DELAWARE

Christie Meaders

Christie is currently the Tax Examiner & Investigation Manager for the office of Business and Personal Tax Processing. She has been with the State of Delaware for 12 years. Christie graduated from Goldey-Beacom with a Bachelor's Degree in Accounting.

Holly Reynolds

Holly Reynolds is currently the Tax Examination & Investigations Manager for the Field Operations Bureau and manages the Georgetown and Dover Field offices. In this position, Holly manages the Fraud Team to assist the public in dealing with Identity Theft.

Holly is a native of Delaware and holds a bachelor's degree in Accounting from Wilmington University. Holly has been with the Division for 20 years starting in 1999 as an Accounting Specialist working in public service, promoted to Tax Auditor I in 2000, and then promoted in 2001 to Tax Auditor II working with various areas of taxation including Personal, Withholding, Corporate, Gross Receipts, Licensing, and most recently Alcohol Tax.

Eliott Johns

Eliott Johns is the Corporate Audit Manager in the Office of Business and Personal Tax Enforcement at the Delaware Division of Revenue. He holds a BS Degree in Business Administration/Finance from the University of Delaware and has been an employed for over 31 years with the Delaware Division of Revenue.

Steve Considine

Steve Considine is the Tax Auditor Supervisor for the Corporate Tax Processing Unit in the Office of Business and Personal Tax Enforcement at the Delaware Division of Revenue. He holds a Master of Science in Taxation degree from Goldey-Beacom College and has been employed for over 6 years with the Delaware Division of Revenue.

Richard L. Jezyk

A Tax Audit Supervisor with the Delaware Division of Revenue, Business Audit Bureau in his 40th year. He is married with 3 daughters and 3 grandchildren. He is a graduate of the University of Delaware and works as a high school football and basketball official in Delaware and Maryland.

MARYLAND

Sarah C. Dufresne
Assistant Director
Revenue Administration Division
Comptroller of Maryland
Annapolis, MD

Ms. Dufresne is an Assistant Director for the Revenue Administration Division and also acting Manager of the Legal Section. The Legal Section is responsible for many functions, including estate tax, legal processing, legal correspondence, and forms. The Legal Section responds to tax inquiries, tracks federal and state legislation, and handles all aspects of nonresident sales of property withholding and the review of sales and use tax exemptions, among other duties. The Legal Section is also responsible for forms development.

Ms. Dufresne joined the Comptroller's Office in 2007. Prior to joining the Comptroller's Office, Ms. Dufresne was a judicial law clerk in the Circuit Court for Prince George's County, Maryland. Ms. Dufresne received a Bachelor of Arts degree in Political Science and Journalism from the University of St. Thomas (St. Paul, MN). She received a Juris Doctor degree from William Mitchell College of Law (St. Paul, MN) and was admitted to the Maryland Bar in 2004. She is a member of the Maryland Bar Association.

BELFINT, LYONS & SCHUMAN

JORDON ROSEN, CPA, MST, AEP®

Jordon N. Rosen, CPA, MST, AEP® is a Director and shareholder in the Wilmington, Delaware CPA firm of Belfint, Lyons & Shuman, where he heads the firm's estate and trust practice. Jordon also provides tax consulting and compliance services to the firm's higher net worth clients and business owners. He is a past President of the National Association of Estate Planners and Councils (NAEPC) and has served as president of the Delaware Estate Planning Council and the Chester County, PA Estate Planning Council. Mr. Rosen is also the past Chair of the Tax Committee of the Delaware State Chamber of Commerce, is a past member of the AICPA Trust, Estate and Gift Technical Resource Panel and currently serves on the AICPA Tax Reform Resource Task Force. He is also a member of the editorial board of Thomson Reuters *Focus* publication and serves as chairperson of the Nemours Planned Giving Committee.

Jordon is a licensed CPA in Delaware and Pennsylvania and is a member of the Pennsylvania Institute of CPAs, Delaware Society of CPAs and the AICPA Tax Section. He also holds the designation of Accredited Estate Planner and has been recognized as a 5-Star Wealth Manager by Philadelphia Magazine and Delaware Today.

Mr. Rosen is a frequently sought out speaker both locally and nationally on tax planning and related issues and has published more than 100 articles. He has been a frequent television and radio guest and a past host of *Money Talk* on 1450-WILM. He received his undergraduate degree in Accounting from Temple University (January 1979) and his Master's degree in Taxation from Widener University (1981).

Karly A. Laughin, CPA

Manager – Tax & Small Business

D: 302.573.3926
P: 302.225.0600
klaughlin@belfint.com
www.belfint.com

Karly began her career with the firm as an intern while completing her degree at the University of Delaware and has been with the firm ever since. Karly is a member of the firm's Estate & Trust Section where she specializes in the preparation of tax returns associated with estates, trusts and gifts. Karly also works with a variety of clients providing tax planning, tax preparation, accounting services and QuickBooks maintenance. In addition, she is integral in the preparation of tax returns related to nonprofit organizations.

To stay abreast of important tax law and industry changes, Karly regularly attends the National Association of Estate Planners & Councils annual education conference, the Estate Planning Council of Delaware monthly meetings and Wilmington Tax Group meetings. Karly shares her knowledge by contributing to the firm's tax and small business blog – *A Matter of Tax* and by presenting on estate, trust and tax issues at various local organizations.

Karly assists with the firm's recruiting efforts by attending events at the University of Delaware and assisted with the firm's website upgrade project.

Professional Affiliations

- American Institute of Certified Public Accountants
- Delaware Society of Certified Public Accountants
- Estate Planning Council of Delaware
  - Board Member
- Wilmington Tax Group

Education

- University of Delaware – Bachelor of Science Degree in Accounting & Finance

Awards & Community Service

- 2017 CPA Practice Advisor 40 Under 40 Honoree
- Delaware CarePlan – Treasurer
- Wilmington Flower Market – Volunteer

Valerie C. Middlebrooks, CPA

Principal –
Tax & Small Business

D: 302.573.4129
P: 302.225.0600
vmiddlebrooks@belfint.com
www.belfint.com

Valerie joined the firm in 2005 and then again in 2017 after working for a Top 100 firm in Bethesda, Maryland and a local firm in Delaware. A tax generalist with a strong knowledge base in providing compliance and advisory services to her clients, Valerie works closely with the many experts within the firm to address her clients' varied circumstances. Valerie's experience includes working with large privately-held companies, nonprofits, small businesses, high net worth families, and international businesses (and individuals), and has extensive knowledge leading an engagement team acting as a back-office tax department for a global manufacturer. Her widespread background provides a wealth of insight and expertise for the many issues her clients may face.

Valerie values the personal approach to accounting, preferring to meet face to face as she helps her clients navigate their tax returns, and understand their tax planning, estate planning, and transactions. Her personable nature, in addition to her technical mindset, help her clients align their personal and tax goals.

Within the firm, Valerie's priorities include team building, training, and employee advocacy. She believes individual and firm prosperity begins with teamwork. Along with internal team meeting participation, Valerie is called on to present on various tax topics for organizations such as the Delaware Tax Institute, DSCPA, and Cogency International.

Professional Affiliations

- American Institute of Certified Public Accountants – On Council
- Delaware Society of Certified Public Accountants – Past President

Education

- University of Wisconsin - Bachelor of Business Administration – Accounting and Marketing

Community Service & Awards

- Fund for Women – Treasurer
- Woman to Watch – Delaware Society of Certified Public Accountants 2012

IRS

RICHARD G. FURLONG, JR.
Senior Stakeholder Liaison

Stakeholder Liaison Field
IRS Communications & Liaison Division
267-941-6343
Richard.G.Furlong@irs.gov

Mr. Furlong is a Senior Stakeholder Liaison in the Stakeholder Liaison Field office of the Internal Revenue Service Communications & Liaison Division. Stakeholder Liaison serves as the primary IRS liaison office to tax practitioner organizations throughout the country.

Mr. Furlong coordinates the annual IRS Eastern Pennsylvania ***"Working Together***" Conference. ***"Working Together"*** is a joint effort of public and private tax professionals to enhance the level of communication, education, and trust between these organizations and individuals. Mr. Furlong is also a member of the PA IRS/Practitioner Liaison Council which provides a structured forum for Pennsylvania accounting and tax professional organizations to meet periodically with IRS managers and employees to discuss current IRS program issues.

Each year, Mr. Furlong represents IRS at tax practitioner face-to-face seminars and webinars where he discusses IRS policies and procedures, tax law updates, and emerging areas of tax administration. In June 2018 he began an extended detail assignment to the IRS Tax Reform Implementation Team within C& L Planning and Content Development Branch. During this assignment he is part of a team developing numerous communications and outreach products explaining various provisions of the Tax Cuts and Jobs Act.

Mr. Furlong is a graduate of the University of Pennsylvania Wharton School with a Bachelor of Science degree in Economics.

Stephen Connor
Internal Revenue Service
Communications & Liaison Division
Stakeholder Liaison
267-941-6265
stephen.connor@irs.gov

Stephen Connor is a Stakeholder Liaison with the IRS Communications & Liaison Division in Philadelphia, PA.

Stakeholder Liaison serves as the primary IRS liaison to practitioner and payroll organizations throughout the country.

Additionally, Stephen coordinates and presents a variety of small business topics to professional and non-profit organizations. He also coordinates Small Business Forums in Eastern Pennsylvania. Currently, Steve coordinates the IRS disaster relief efforts in federally declared disaster areas in the Mid-Atlantic and Northeastern states.

Beginning his career with the Internal Revenue Service in 1985, he has been assigned to numerous general program areas concentrating on both technical tax law issues and electronic filing initiatives.

Stephen is a graduate of La Salle University.