

# 2018 NAEA

## NATIONAL CONFERENCE

### Instructor Biographies

**Frank Agostino, JD**

**Aaron Blau, EA, CPA**

**LG Brooks, EA**

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**Claudia Hill, EA, MBA**

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**Robert McKenzie, EA, JD**

**Kathy Morgan, EA, USTCP**

**Alan Pinck, EA**

**Laura Strombom, EA**

**Aaron B. Whitaker Jr., EA**

**Frank Agostino, JD**, is the founder and president of Agostino & Associates. Prior to entering private practice, he was both an attorney with IRS and a Special Assistant United States Attorney, where he primarily prosecuted criminal tax cases. Frank serves on the Advisory Board of the *Journal of Tax Practice and Procedure* and is also the President of the Taxpayers Assistance Corp. which provides tax and legal advice to low income taxpayers. Frank is a National Tax Practice Institute™ (NTPI®) Level 1 and Graduate Level in Representation instructor.

**Aaron Blau, EA, CPA**, is an Arizona-based certified public accountant and enrolled agent whose practice focuses on small, closely held companies and individual income tax preparation. Aaron is an active member of the Arizona Society of Enrolled Agents and chairs the Central Arizona Chapter. Additionally, he teaches QuickBooks to small business owners and volunteers with the Arizona State University Alumni Association. Aaron is an NPTI Level 2 instructor.

**LG Brooks, EA**, is a senior consultant at The Tax Practice, Inc., a firm in Dallas, Texas specializing in tax representation and pre-tax court litigation support services. A popular speaker, he presents to numerous tax and accounting societies and has addressed attendees at several annual IRS Tax Forums. He is an NTPI Fellow, class of 2000, and has served as an instructor and/or discussion leader since 2001. LG is an NTPI Level 1 and Level 3 instructor.

**Salvatore P. Candela, EA**, is the owner and founder of The Tax Advocate Group, based in New York, which focuses on tax controversy resolution. His firm represents taxpayers before all administrative levels of IRS and is committed to helping taxpayers resolve their IRS problems. Sal is an NTPI Fellow and an NTPI Level 2, Level 3, and Graduate Level in Representation instructor.

**Frank Degen, EA, USTCP**, is an NTPI Fellow and a non-attorney admitted to practice before the United States Tax Court. Frank practices as a sole proprietor in Setauket, New York. He has twice served as NAEA President and as Chair of IRSAC, the IRS Advisory Council. Frank is an NTPI Level 3, Graduate Level in Representation, and Tax Preparation Issues instructor.

**Marc Dombrowski, EA**, is president of Tax Help Associates, Inc. with seven offices on the East Coast. He has specialized in IRS and state collection/representation issues since 1994. Marc has considerable experience in federal/state payment plans, trust fund recovery penalty cases, offers in compromise, lien priority law, innocent spouse, and penalty abatement cases. Marc is a proud NTPI Fellow and is an NTPI Level 2 instructor and discussion leader.

**Thomas A. Gorczynski, EA, USTCP**, is a Phoenix-based tax professional whose firm specializes in tax preparation and planning for individuals and small businesses, international tax compliance, and tax representation. A non-attorney admitted to practice before the United States Tax Court, Tom is also a frequent speaker on tax law and procedure. Tom is an NTPI Fellow and instructor of NTPI Level 1, the Graduate Level in Representation, and Tax Preparation Issues.

**Robert (Bert) Hartmann, EA**, became an EA in 1989 and is an NTPI Fellow. Bert is a founding member of the Northern Nevada Society of Enrolled Agents, where he has served as president, vice president, treasurer, and is an annual tax update speaker. His practice is located in Sparks, Nevada and employs two other EAs. Bert serves as an NTPI Level 2 instructor and has been a Level 2 discussion leader for nearly fifteen years.

**Claudia Hill, EA, MBA**, is a nationally recognized tax professional and frequent lecturer on taxation of individuals and representation before IRS. She is Editor-in-Chief of the Wolters Kluwer, (formerly CCH) *Journal of Tax Practice & Procedure*, co-author of *CCH Expert Treatise Tax Practice & Procedure*, a founding partner of Tax Genius Learning, and a frequent presenter for both audio and in-person CPE seminars nationwide. She is an NTPI Fellow and an instructor of NTPI Level 1, Level 3, the Graduate Level in Representation, and Tax Preparation Issues.

**Kevin C. Huston, EA, USTCP**, is the president of Blue Ridge Tax Advisors Inc., in Asheville, North Carolina. He has authored several tax and financial articles for professional journals. Kevin is a non-attorney admitted to practice before the United States Tax Court and presented NAEA's 2016 National Conference plenary. Kevin is an NTPI Fellow and is teaching this year in NTPI Level 1, the Graduate Level in Representation, and Tax Preparation Issues.

**Lisa Ihm, EA**, became an enrolled agent in 1986. Lisa teaches seminars nationwide and has spoken in 47 states about a wide array of tax topics ranging from basic individual issues to partnership/corporation and estate/trust issues and is quickly becoming the go-to expert for the Tax Cuts and Jobs Act. She works and lives in Coronado, California. Lisa is an instructor in the Tax Preparation Issues track.

**Clarice Landreth, EA**, is the Quality Assurance Analyst at Omni Financial in Broomfield, Colorado. Clarice has over 15 years of experience representing taxpayers before IRS and state taxing authorities. She is on the Board of Directors of the Colorado Society of Enrolled Agents and is a NTPI Planning Committee member. Clarice became an NTPI Fellow in 2013 and is an NTPI Level 1, Level 2, and Level 3 instructor. She also serves as a Level 2 discussion leader.

**Howard Levy, JD**, is a former IRS trial attorney. Based in Cincinnati, Ohio, Howard is a partner in the law firm of Voorhees & Levy, LLC. Howard's expertise centers on IRS collection and examination problems, tax court litigation, trust fund investigations, and the use of bankruptcy as a method of resolving IRS problems. He is an NTPI Level 1 and Level 3 instructor.

**Mary Beth Lougen, EA, USTCP** has over thirty years of income tax experience. Having worked and lived in both the United States and Canada, Beth opened American Expat Tax Services to make quality expat tax preparation available to everyone. Previously she created training in US tax theory and software and provided support by researching and interpreting tax laws, tax treaties, and regulations. Beth is a proud NTPI Fellow and Graduate Level in Representation and Tax Preparation Issues instructor.

**Robert McKenzie, EA, JD**, is a partner of Saul Ewing Arnstein & Lehr LLP of Chicago, Illinois. Prior to entering private practice, Robert was employed by the IRS Collection Division. He served as a member of the IRS Advisory Council (IRSAC), was Vice Chair Professional Services of the ABA Tax Section, and Dean of the National Tax Practice Institute. Bob is an NTPI Level 3 and Graduate Level in Representation instructor.

**Kathy Morgan, EA, USTCP**, just completed her 25th year with H&R Block. Her work has been published by several tax research companies, including Parker Tax Publishing and TaxConnections.com. She also speaks and instructs on a wide variety of tax issues. Through her company, Puzzled By Taxes, she offers tax preparation and representation services. Kathy is an NTPI Fellow and is pleased to make her NAEA National Conference debut as a Level 2 instructor.

**Alan Pinck, EA**, is the NAEA Education Committee Chair, past Education Foundation Trustee, and has previously held board positions in CSEA. Alan teaches at the CSEA Super Seminars and teaches a Part 2 SEE preparation class. His practice in the San Francisco Bay Area specializes in personal and business tax return preparation as well as audit representation. Alan serves as an NTPI Level 1, Level 2, and the Graduate Level in Representation instructor.

**Laura Strombom, EA**, became an EA in 2000 and owns All About the Numbers in Stockton, California. She gained extensive bookkeeping and accounting experience prior to sitting for the SEE. Laura became an NTPI Fellow in 2010 and is excited to teach at her first NAEA National Conference. Laura will be teaching in Level 1 and the Tax Preparation Issues track.

**Aaron B. Whitaker Jr., EA**, retired from IRS as an Associate Chief of Appeals in 2006. While with the IRS, he was an instructor of multiple technical and managerial courses. He practices in Belleair Bluffs, Florida and specializes in representation issues before IRS. Aaron is a past member of the NAEA Education and Government Relations Committees and is both a Level 2 discussion leader and instructor.