



**Eastern PA. Working Together Conference:
“A Joint Effort of Public and Private Tax Professionals”**

May 27, 2026

Agenda

- 7:30 to 8:30** **Registration & Continental Breakfast**
- 8:30 to 9:00** **STATE OF THE IRS & STAKEHOLDER LIAISON’S ROLE IN WORKING WITH TAX PROFESSIONALS**
- *Richard Furlong, Jr., IRS Senior Stakeholder Liaison*
- 9:00 to 9:50** **PRACTITIONERS AND IRS LOOK BACK AT 2026 TAX SEASON AND A LOOK AHEAD TO EXPECTATIONS FOR 2027**
- *Warren Hudak, EA (PSEA; PSTAP)*
 - *Beth Logan, EA (NAEA;PSEA)*
Frank Cellini, EA, NTPI Fellow (PSTAP)
 - *Richard Furlong, Jr., IRS Senior Stakeholder Liaison*
- 9:50 to 10:10** **Morning Break**
- 10:10 to 11:00** **IRS COLLECTION PROGRAMS AND PENALTY ISSUES**
- *Richard Furlong, Jr., IRS Senior Stakeholder Liaison, Moderator*
 - *Phyllis Epstein, Esq. (PA Bar Association)*
 - *Thomas Rath, IRS SB/SE Counsel Attorney Advisor*
- 11:00 to 11:50** **TAXPAYER ADVOCATE SERVICE & TAXPAYER ADVOCACY PANEL**
- *Richard Furlong, Jr., IRS Senior Stakeholder Liaison, Moderator*
 - *Cathleen White, IRS PA Taxpayer Advocate Group Manager*
 - *Yvette Jackson, IRS Senior Program Analyst, Advocacy Efforts*
 - *Mitchell Gerstein, CPA, (PICPA) Taxpayer Advocacy Panel*
- 11:50 to 12:30** **Lunch**

12:30 – 1:40

PA DEPARTMENT OF REVENUE PANEL

- *Russell Hauer, CPA, CFP, (PICPA; PSTAP), Moderator*
- *Don Bianchi, CPA, PA Department of Revenue*
- *Jane McCurdy, CPA, MT, PA Department of Revenue*
- *Alicia Gonse, PA Department of Revenue*

1:40 to 2:10

PENNSYLVANIA LOCAL TAX UPDATES

- *James Newhard, CPA, CGMA (PICPA; PSTAP)*
- *David Caplan, CPA, MBA (PICPA)*

2:10 to 2:30

Afternoon Break (Refreshments)

2:30 to 3:20

**IRS DIGITAL ACCOUNTS and IRS DIGITAL APPS:
ESSENTIAL TOOLS FOR TAX PROFESSIONALS**

- *Richard Furlong, Jr., IRS Senior Stakeholder Liaison*
- *Audience Questions and Observations*

3:20 to 4:35

IRS HOT & EMERGING ISSUES IN TAX ADMINISTRATION

- *Stephen Mankowski, CPA, CGMA (NCCPAP)*
- *Karen Facer-Mee, CPA, GGMA (PICPA; PSTAP)*
- *Richard Furlong, Jr., IRS Senior Stakeholder Liaison*
- *Summary of Audience Questions/Issues/Suggestions to IRS and PA Department of Revenue*

4:35:

Closing Remarks & Adjournment