

AUBURN UNIVERSITY
2019 TAX PROFESSIONAL SEMINAR: Instructor Team

Christopher Bird, EA, CFP: Alabama, Arkansas, Georgia, Mississippi, Instructor

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. Chris was an adjunct instructor at the University of Illinois in tax law for over 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.

Michael Ferguson, CPA, CFP: Alabama, Arkansas, Georgia, Louisiana, Mississippi, Instructor

Michael Ferguson has over thirty 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 owned a firm in metro Atlanta early in his career 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 eleven 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: Alabama Instructor

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.

Joel C. Jones, CPA: Alabama, Georgia, Instructor

Joel is a shareholder at Kassouf & Co. in the Business Services group and works in the Auburn, Alabama office. Joel received his Bachelor of Science degree from the University of Alabama at Birmingham in 1997. He is a member of the American Institute of Certified Public Accountants, the Alabama Society of Certified Public Accountants and the Institute of Internal Auditors. He is also a member of the National Association of Certified Valuation Analysts and a member of the Valuation and Forensic Services Section of the American Institute of Certified Public Accountants. Joel is a Certified Internal Auditor (CIA) and a Certified Valuation Analyst (CVA), and he holds the Accredited in Business Valuation (ABV), Certified in Financial Forensics (CFF) and Chartered Global Management Accountant (CGMA) designations from the AICPA. Joel provides tax and consulting services to businesses and individuals operating in wholesale distribution, retail sales, real estate development, professional services and investments. He specializes in family owned businesses, partnership and corporate taxation, multi-state taxation, not for profits and works in the firm's business valuation area. He frequently teaches continuing education classes for staff and clients of Kassouf & Co., P.C.

Regina Malisham, IRS, Stakeholder Liaison: Alabama Instructor

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, MBA, Tax Consultant: Alabama, Arkansas, Georgia, Louisiana, Mississippi, Instructor

Kelly Myers is a consultant with Myers Consulting Group, LLC providing seminars, tax planning, consulting, and controversy services to clients across the United States. Kelly has spoken nationally both as a consultant and during his 30+ year career with the IRS (retired 2017). Kelly spent his last 20 years of his IRS career working for the Washington, DC Headquarters as a Senior Technical Advisor. He has over 38 years of tax experience and specific subject matter expertise to assist tax professionals. He has developed efficient tax

strategies in both preparation and controversy arenas. Kelly has developed technical material for IRS staff; both formal and informal training for Service-wide implementation impacting thousands of 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 resides in Huntsville, Alabama.

Dee Rasberry, CPA: Alabama, Mississippi, Louisiana Instructor

Ms. Rasberry retired from the IRS in 2017, as technical advisor with internal examiners and external tax professionals to provide guidance for farming, construction and real estate issues. She joined the IRS in 1987 as a revenue agent in Hattiesburg, MS. She has held technical positions in the Examination Division with large case exam and promoter investigations. Her leadership positions have included classroom instructor and technical advisor. Ms. Rasberry holds a bachelor's degree in accounting from the University of Southern Mississippi in Hattiesburg. She also is a licensed CPA and a member of the MSCPA.

Aaron H. Steele Sr., IRS, Senior Tax Specialist (New Orleans, LA): Mississippi, Louisiana instructor

Aaron began his career with the Internal Revenue Service in 1991. Aaron has held numerous positions such as Revenue Agent, Reviewer and Earn Income Tax Credit Coordinator to name a few. In 2005, Aaron transitioned into the position of Senior Stakeholder Liaison in Communication Stakeholder Outreach. Aaron currently participates in the Louisiana and the Mississippi Practitioner Liaison Meetings, which are held semi-annually. The Practitioner Liaison Meetings provide an opportunity for practitioners to voice their concern with the Tax Administration System and for IRS Executives to inform practitioners of changes within the IRS. Aaron has a Bachelor of Science in Accounting from Xavier University of Louisiana.

Ronald W. Stokes, CPA, PFS, CGMA: Alabama, Mississippi, Georgia instructor

Ron is a CPA from Birmingham, Alabama, with over 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 was 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 holds a Master of Accounting degree from the University of Alabama at Birmingham.

Auburn University Accounting & Tax Training Institute Staff:

• **Claire Twardy, Assistant Director-Outreach Programs, 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!

• **Alan Spencer, Program Developer, Auburn University Tax Seminar Coordinator:**

Alan Spencer joined the Auburn University Office of Professional and Continuing Education in 2016. He received his Bachelor's degree in English from Alabama A&M University. Alan worked as an executive, in the non-profit sector, bringing over 12 years of experience in development planning, public relations, marketing, public speaking, administration, communications, fund raising and customer service. He now serves as a Program Developer for Conference and Event services.