

AUBURN UNIVERSITY
2017 TAX PROFESSIONAL SEMINAR: Instructor Team

ALABAMA INSTRUCTORS:

Christopher Bird, EA, CFP:

Chris Bird has been in the financial business for over 30 years. He started his career with a degree in Accounting and a minor in Business Administration. He also holds the Certified Financial Planner designation (CFP). Chris was a Senior IRS agent for 16 years. He began conducting courses after leaving the IRS and started his own company, Chris Bird Seminars, Inc. Chris went on to conduct over 125 seminars a year on accounting, financial planning, wealth building, residential rental property ownership, and tax strategies for the real estate and financial industries nationwide. He has presented his widely acclaimed courses multiple times at NAR conventions and most recently presented at Howard Brinton's StarPower™ Conference in Orlando, FL. Chris was an adjunct instructor at the University of Illinois in tax law for 20 years. He is a Senior CRS Instructor and a Senior Faculty Instructor for the Realtors Land Institute. And he also teaches at all the Illinois tax seminars currently using the *National Income Tax Workbook* also used in the Auburn University programs. Chris has a unique way of making a tough subject (taxation instruction) entertaining and enlightening for our audience.

Merry Brodie, EA:

Since 1990, Merry Brodie has served the tax and accounting needs of small businesses as owner and principal of Brodie Accounting Services. For more than 20 years, Merry served as CEO and President of Tax Doctor, Inc., which owned multiple Jackson Hewitt Tax Service franchises. At its peak, Merry managed 24 offices and a staff of 160. In 2012, Merry and her husband successfully sold the franchises and became partners in Tax Audit Guardian, a group of professionals who assist troubled taxpayers. As an Enrolled Agent, Merry is licensed by the IRS to represent clients in all 50 states. She holds an accounting degree from Georgia State University and is a regular guest on Sunday mornings on the Ilyce Glink radio program broadcast on WSB-750 AM, Atlanta, answering tax questions from callers. She is a member of the Gwinnett Chamber of Commerce, past officer and director of the Atlanta Track Club, Georgia Association of Enrolled Agents and the National Advisory Council of Jackson Hewitt Tax Service. Merry lives in Atlanta with her husband, Bill Nemeth, and has three children and five grandchildren.

Michael Ferguson, CPA, CFP:

Michael Ferguson has over twenty five years' experience in accounting, tax, and financial planning for businesses and individuals. Currently his practice is located in Guntersville, Alabama, where he works with clients from all over the country. He has owned a firm in metro Atlanta, and returned to northeast Alabama in 1987. In 2013, he formed a new partnership with his firm in Guntersville and opened the Gateway Group, LLC. He has been an Auburn University Tax instructor for the past nine years. He holds a Bachelor of Professional Accountancy degree from Mississippi State University and served as a commissioned officer in the U S Army.

Nora J. Huffman, IRS, Senior Stakeholder Liaison:

Nora began her career with the Internal Revenue Service in the Examination Support and Processing Division. She later became an Internal Revenue Agent where she had the opportunity to examine a variety of business and personal income tax returns. In 2006, Nora joined what is now the Communications and Stakeholder Outreach Division of the IRS as a Stakeholder Liaison providing outreach to the tax practitioner and small business community. Nora has a Bachelor of Business Administration Degree in Management from the University of Montevallo, and a Master's Degree in Public Administration from the University of Alabama in Birmingham.

Regina Malisham, IRS, Stakeholder Liaison:

Regina began her career with the Internal Revenue Service in 1991 as a Revenue Officer. In 2010, she joined the Communications & Stakeholder Outreach Division as a Stakeholder Liaison. She collaborates with tax professional organizations, small business, and industry associations to provide tax education and information for their members. Regina has a Bachelor of Science Degree in Accounting from Alabama A&M University.

Kelly H. Myers, Senior Technical Advisor, Washington, DC

Kelly Myers has over 35 years of tax experience and specific subject matter expertise to assist tax professionals. He developed efficient tax strategies in both preparation and controversy arenas. He has over 20 years of IRS Headquarters experience along with public accounting experience. Kelly developed technical material for IRS staff; both formal and informal training for Service-wide implementation impacting 7,000-8,000 examiners. He has been a guest speaker for State CPA meetings, National Business Aircraft Association, IRS Nationwide Tax Forums, and others. He has an MBA from the University of Tampa with emphasis in Accounting and Taxation. His BA is from Western State College with a double major in Accounting and Business Administration with a minor in Economics. He currently lives in Huntsville, Alabama.

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William Nemeth, EA:

Bill Nemeth is the immediate past president of the Georgia Association of Enrolled Agents (GAEA) and a founding member of the GAEA Education Foundation. He is currently the GAEA Membership Chair as well as the Education Chair. He is active at the National Level as well (Affiliate Council Member of NAEA). He holds a bachelor's degree (Kettering Institute) and master's degree (MIT) in Mechanical Engineering and an MBA in Marketing (Wayne State University). Bill and his wife Merry Brodie, Enrolled Agent, recently sold their franchise tax business which prepares up to 12,000 returns per year. With his strong focus on education, he creates and presents tax seminars at local Enrolled Agent chapter meetings. He promotes Enrolled Agents through frequent appearances on a major Atlanta radio talk show and tax seminars to numerous CDC Campuses throughout the Atlanta area. He has been interviewed by WSB TV, Atlanta, for several stories on the fiscal cliff and tax identity theft. Bloomberg has cited some of his tax articles. He worked with Prometric as an SME (Tax Subject Matter Expert) on the development of the IRS Preparer Gateway test, the RTRP (Registered Tax Return Preparer) exam. Bill and Merry are founding partners in Tax Audit Guardian, a new Atlanta business venture specializing in assisting troubled tax clients in representation, audit, and tax court matters.

Ronald W. Stokes, CPA, PFS, CGMA:

Ron is a CPA from Birmingham, Alabama, with 30 years of experience in individual and business taxation and consulting. He combines his experience, training and a personalized approach to help establish and achieve financial goals for his clients. He is also an adjunct professor of accounting at the University of Alabama at Birmingham, teaching in both the undergraduate and master of accountancy programs. Ron graduated from Samford University with a degree in accounting and also holds a Master of Accounting degree from the University of Alabama at Birmingham.

Beanna J. Whitlock, EA: (Bessemer and Auburn only and Nevada instructor)

Beanna is an Enrolled Agent in private practice, Whitlock Tax Service, LLC, located in Reno, NV. She has been a tax law instructor for more than 35 years, with emphasis on Limited Liability Company, Ethics, and Professional Conduct presentations. Beanna has taught tax professionals across the country including her instruction assignments for Auburn University. She is a faculty member of the Society of Certified Senior Advisors and the National Center for Professional Education. She has testified before Congress, Treasury and the IRS Oversight Board and served on the IRS Information Reporting Program Advisory Committee as well as the IRS Commissioner's Advisory Council (CAG). She served as the IRS Director of National Public Liaison for Commissioner Mark Everson and is a recipient of the Commissioner's Award for Excellence of Service. She has been honored by *Accounting Today* as one of the 100 Most Influential in Accounting for an unprecedented 7 years. Known for her fierce defense of the tax professional community, Beanna is frequently consulted by accounting and tax publications regarding issues concerning the tax professional community.

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Bill Klump, CPA:

Bill is a CPA and president of Klump & Blandford, PSC, a CPA firm located in Louisville, Kentucky. His practice is primarily devoted to federal and Kentucky income taxes. He has been an instructor for the income tax seminars sponsored by the University of Kentucky since 1997. In past years, he has been an instructor for income tax seminars in Louisiana and Pennsylvania. Bill was an instructor in Arkansas in 2013 for Auburn University. For many years, Bill was a member of the Board of Directors of the Land Grant University Tax Education Foundation Inc., the provider of the *National Income Tax Workbook*. He has participated in the editing sessions for the *National Income Tax Workbook* for more than 10 years. Bill reviewed the chapters on "New Legislation" and "New Repair Regulations" for the 2014 and 2015 *National Income Tax Workbook*.

Gregory Metcalf: IRS, Senior Stakeholder Liaison, Stakeholder Liaison Field, Mid-South Area

Gregory began his career with the IRS as a Revenue Agent in Pine Bluff, Arkansas in 1987. His career includes assignments as Section Chief of Planning & Measurement Staff and as a Planning & Measurement Staff Coordinator (TEFRA, Return Preparer, Employee/Independent Contractor). He was selected as a Senior Stakeholder Liaison in June 2001. Gregory received his bachelor's degree in accounting from the University of Arkansas at Little Rock in 1983.

FLORIDA INSTRUCTORS:

Michael Ferguson, CPA, CFP:

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LOUISIANA INSTRUCTORS:

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• **Claire Twardy, Auburn University Tax Seminar Coordinator:**

Claire began working at Auburn University in 2006 at the Office of Professional and Continuing Education. In 2007, she was assigned the Auburn University Accounting & Tax Training Institute programs. She coordinates all tax and accounting seminars in Alabama, Arkansas, Georgia, and Nevada. Other duties include acting as the Director of the Advanced Placement Summer Institute training for AP teachers each year on the Auburn University campus. Claire also coordinates other conference events on campus and around the state. She is a member of the 1999 class of Leadership Alabama. She is a graduate of the University of Georgia with a Bachelor of Fine Arts in Graphic Design. She and her husband, Joe, live in Auburn, Alabama, and have two daughters that are graduates of the university. WAR EAGLE - GO DAWGS!