stone



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Kilda Group	Christopher Anderson Teresa Donovan John Hopkins	Plaid	Kat Faley
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Liberty Tax	Jim Swartzbaugh	Refundo	Samuel Gonell Emilio Jimenez Steve Krake Milene Palhais Chad Smith
Maximus	John Hiruta Darryl Scott		
Media-Bloomberg Tax	Erin Slowey	Republic Bank	Bill San Giacomo
Media-Thomson Reuters	Bill Flook	SAIC	Lisa McLane
Media-Politico	Danny Nguyen	Salesforce	Ajay Kattige Ron Leidner Alexis Wu Christie Yerks Luhrs
Media-Tax Analysts	Ben Valdez		
Mitre	Meredith McCullough	SBTPG/Green Dot	Jamie Shaw
MRS Tax Enterprises	Thorman Jerry Lashaun Smith	SentiLink	Camille Bartsch Dan Hildenbrand Luke Wolf
Olympus Solutions	Roger Adams		
On-Line Taxes	Dawn Miller	Sovos	John Kreger Wendy Walker
Optima Tax	Phil Hwang David King	State of Illinois	David Harris



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State of Wisconsin	David Casey	Taxwell	Jared Ballew Dermot Halpin Willa Kalaidjian
Stephen M. Ryan Consulting Services	Steve Ryan		
Tax Dava	Keith Downer	Transunion	Kedren Dillard
Tax Foundation	Jared Bulla	TTEC Digital	Teresa Sabol
Tax Guard/Cogency	Dave Bohrman	U.S. Department of the Treasury	Bill Evans Christian Garcia Kevin Salinger
Tax Guardian	James Simmons Travis Watkins		
Tax Help Software	Bob Kerr Roger Nemeth, Jr.	U.S. Treasury-TIGTA	Deann Baiza Melinda Dowdy Jennifer Earls Phyllis Heald London Curtis Kirschner Jonathan Lloyd Diana Tengesdal
Tax Protection Plus	Mike Cairo Matt Lievens		
TaxAct	Summer Pingel Taylor Riley	Urban-Brooking Tax Policy Center	Bob Weinberger
TaxHawk	Kim Oberg Calvin Whitehead	Verito	Terry Lemons
TaxNow	Kenny Dettman	Voyatek	Kelly Epley Yongrui Fan Ilya Gerner
TaxSlayer	Seth Babb	Wolters Kluwer	Karin Anderson
Tax Status	Tom Buttine Christine Young	Zenwork	Patrick Nagle

CERCA SPRING 2027 CONFERENCE

Washington Marriott at Metro Center
Thursday, May 20, 2027

CERCA FALL 2027 CONFERENCE

Washington Marriott at Metro Center
Thursday, October 28, 2027



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