2020 IRSAC Member Biographies

* W. Edward “Ted” Afield – Mr. Afield is the Mark and Evelyn Trammell Associate Professor and Director of the Philip C. Cook Low-Income Taxpayer Clinic at Georgia State University College of Law, one of the largest academic low-income taxpayer clinics in the country. Professor Afield’s research focuses on a range of tax procedure issues relating to tax compliance and professional regulation, state and federal tax issues that impact educational policy, as well as more practice focused doctrinal research into tax procedure for the practicing bar and, in particular, for the community of low-income taxpayer clinics. Professor Afield is a member of the American Bar Association, the Association of American Law Schools, and the National Tax Association He holds a J.D. from Columbia Law School, an LL.M. (taxation) from the University of Florida Levin College of Law, and an A.B. in history, cum laude, from Harvard College. (Small Business/Self-Employed Subgroup)

* Martin Armstrong – Armstrong is VP of Payroll Shared Services for Charter Communications, a Fortune 100 company and the second largest cable operator in the United States. He has held executive roles with Time Warner Cable and Caesars Entertainment, is a retired Navy Supply Corps officer, and is currently the Accounting & Finance Area Chair for the University of Phoenix, where he was named the 2018 Distinguished Faculty of the Year. Armstrong is a former Vice President, Board of Advisor, and current member for the American Payroll Association, the Society for Human Resource Management, the National Association of Tax Professionals, the American Society for Quality, and the Academy of Management. Armstrong is also an Advisory Board member for the Bloomberg Tax Payroll Administration Library and the Workforce Institute, is a Certified Payroll Professional (CPP), and holds a MBA degree from the University of Maryland University College (UMUC), and a Doctor of Business Administration (DBA) degree from Argosy University. Dr. Armstrong has written for, or been covered by, the APA’s PAYTECH magazine, the Bloomberg Tax Payroll Administration Guide, Human Resource Executive, The Paycard Advisor, Accountant’s World, The Institute of Management & Administration, Training Magazine, and Business Finance. (Tax Exempt & Government Entities Subgroup)

Martin Bentsen – Mr. Bentsen is an attorney and director of product development, FIS Wall Street Concepts (WSC), in New York, NY. He interacts with hundreds of financial firm clients on tax reporting matters. WSC’s client base is comprised of self-clearing brokerage firms, hundreds of trust companies, large online brokers and international banking institutions and firms in the asset management advisory business. Mr. Bentsen is the lead for WSC’s “Tax Community” outreach to clients, which provides a forum for clients to express their views and positions on tax-reporting matters. He is a member of the New York State Bar Association and a certified regulatory and compliance professional. (Large Business and International Subgroup)

* Sharon Brown – Ms. Brown is a partner at Barclay Damon LLP, where she is a member of the Tax and Public Finance Practice Areas and the tax credits team. She primarily concentrates her legal practice on the federal tax treatment of tax-exempt bond financings
and serves as bond counsel, underwriters’ counsel, and special-tax counsel. Ms. Brown also routinely handles a wide variety of public finance transactions, including multifamily and single-family housing, power and energy, and 501(c)(3) financings. She has been named to Law360’s Influential Women in Tax Law list, and she received the Trailblazing Women in Public Finance Award from The Bond Buyer in 2018. In addition to her role at Barclay Damon, Ms. Brown is a federal income-tax adjunct at Monroe College. She is a member of the National Association of Bond Lawyers, the New York State Association for Affordable Housing, the New York State Government Finance Officers Association, and the Municipal Forum of New York. (Tax Exempt & Government Entities Subgroup)

Alexandra Cruz – Ms. Cruz is a Senior Manager in the Information, Reporting & Withholding practice of Ernst & Young’s Financial Services Office in New York. Ms. Cruz works with large asset management and banking organizations with both domestic and nonresident alien reporting and withholding issues. For the past six years, she has been primarily focused on FATCA and its impact on the asset management industry. Ms. Cruz was a member of the Information Reporting Program Advisory Council in 2018. She is an attorney and is a member of the bar in the state of New York. (Large Business and International Subgroup)

Ben Deneka – Mr. Deneka serves as industry operations liaison with The Tax Institute at H&R Block. In addition to managing H&R Block’s relationship with the IRS, Mr. Deneka represents H&R Block in the Security Summit and various industry working groups, including CERCA. He has over 7 years of experience providing expertise on IRS administration and informing his business partners on how to effectively implement standards and practices into H&R Block’s scaled tax preparation operation, which includes over 10,000 U.S. tax offices and a robust suite of do-it-yourself tax products. Mr. Deneka earned his B.A. from the University of Mississippi and J.D. from the University of Mississippi School of Law. He currently resides in Pittsburgh, PA. (IRSAC Vice Chair and Wage & Investment Subgroup)

Michael Engle – Mr. Engle is a partner with BKD, LLP in Kansas City, MO. He has extensive experience working with exempt organizations and governmental entities on various tax issues including employment tax. He has direct experience working with nonprofit hospitals and colleges and universities. He has written a number of technical articles and has been a presenter for conferences and webinars. He is a CPA and actively involved with the AICPA. He serves on the BKD, LLP non-profit committee and is the leader of its healthcare committee. He is involved with the AICPA and the Missouri Society of CPAs. (Tax Exempt & Government Entities Subgroup Chair)

Diana Erbsen – Ms. Erbsen is a New York based tax partner at DLA Piper, where she has worked since 2000, except during her service as the Deputy Assistant Attorney General for Appellate and Review for the Tax Division of the US Department of Justice, which position she held from November, 2014 until January, 2017. During her tenure at the DOJ Tax Division, Ms. Erbsen oversaw the Appellate Section, the Office of Review (responsible for civil settlements), and the Financial Litigation Unit (tasked with collecting judgments secured by the Trial Sections of the Tax Division). She was also actively
involved in the management and operations of the Civil and Criminal sections of the Tax Division and served in an ex officio capacity on the Bankruptcy Rules Advisory Committee. Since returning to DLA Piper, Diana has resumed representing clients (public and privately held corporations, as well as partnerships estates and individuals) in all aspects of sophisticated, challenging tax disputes. She concentrates her practice on federal, state and local tax controversies, including criminal tax matters. Informed by her experience at the DOJ, she regularly counsels clients on issues relating to judicial deference to IRS guidance as well as on the appeal process and the intersection of criminal and civil tax enforcement. In 2018, Ms. Erbsen was selected as a member of the IRSAC and during 2019 she chaired the LB&I Subgroup. She also serves on the Council of the ABA Tax Section, in which capacity she oversees the operations of the Civil & Criminal Tax Penalties Committee, the Tax Policy & Simplification Committee and the Standards of Tax Practice Committee. Ms. Erbsen earned her B.A. degree from Amherst College (cum laude), J.D. from Northeastern University School of Law, and LL.M. from NY School of Law. She has been recognized by the American College of Tax Counsel as a Fellow. (IRSAC Chair and Large Business and International Subgroup)

Deborah Fox – Ms. Fox is a Certified Scrum Product Owner (CSPO) in Boca Raton, FL, with experience in a broad spectrum of verticals. As the Director of Marketing she is responsible for developing future strategy for tax solutions portfolio. She has a broad background in all aspects of product management, including business case development, project management, partner management, development, operations, client services, systems analysis, sales and quality assurance. Ms. Fox is a self-starter with team building and leadership skills, as well as a strategic thinker with market analysis skills. She is currently pursuing her EA designation. (Small Business/Self-Employed Subgroup)

April Goff – Ms. Goff a Partner with the law firm Perkins Coie LLP in Dallas, TX. Prior to joining Perkins Coie LLP, she acted as the sole in-house ERISA counsel for J. C. Penney Corporation, Inc. and was in private practice since 2003 with Holland & Knight LLP, Sonnenschein Nath & Rosenthal LLP (now Dentons LLP), Seyfarth Shaw LLP, and Warner Norcross & Judd LLP where she assisted clients ranging from small employers to Fortune 50 companies on complex employee benefit plans and strategic labor and employment issues. Ms. Goff holds multiple leadership roles within the American Bar Association, currently serving as the Vice-Chair of the Employee Plans and Executive Compensation Group under the Real Property Trusts & Estates Division and acting as a publications editor and columnist. She held multiple leadership positions at the local and national level with the Association of Corporate Counsel while in-house, including acting as the national Vice Chair of the national Employment and Labor Law Network. She also serves on the TEGE Council – Gulf Coast Area. Ms. Goff is CIPP/US certified and a frequent speaker and author on a variety of ERISA, Labor & Employment, and Cybersecurity and Data Privacy topics. She completed her B.B.A. in Financial Institution Management and a minor in Economics from Tarleton State University at age 18, and Ms. Goff went on to obtain an M.B.A. with an emphasis in Global Finance from Baylor University and a J.D. from St. Thomas University School of Law. (Tax Exempt & Government Entities Subgroup)
**Antonio Gonzalez** – Mr. Gonzalez is a CPA and Founder and Co-Owner of Sydel Corporation in Coral Gables, FL, an accounting and information technology consulting firm specializing in the financial services industry. He designs and develops multilingual applications to assist financial institutions manage both operations and compliance functions. Sydel's flagship product CompliXpert includes a taxation module for FATCA, CRS and 1042-S reporting in addition to proactive, alert-based activity monitoring and watch list name checking technologies leveraged by both domestic and international financial institutions. Mr. Gonzalez is currently an appointed board member of the City of Coral Gables Property Advisory Board. He earned a B.B.A. degree in Accounting from the University of Wisconsin-Madison and a M.S. in Accounting (specialization in Accounting Information Systems) from Florida International University. *(Wage & Investment Subgroup)*

* Robert Howren – Mr. Howren has 33 years of tax experience all in the Atlanta, Georgia area. The last 15 years he has been the Head of Tax for BlueLinx Corporation, one of the nation's largest building products distributors. At BlueLinx, Mr. Howren brought all areas of the tax function in house including income, financial provision, sales & use, property and fuel. In addition, he oversaw the tax due diligence for BlueLinx's acquisition of Cedar Creek in 2018. Mr. Howren has also created the in-house tax function at three other corporations during his corporate career. At the various companies, he has dealt with both inbound and outbound tax issues including transfer pricing issues. The first 10 years of his career was in public accounting. He started his career at Price Waterhouse before moving to a local CPA firm. Mr. Howren is a past international president of the Tax Executives Institute, where he has been a member for over 22 years. As President and a member of the Executive Committee of TEI, he has led and participated in numerous Internal Revenue Service and Treasury Liaison meetings. He is a long time member of both the Georgia Society of CPAs and the AICPA. Mr. Howren holds a B.S. (Accounting) from Berry College and his MAcc (Tax and Auditing Systems) from the University of Georgia. He has served as President and a Member of the Board of Directors for many years for the Empty Stocking Fund. He is also an Eagle Scout. *(Large Business and International Subgroup)*

* Denise Jackson – Ms. Jackson is the Vice President of Tax Preparer Development for the State Employees' Credit Union in Raleigh, NC. She supervises and coordinates the training program for over 3,000 tax preparers for the credit union’s 267 branches across North Carolina. She is an Enrolled Agent and CFP® practitioner and holds a Bachelor of Science from Wingate University in Business and Mathematics. *(Wage & Investment Subgroup)*

**Sanford Kelsey** – Mr. Kelsey works with ecommerce tax issues at Expedia Group. He is a CPA and attorney with experience in government and private law practice. He worked on administrative and legislative initiatives while in government. In addition, his tax experience includes structuring transactions and providing representation during tax contests. He is a member of the ABA Tax Lawyer Editorial Board. Mr. Kelsey earned both J.D. and LL.M. degrees. *(Large Business and International Subgroup)*
Phyllis Jo Kubey – Ms. Kubey has over 30 years of experience in taxation. She is the owner of Phyllis Jo Kubey, EA CFP NTPI Fellow Tax Preparation & Consultation in New York, NY – offering tax preparation, planning, and representation services to a diverse population of clients. She is actively involved with professional associations at the local, state and national levels. She is a member of the National Association of Enrolled Agents (NAEA) and the New York State Society of Enrolled Agents (NYSSEA). She served as moderator for NYSSEA’s Tax Questions Google Group, an online tax-related discussion forum. She is the Chair of NAEA PAC Steering Committee and regularly attends NAEA’s national conferences and board meetings. She is an officer (2nd Vice President) of NYSSEA and serves on its Membership, Government Relations, and IRS Continuing Education Reporting Committees. She is also NYSSEA’s liaison to the New York State Department of Taxation. As the liaison, she actively builds relationships with and opens lines of communication between the tax professional community and the State of NY. Ms. Kubey is a member of the National Association of Tax Professionals, the National Society of Accountants, the National Society of Tax Professionals, the Financial Planning Association, the American Payroll Association, and is a non-attorney member of the American Bar Association. Ms. Kubey is a professionally-trained vocalist and is a certified teacher of the Alexander Technique. She is a director of Voices of Ascension, a professional choral ensemble in NYC. Ms. Kubey holds a Bachelor of Fine Arts from Carnegie-Mellon University and a Master of Music (Voice) from The Juilliard School. (Wage & Investment Subgroup Chair)

Mas Kuwana – Mr. Kuwana is a member of Uber’s corporate tax department in San Francisco, CA, where he supports Uber’s tax operations and advises the business on items related to information reporting/withholding. Prior to joining Uber, Mr. Kuwana was a member of Amazon.com’s tax operations team and worked as an executive director at JPMorgan Chase & Co, where he managed U.S. tax operations supporting multiple lines of business. (Small Business/Self-Employed Subgroup)

*Kathleen Lach – Ms. Lach is a Partner resident in Saul Ewing Arnstein & Lehr’s Chicago office. She represents clients before a variety of different tax authorities, including the Internal Revenue Service, the Illinois Department of Revenue, and the Illinois Department of Employment Security. Ms. Lach represents both businesses and individuals in income tax, sales tax, and penalty controversies, and in IRS audits and liability settlement negotiations. She has represented a number of individuals before the IRS on innocent spouse claims and in offshore voluntary disclosure cases. Ms. Lach has had cases pending before the U.S. Tax Court, U.S. District Court, and before IRS and state administrative agencies. (Small Business/Self-Employed Subgroup)

Carol Lew – Carol Lew is a shareholder of Stradling, Yocca, Carlson & Rauth in Newport Beach, CA. She has over 32 years as a tax lawyer with substantial experience with TEB audits and TEB VCAP cases. She served as president of the National Association of Bond Lawyers from 2006-2007, and she served as chair of the ABA Tax-Exempt Financing Committee from 2001-2003. She has experience as bond counsel, underwriter’s counsel, special tax counsel and borrower’s counsel for various kinds of bond issues for state and local government and non-profits for the provision of public infrastructure, housing,
charter schools, performing arts facilities, hospitals, museums and other types of facilities. She served as editor-in-chief of the Federal Taxation of Municipal Bonds from 2000-2001. (Tax Exempt & Government Entities Subgroup)

**Emily Lindsay** – Ms. Lindsay is a former executive of Marriott International, Inc., serving as Vice President, Corporate Accounting Services. She directed a large and diverse team of accounting, tax, systems and business services experts responsible for a wide variety of payroll, business support services, business systems analyses and development, payroll tax services, payroll accounting, and related banking services functions. Ms. Lindsay is a CPA and Chartered Global Management Accountant (CGMA). She serves on the Board of Directors of the American Payroll Association and was on the Board of the Greater Washington Society of CPAs (GWSCPA) and received the 2018 GWSCPA Outstanding Member in Business & Industry award. She has been a past member of three IRS advisory committees (IRSAC, IRPAC, and ETAAC). She currently teaches accounting and MBA courses at American University in Washington, DC, where she has received several outstanding teaching and service awards. (Small Business/Self-Employed Subgroup)

**Charles “Sandy” Macfarlane** – Mr. Macfarlane has 40 years of experience in corporate tax. He is Vice President and General Tax Counsel for Chevron Corporation in San Ramon, CA, where he is responsible for Chevron and its subsidiaries’ worldwide tax affairs. He manages the Corporate Tax Department of 140 professionals and serves as functional tax leader for tax professionals in Chevron’s foreign subsidiaries. Employed with Chevron for the past 35 years, his previous positions included Assistant General Tax Counsel and Tax Compliance Manager. He led the team that designed and implemented transfer pricing documentation. When FIN 48 was issued, he led the group that established Chevron’s process to ensure accurate financial reporting for uncertain tax positions. He managed Chevron’s Tax Compliance group through a major overhaul of its U.S. income tax compliance process, adopting new software, streamlining processes and moving from the September 15 return filing to early July filing. He is a member of Chevron’s Management Committee and the Finance Leadership Committee. Mr. Macfarlane served as Chair of the Tax Legislative Committee for the American Petroleum Institute for 11 years, and he represented Chevron on the tax committees of National Foreign Trade Council, U.S. Council for International Business, American Chemistry Council and Business Round Table. Mr. Macfarlane is past international president of the Tax Executives Institute, where he has been a member for 20 years. He is a member of the American Bar Association Section of Taxation. Mr. Macfarlane holds an A.B. (History) from Brown University, a J.D. from Boston College Law School and an LL.M. (Taxation) from the Boston University School of Law. (Large Business and International Subgroup Chair)

*Kelly Myers* – Mr. Myers is a tax consultant with Myers Consulting Group, LLC, based in Huntsville, Alabama. Mr. Myers primarily provides seminars, tax planning, consulting, and controversy services to clients across the United States which include individuals and large to small accounting firms. He spent 30+ years with the Internal Revenue Service (retired 2017) with the last 20 years working for the Washington, DC, Headquarters as a
Senior Technical Advisor. His IRS experience included official guidance projects, examiner and litigation technical support, and implementing new legislation. He leverages his decades of IRS and public accounting experience to strategically add value to a varied client base. He has developed efficient tax strategies in both preparation and controversy arenas. He has been a guest speaker for numerous CPA and EA continuing education events, IRS Nationwide Tax Forums, national tax associations, and others in both live settings and webinars. Mr. Myers serves on the Federal Tax Committee for the National Society of Accountants (NSA). He has an MBA from the University of Tampa with emphasis in Accounting and Taxation. His BA is from Western Colorado University (f/k/a Western State College) with a double major in Accounting and Business Administration and a minor in Economics. (Small Business/Self-Employed Subgroup)

* Joseph Novak – Mr. Novak is Abbott’s Vice President, Taxes. He was appointed to this role in June 2017. Previously, Mr. Novak had served in Abbott’s corporate tax organization since 2004, in a variety of roles, including leadership positions in the income tax accounting, transfer pricing, M&A, planning and compliance groups. Prior to joining Abbott, he worked for Deloitte. Mr. Novak earned his B.S. in Accountancy from the University of Illinois, Champaign-Urbana (Large Business and International Subgroup)

* Robert “Bob” E. Panoff – Mr. Panoff is a certified tax attorney specializing in representing individual and entity taxpayers in civil and criminal tax litigation matters at all levels of the IRS and in court. He was an adjunct Professor at the University of Miami School of Law in this subject matter from 1981 through 2006. He is a past chair of both The Tax Section and the CLE Committees of the Florida Bar and is a member of the Tax Section's Executive Council. He is also a member and past President of the Greater Miami Tax Institute and a member of the Miami International Tax Group and the South Florida Tax Litigation Association. In 2006, Bob received the Tax Section’s Gerald T. Hart Outstanding Tax Attorney of the Year Award. Bob was previously a member of IRSAC from 2005 through 2007. He was Chair of the IRS South Florida District Compliance Plan Study Group under then District Director Thomas from 1996 through 2000. He was an invitee to the Judicial Conference of the United States Tax Court in 1999, 2003, 2005, 2007, 2009, 2015 and 2018. Bob is one of a small number of tax litigators who have successfully invalidated a tax regulation. See Durbin Paper Stock Co. V. Commissioner, 80 T.C. 252 where two DISC regulations were found to be invalid. He is also the only tax litigator ever to obtain attorney's fees against the Florida Department of Revenue in a corporate income tax case. (Small Business/Self-Employed Subgroup)

Charles Read – Mr. Read is a CPA and the Founder and CEO of Get Payroll in Lewisville, TX, where he has provided full-service payroll and payroll tax services since 1991. Get Payroll helps small to medium-sized businesses across the U.S. with direct deposits, debit card loads, printed checks, payroll deposits, reports and tax filings, year-end Forms W-2 and employer-employee website portals. Mr. Read is an accomplished senior executive and entrepreneur with more than 50 years of financial leadership experience in a broad range of industries, as well as a licensed CPA. In addition, he is also a US Tax Court Non-Attorney Practitioner which enables him to represent clients in the US Tax
Court without being an attorney. He is the author of three e-books: *Starting a New Business: Accounting, Finance, Payroll, and Tax Considerations, Small Business Short Course (Employees Book 1)* and *The Little Black Book of the Beauty Biz, Volume 1*. Mr. Read is an accomplished speaker and has been featured on Fox Business News, Biz TV Texas, New York City Wired, Dallas Innovates and many more. In addition to his executive career, Mr. Read is a decorated United States Marine Corps sergeant, and a combat veteran of the Vietnam War. *(Small Business/Self-Employed Subgroup)*

**Martin Rule** – Mr. Rule is a CPA with over 25 years of experience as a tax and accounting professional. He is a subject matter expert in both tax management and payroll processing with a range of knowledge stemming from employment with public accounting firms, academic institutions, and healthcare institutions. He previously was a Senior Manager with Deloitte, and he also served as the Director of Payroll and Tax at Northwestern University and at Lurie Children’s Hospital. Throughout his career, he has engaged in improving and developing electronic systems and tools for managing federal, state and local employment tax and information reporting. Key to his success is his passion for training others. He was also a part-time lead tax instructor at DePaul University, where he developed and presented lectures for the individual income tax module of the school’s Certificate of Financial Planning Program. Mr. Rule earned his B.S. in Accounting from Northeastern Illinois University and his M.S. in Taxation from Northern Illinois University. *(Wage & Investment Subgroup)*

* **Nancy Ruoff** – Ms. Ruoff is the Manager of Statewide Payroll and Collections for the State of Kansas and maintains responsibility for payroll processing and reporting for all state agencies, including the Executive, Legislative, and Judicial branches of government and seven higher education regent institutions. In addition, she manages the Kansas Setoff and Kansas Treasury Offset Programs. Ms. Ruoff has over 28 years of experience in all aspects of payroll including management of integrated payroll and accounting business applications and upgrades, analysis and application of Federal State and Local regulations, and identification and implementation of system enhancements and efficiencies. Ms. Ruoff is a CPA and participates in the APA Strategic Payroll Leadership Tax Force Government/Public Sector Subcommittee and the National Association of State Comptrollers’ Payroll Information Sharing Group. *(Tax Exempt & Government Entities Subgroup)*

**Jeffrey Schneider** – Mr. Schneider has over 35 years of experience as an enrolled agent and currently is Vice President of SFS Tax & Accounting Services in Stuart, FL. His company handles all areas of tax including taxpayer representation and tax preparation bookkeeping and payroll for multiple types of taxpayers. Prior to joining SFS in 1999, he worked in various corporate taxpayers for 20 years, culminating as a Director of Tax for a major jewelry concern. He is a Fellow of the NAEA National Tax Practice Institute and a Certified Tax Resolution Specialist. He served 4 years as a director for the National Association of Enrolled Agents, two years as a member of NAEA’s National Government Relations Committee. He served two terms as chair of NAEA’s Awards Committee, and one year as chair of the NAEA’s Membership Committee. Mr. Schneider was a founding member of the NAEA Educating America’s Task Force. He was also President of the
Florida Society of Enrolled Agents. He is a national speaker on all things tax, including Circular 230 and ethics. Mr. Schneider earned his B.S. in Finance from College of Staten Island and his Master of Science in Tax from Long Island University. (Small Business/Self-Employed Subgroup)

* Katie Sunderland – Ms. Sunderland is Assistant General Counsel, Tax Law for the Investment Company Institute (ICI), the leading association representing regulated funds globally, including mutual funds, exchange-traded funds (ETFs), closed-end funds, and unit investment trusts (UITs) in the United States, and similar funds offered to investors in jurisdictions worldwide. She has experience with a broad range of tax issues that impact the investment fund community, including managers, investment funds, and investors. At ICI, she primarily works on global tax issues affecting both US and non-US regulated funds, such as treaty entitlement and EU matters (e.g., public country-by-country reporting). She is also involved in Business at OECD’s Business Advisory Group to the Organisation for Economic Co-operation and Development’s (OECD’s) projects on the Common Reporting Standard (CRS), Tax Relief and Compliance Enhancement (TRACE), and the Digital Economy. Prior to joining the ICI, Ms. Sunderland worked extensively with private funds (i.e., hedge funds and private equity) and sovereign wealth clients as an associate with large international law firms. (Large Business and International Subgroup)

Jean Swift – Ms. Swift is a tribal leader in Mashantucket, CT, with diverse experience in business and financial management, administration, and establishing strategic partnerships. She is a Certified Public Accountant in the State of Connecticut and a certified financial counselor. She recently served as Tribal Council Treasurer of the Mashantucket Pequot Tribe, and currently works for the Tribe as a Financial Advisor. (Tax Exempt & Government Entities Subgroup)

Patricia Thompson – Ms. Thompson is a CPA and Tax Partner with Piccerelli, Gilstein & Company, LLP in Providence, RI. She has extensive experience in complex tax transactions including multi-state tax returns, real estate transactions and like-kind exchanges. She focuses on assisting clients with the intricacies of sale transactions to minimize income tax consequences, business and financial consulting and audits with governmental agencies. In addition to directing the firm’s tax department, she has distinguished herself in the accounting profession both at the state and national levels. She is a member of the Rhode Island Society of CPAs, where she previously served on the Board of Directors and held the positions of Secretary, Treasurer, Vice President, and President. At the national level, she served as Chair of the AICPA Tax Executive Committee, which is AICPA’s final authority on policy recommendations relating to national tax legislation, tax administration, and ethical standards. She is currently the Chair of the AICPA Relations with The Bar Committee, which maintains cooperative professional relations with the American Bar Association to identify areas of mutual concern to the professions and seeks to have them addressed through mutual discussion and concurrence. Ms. Thompson earned her B.S. in Accounting from the University of Rhode Island, Master of Science in Taxation from Bryant College and received the
* Kevin Valuet – Mr. Valuet is a Senior Payroll Consultant for PayTech, Inc. He has more than 10 years of payroll experience in financial, educational, and supply chain industries. He is the current President of the Northstar Chapter of the American Payroll Association (Minnesota). Mr. Valuet is an active member of the payroll community and volunteers on the Government Relations Task Force, Strategic Payroll Leadership Task Force, and Certification Item Development Task Force with the American Payroll Association. He holds a bachelor’s degree in accounting from Baker College in Flint, Michigan. (Small Business/Self-Employed Subgroup Chair)

Daniel Welytok – Mr. Welytok has over 30 years of experience as an attorney. He is currently a shareholder in Von Briesen & Roper, S.C., in Milwaukee, WI, where he serves as chair of the Opinion Review Committee reviewing and analyzing numerous opinions on taxable and tax-exempt bond issues, many involving the State of Wisconsin Public Finance Authority. He practices primarily in the areas of taxation, exempt organizations, employee benefits and business law. He also provides a broad range of representation, advising clients on various aspects of nonprofit organization and planning, 501(c) operational issues and compensation practices, income reporting and recognition issues. He represents clients before the DOL, the IRS and state departments of revenue in obtaining and maintaining tax-exempt and nonprofit status, as well as audits and tax controversies. (Tax Exempt & Government Entities Subgroup)

Mary Jo Werner, CPA, CFF, JD – Ms. Werner is a partner in Wipfli’s tax services and valuation, forensics and litigation services groups. She specializes in litigation support for law firms and assists in fraud and forensic investigations. She is certified in financial forensics by the AICPA. She prides herself on establishing long-term, solid relationships with her clients and works very hard to help them achieve their goals. Ms. Werner’s professional memberships and activities include AICPA, American Bar Association, WICPA and Wisconsin Bar Association. She currently serves on the Wisconsin State Bar Tax Board of Directors and is a past member of the IRS Taxpayer Advocacy Panel. (Small Business/Self-Employed Subgroup)

Charles Yovino – Mr. Yovino is currently President of Global HR GRC in Atlanta, GA and provides litigation support on retirement plan cases and also writes about HR governance, risk management and compliance. Prior to that he spent 28 years at PricewaterhouseCoopers and was head of the Atlanta HR consulting practice and a national leader of the HR tax, accounting and regulatory practice. He spent the first six years of his career working at a Washington, DC law firm and then for the IRS in Employee Plans Technical. He has worked in all aspects of benefits, including plan design, plan compliance, determination letter requests, VCP applications and working with clients on IRS audits. (Tax Exempt & Government Entities Subgroup)

* New Members