

2016 Fall Tax Seminar Summary and Speaker Profiles

Personal Income Tax Updates - Donald E. Bianchi, CPA or David A. Braden, CPA

The presentation will describe any changes to the Pennsylvania personal income tax law that were previously enacted, a review of the forms and instructions changes for 2016, and a review of miscellaneous issues affecting PA personal income tax and tax professionals.

Corporation Tax Updates - Jeffrey A. Creveling, Valerie Greene or Glenwood Hoskin, Jr.

This presentation will provide a review of tax changes, helpful tips on completing forms and information about the CNI affiliate tax addback and credit.

Business Tax System – Statement of Account - Adria Senft, Torrence Miller or Crystal Antley

This presentation will demonstrate the new electronic statement of account.

Pass Through Business Updates - Jane McCurdy, CPA or Christopher Wilsbach

Learn more about pass through entities including a review of common errors on pass through entity and shareholder / partner returns, along with clarification of some misconceptions about Pennsylvania rules and regulations. The presentation will also cover current/recent judicial and legislative updates relating to pass through entities and their owners.

Sales Tax Updates - Jane McCurdy, CPA or Christopher Wilsbach

The presentation will review recent changes to the Pennsylvania sales tax law and other issues affecting PA sales tax and tax professionals.

Collections and Taxpayer Service Updates - Tony Bupp, Denise Pickup, Debra Saul or Rocco Sivillo

The presentation will provide an overview of the Departments Collections and Taxpayer Service area, explain general compliance processes, common issues and review other miscellaneous issues affecting individuals and tax professionals.

SPEAKER PROFILES

Crystal Y. Antley

Crystal is a Senior Tax System Operation Specialist with the Department of Revenue's Bureau of Process Reinvention Innovation & Strategic Management (PRISM). She is responsible for training and development activities for the Department's Business Tax System, which involves determining the most effective way to develop and present procedural and system training for staff Department-wide.

Crystal has worked for the Department for 24 years and has held various positions such as Tax Account Collections Supervisor and Taxpayer Program Development Specialist. She has a Bachelor's of Arts in Accounting from Clark Atlanta University.

Donald Bianchi, CPA,

Don is the Director of the Taxpayer Services and Information Center for the Commonwealth of Pennsylvania Department of Revenue. He is responsible for the oversight of the department's telephone unit which responds to telephone and email inquiries on personal income tax, corporation tax, sales tax, employer withholding tax and the property tax rent rebate program.

Don's commonwealth career began in 1993 as an Auditor with the State Treasurer's Office. In 2005, he joined the PA Department of Revenue, Bureau of Individual Taxes, where he was the Pipeline Manager of the Personal Income Tax and Property Tax Rent Rebate processing areas until his promotion to Taxation Manager in the Bureau of Motor and Alternative Fuels Taxes in 2012. In 2014, he was promoted to the position of Director for the Taxpayer Services and Information Center.

He graduated from West Virginia University with a degree in Business.

David A. Braden, CPA,

David is the Assistant to the Director for the Bureau of Individual Taxes for the Commonwealth of Pennsylvania Department of Revenue. He is responsible for: establishing policies and procedures for the audit and review of Personal Income Tax returns; directing the form and booklet program for Personal Income Tax; speaking at tax seminars as the Personal Income Tax speaker for the Department of Revenue's Fall Tax Seminar series; and, interpreting tax laws, rules, regulations, policies and procedures for attorneys, accountants, and taxpayers concerning Personal Income Tax. He reports to the Director of the Bureau of Individual Taxes, Meggan Swisher.

David has his Bachelor's Degree in Business Economics with a concentration in Accounting from the University of Pittsburgh at Johnstown and has been a Certified Public Accountant since 1988. Employed with the Department of Revenue since 2004 as the Assistant to the Director, David was previously employed as an Audit Manager, Special Assistant to the Deputy Treasurer, and Assistant Deputy Treasurer with the Pennsylvania Treasury Department for fourteen years. Prior to his employment with the Commonwealth, David was employed in Public Accounting firms in the Pittsburgh area for seven years.

Anthony Bupp

Tony is a Tax Account Collections Supervisor with the Department of Revenue's Collections and Taxpayer Services, Harrisburg Call Center. He is involved with ensuring his agents are

bringing taxpayers into compliance for Personal Income Tax, Corporate Taxes, Sales and Employer Withholding Taxes. This unit is responsible for the collection of balances owed to the Commonwealth as well as non-filed returns. He has helped establish policies and procedures that his unit currently utilizes to achieve compliance.

Tony joined the Department of Revenue in 2007. Prior to joining the Department, he worked three years with the Department of Corrections.

He has a Bachelor of Science Degree in Criminal Justice from The Pennsylvania State University and is working towards a Master's Degree in Applied History from Shippensburg University.

Jeff Creveling, CPA

Jeff is the Chief of the Taxing Division in the Bureau of Corporation Taxes and has held this position since 2002. In this capacity, Jeff supervises a staff of 50 professional and clerical employees. Jeff reviews PA and Federal Tax Laws, FASB Pronouncements, court decisions and determines how these affect the calculation of PA corporation taxes. Previously, Jeff worked as a Corporation Taxing Officer within the Department for 7 ½ years, a Training Supervisor and as a Corporation Tax Manager. Jeff also has 6 years private sector experience.

Jeff obtained a Bachelor of Science Degree in Business Administration from Bloomsburg University.

Valerie Greene

Valerie oversees two units of taxing personnel that includes Supervisors and Taxing Officers. She is responsible for coordinating the continuing education and training for the taxing personnel in regard to the examination and desk audits of Corporate Tax Reports. She also resolves problems with tax determinations/re-determinations/resettlements of the largest most complex corporate taxpayers.

As the lead trainer of the Business Tax System (BTS) for the Taxing Division, Valerie works with the Bureau of Business Information Systems in the continuing development of the business rules and programming of the new computer system. She has been tasked with creating new work procedures needed for the many changes that have resulted from changing from the Legacy System to the BTS.

Valerie began her employment with the Department of Revenue in 1981 in the Corporate Tax Data Processing Bureau. In 1986, she commenced her career in the Bureau of Corporation Taxes starting at the front end of the Corp Tax pipeline in the Reports/Payments Application Section. She soon advanced to a Corporate Tax Account Technician in the Accounting Division, working on taxpayer accounts that included: accounts receivable, transfers and assignment of tax credits and refunds and interest payable.

In 1990, Valerie was promoted to a Corporation Tax Officer I in the Taxing Division and quickly advanced to a Corporation Tax Officer II, Training Supervisor and then in 2013, became the newest Corporation Tax Manager. She has 28 years of experience in all areas of the Bureau of Corporation Taxes.

Valerie attended Harrisburg Area Community College where she earned her Accounting credits.

Glenwood Hoskin

Glenwood is the Corporation Tax Supervisor responsible for training of Financial Programs Trainees, Tax Officer 1's, and Taxing Officer 2's. He is responsible for interviewing and hiring taxing officers. Provides training to other divisions as needed and is the Corporate Tax liaison to the Department of the Auditor General.

Employed by the Bureau of Corporation Taxes for 27 years. 21 years as a Corporation Tax Officer and 6 years as a Corporation Tax Supervisor.

Responsible for the direct supervision of 9 Corporation Tax Officers.

Glenwood graduated from Penn State University in 1988 with a Bachelor of Science degree. He majored in Accounting with a minor in Economics.

Jane L. McCurdy, CPA, MT

Jane is a Revenue Fiscal Analyst Supervisor with the Department of Revenue's Pass Through Business Office. She is involved in the enforcement of Pennsylvania's tax requirements for pass through entities, their owners, individuals and beneficiaries. She also is involved with identifying non-filers, under-reporters and abusive and illegal tax avoidance transactions.

Jane is a Certified Public Accountant. She joined the Department of Revenue in 2010. Prior to joining the Department, she had over twelve years of public accounting experience having worked at a local public accounting firm. There she was responsible for managing the compliance for pass through entities, individuals and nonprofits as well as preparing and teaching educational sessions for staff and clients.

She has a Bachelor's of Science Degree in Business Administration from Shippensburg University where she had a dual major of accounting and economics. She also has a Master of Taxation from Villanova University.

Torrence Miller

Torrence is a Senior Tax System Operation Specialist with the Department of Revenue's Bureau of Process Reinvention Innovation & Strategic Management. He is responsible for the review and design of tax processes for the Department of Revenue's modernization effort and serves as a Subject Matter Expert for Taxpayer and Revenue Accounting.

Torrence joined the Department of Revenue in 2005. He has worked for several bureaus including Taxpayer Service and Information Center and Collections and Taxpayer Service before joining the Integrated Tax System Business Operations Office.

He has a Bachelor's Degree from Elizabethtown College in Business Administration. In his free time, Torrence enjoys spending time with his family and is an avid sports fan.

William T. Orasin

William is the District Administrator for the Department of Revenue's Collections and Taxpayer Assistance Scranton District Office. He is responsible for planning, organizing and directing enforcement collections agents engaged in the investigations of delinquent taxpayers. He is also responsible for staff that provides customer service for taxpayers within a seven county area.

William joined the Department of Revenue in the 1980's and was a Revenue Enforcement Collection Agent prior to serving as a District Administrator. He became a District Administrator in 2014 and holds a Bachelor of Science degree in Accounting from the University of Scranton.

Denise M. Pickup

Denise serves as the District Administrator for the Johnstown District Office of the Department of Revenue, Bureau of Collections and Taxpayer Services. Denise's office is responsible for the collection of Corporate, Sales, Employer, Personal Income Tax and Inheritance Tax, as well as customer service for an eleven county area.

Denise has been with the Department of Revenue since 2002. She has held numerous positions with the Department, serves on various committees and is currently a trainer for the new "Business Tax System" application.

Debra J. Saul

Debbie is the District Administrator for the Bethlehem District Office of the Department of Revenue, Bureau of Collections and Taxpayer Services. She oversees the day to day operations, which involves the collection of Sales, Employer, Corporate, Inheritance, Personal Income and other miscellaneous taxes, as well as providing customer service for a four county area.

Debbie joined the Department of Revenue in 1999 as a Revenue Enforcement Collection Agent, serving on various committees. She became a District Administrator in 2012 and is currently an Act 46/Act 52 Enforcement Trainer. Prior to joining the Department she worked 5 years as a legislative aide for the House of Representatives and 10 years in the banking industry.

Adria Senft

Adria is the Chief of the Strategic Planning and Performance Division in the Department of Revenue's Bureau of Process Reinvention, Innovation and Strategic Management (PRISM). Adria's division is responsible for the development, maintenance and implementation of the Department's strategic plan and for the development and monitoring of the Department's performance measures.

Adria began her career with the Department of Revenue in 2001 in the Bureau of Human Resources where she was responsible for training and employee development activities Department-wide. In 2010, she transitioned from Human Resources to serve as the Training Lead on the Department's Business Tax System implementation.

Adria has a Bachelor's Degree from Shippensburg University in Psychology and a Master's Degree from St. Francis University in Human Resource Management. She also is certified by the HR Certification Institute as a Professional in Human Resources (PHR).

Rocco P. Sivillo, MBA

Rocco serves as the Assistant Area Operations Director for the Central-West Region of the Department of Revenue, Bureau of Collections and Taxpayer Service. He is involved with the collection of Sales, Employer, Corporate, Personal Income and Inheritance Tax. He is also engaged in the services that the seven Central-West Area district offices provide to the taxpayers in their respective jurisdictions.

Rocco holds a MBA degree and joined the Department of Revenue in 1998. Prior to joining the Department, he held various accounting positions over a 20 year span in the private sector. His final position as a Service Accounting Manager was with a company that is the world leader in providing sterilization products and service.

He holds Bachelor of Science Degree's in Accounting and Management from Gannon University and also earned a Master in Business Administration from the same institution.

Joe Stagliano

Joe has been the Assistant Area Operations Director for the Eastern Region since 2013. He was previously the District Administrator of the Northeast Philadelphia District Office and before that he was the Inheritance Tax Supervisor in the Philadelphia Inheritance Tax Office. He has over 20 years of experience with the Department of Revenue.

Prior to working for the Pa Department of Revenue, Joe has over 20 years of Hospital Administration Experience including 5 years as Controller for the Frankford Healthcare System. He has a BS degree in Business from LaSalle University and an MBA in Economics from Drexel University

Matthew Willis

Matthew has been the District Administrator of the PA Department of Revenue's Norristown District Office since 2014. He was previously the District Administrator of the Reading District Office and a Tax Account Collections Technician in the Chester District Office where he focused on Inheritance Tax.

Prior to working for the PA Department of Revenue, Matthew held several state government positions in constituent services. He has a Bachelor of Arts degree in History from Hampden-Sydney College in Virginia.

Christopher Wilsbach

Chris is a Revenue Fiscal Analyst II with the Department of Revenue's Pass Through Business Office. Chris is involved in the enforcement of Pennsylvania's tax requirements for pass through entities, their owners, individuals and beneficiaries. He also is involved with identifying non-filers, under-reporters and abusive and illegal tax avoidance transactions.

Chris began working with the Department of Revenue in 2015. Prior to working in the Department, he worked as a consultant for six years in the Pennsylvania sales tax industry. He constructed refund and reassessment claims for Fortune 500 companies.

He has a Bachelor's Degree from Temple University in Business Management. He is also pursuing the Certified Public Accountant designation.