



# 2018 BOARD OF DIRECTORS ELECTION.

THESE NSTP MEMBERS ARE RUNNING FOR THE 2018 BOARD OF DIRECTORS.

THREE POSITIONS ARE OPEN



## Noel C. Allen, EA NSTP Board of Director Incumbent Metairie, Louisiana

### PERSONAL BIOGRAPHY

Noel is the owner and president of Allen & Assoc., Inc./American Fast Tax in the New Orleans, Louisiana area. His practice, which he co-founded in 1991, consists of preparing tax returns for individuals and small businesses, payroll processing, and IRS representation. He began in the tax industry at a very young age using punch cards at his parents' tax business. He is an Enrolled Agent and will soon be an NTPI fellow.

Noel served as President of the New Orleans chapter of Louisiana Society of Independent Accountants (2004/2005) and attends the NAEA DC fly-in annually to advocate for the tax profession. He had operated three offices, but after the effects of Hurricane Katrina he now has a home office in Covington, LA, where he resides, and one in Metairie, LA. Noel joined NSTP in 2011, inspired by the value he received over other similar organizations. He is looking forward to his time on the Board of Directors so that he may contribute to and learn from NSTP.

Noel was appointed to the NSTP Board of Directors in January, 2014 to serve the final year of the position that was vacated when Nina Tross became Executive Director. Noel wants to continue his service to NSTP and is seeking election for a three-year term on the board.



## Stacey Creighton, EA, Tax Consultant Portland, Oregon

### PLEASE OUTLINE THE SPECIFIC SKILLS YOU BRING OR CONTRIBUTIONS YOU HOPE TO MAKE TO THE NSTP BOARD

I believe that I possess the necessary skills, knowledge, and experience to participate on the Board. I am a dedicated tax professional with a versatile skill set developed through education, experience, and perspective.

I am fluent with business practices and offer advanced skills in operations and logistics. My work history has necessitated that I cultivate my communication and team building skills, and it has seasoned the depth of my customer service abilities.

I also offer advanced skills in accounting and tax preparation. I am enrolled to practice before the IRS and maintain an Oregon tax consultant license.

### BRIEFLY DESCRIBE YOUR RELATIONSHIPS AND ASSOCIATIONS WITH OTHER ORGANIZATIONS

I choose to be an NSTP member because I value the services that are included with membership. I use the hotline. I've attended seminars. I subscribe to the newsletters.

### LIST OTHER RELEVANT EXPERIENCE

- I have my BA and post-bac accounting certificate from Portland State University.
- I was trained and employed by the IRS many years ago.
- I am currently self-employed as a tax professional in Portland, Oregon.
- Please share any other information you feel important for consideration of your application to serve as an NSTP Board member
- I am an authorized e-file provider. Though I was not required, I did participate in the IRS Annual Filing Season Program. I attended the 2013 and 2016 IRS Nationwide Tax Forums. I trained and volunteered with the AARP Tax-Aide Program years ago.

**PERSONAL BIOGRAPHY**

Stacey is a Portland native. Aside from brief absences, she has lived in the Pacific Northwest her entire life. She earned her Bachelor’s degree in Anthropology from Portland State University. Upon graduation, she went to work for a large pharmacy retailer and gained valuable experience doing so. Stacey later enjoyed working for a business broker, but found her term at the IRS to be most rewarding. Drawn to the tax profession, Stacey returned to PSU for her post-baccalaureate accounting certificate. Despite an arduous licensing and certification process, she now practices as a tax professional full-time. Stacey is married with one daughter and enjoys traveling with her family.



**Vanessa Dawson, EA, MBA**  
**Birmingham, Alabama**

**PLEASE OUTLINE THE SPECIFIC SKILLS YOU BRING OR CONTRIBUTIONS YOU HOPE TO MAKE TO THE NSTP BOARD**

I am an articulate business manager driven to succeed and strategic planning, client relationship, management professional and highly skilled in directing teams in delivery of exceptional customer service. I have a reputation for establishing priorities, scheduling, and meeting deadlines through the skillful allocation of human and material resources.

**BRIEFLY DESCRIBE YOUR RELATIONSHIPS AND ASSOCIATIONS WITH OTHER ORGANIZATIONS**

- Life Purpose Institute
- Business & Organizational Coach Certification Cruises Inc.
- World Holdings
- Event Specialist Travel Agent Certification
- National Society of Tax Professional, Membership
- Birmingham Chamber of Commerce, Membership
- List Other Relevant Experience
- Effectively communicated with team members to maintain clearly defined expectations, addressed negative customer feedback immediately, and applied the positive reinforcement method to redirect negative behaviors. Communicated effectively, both orally and writing so that learning occurs in order to motivated and achieve educational objectives.

**PLEASE SHARE ANY OTHER INFORMATION YOU FEEL IMPORTANT FOR CONSIDERATION OF YOUR APPLICATION TO SERVE AS AN NSTP BOARD MEMBER**

I am submitting my application for consideration for committee leadership position within the National Society of Tax Professional Organization. In today's workplace, challenges are increasingly complex. We at Taxx Solutions Services must be flexible and able to manage change effectively in order to prosper. Through electronic venues, face-to-face forums, and workshops, we are striving to deliver informative, accurate, timely, and transparent communication. We are also placing increased emphasis on listening to our customers as we deliver these services and greater receptivity to programmatic input from the community in which we serve.

Most importantly, every staff member whom a customer encounters is expected to deliver outstanding customer service at all times, in a courteous manner while providing service that reflects the excellence of Taxx Solutions

Services. Balancing work and life priorities is a challenge but with creative solutions for time, management can help a great deal. I would bring an array of experience in customer service and communication skills to the committee. I am skilled in providing a high level of product and leadership support to representatives and clients. Effectively communicated with team members to maintain clearly defined expectations, addressed negative customer feedback immediately, and applied the positive reinforcement method to redirect negative behaviors. Communicated effectively, both orally and writing so that learning occurs in order to motivated and achieve educational objectives.

I also conducted new employee orientation to foster positive attitude toward organizational objectives. Identified staff vacancies and recruited, interviewed, and selected applicants. Trained and managed new hires and existing employees, achieving significant improvement in the productivity. Ensured exceptional client service and quality product offerings. Planned, coordinated, and controlled daily operations of the organization. I am skilled in dispensing guidance, direction, and authorization to carry out major plans and implemented corrective actions. I ensured work was accomplished in a safe manner in accordance with established operating procedures and practices. Organized meetings and represented the company at industry meetings.

Overall, I am an articulate business manager driven to succeed and strategic planning, client relationship, management professional and highly skilled in directing teams in delivery of exceptional customer service. I have a reputation for establishing priorities, scheduling, and meeting deadlines through the skillful allocation of human and material resources

### **PERSONAL BIOGRAPHY**

I am VaNessa Robinson-Dawson, of Alabama. I live in the city of Birmingham nickname the magic city. I am a small business owner of twenty-five years, book writer, educator, life coach, mother of three, and grandmother of nine. I have been a very successful business owner. I am entering a new stage in my life where life is much simpler. Realize that it is okay to make mistakes, just make sure to learn from your past mistakes, forgive yourself, and move on and it really feels goods and looks good on me. I am enjoying the journey, not just the destination. I am traveling more attending workshops and teaching too. I use my energy wisely, because spending energy complaining and worrying or being impatient is just wasted energy. Being a life coach has afforded me the knowledge of living a live with no regrets by teaching along the way.



## **Serge Gautron, EA Winnipeg, Manitoba**

### **PLEASE OUTLINE THE SPECIFIC SKILLS YOU BRING OR CONTRIBUTIONS YOU HOPE TO MAKE TO THE NSTP BOARD**

In 2016, I earned the Enrolled Agent designation after passing all three SEE exams after taking NSTPs Boot Camp with Isaac and Nina.

In May of 2015, I taught a course at the NSTP Niagara Falls Special Topics workshop where I discussed foreign tax issues in relation to reporting Canadian income on a US tax return. I have routinely been invited to present topic on Canadian taxation for the practicing artist at the University of Manitoba.

I am offering my leadership skills to NSTP. These skills are built on strong interpersonal relationships and on a vision for future success of the organization.

### **BRIEFLY DESCRIBE YOUR RELATIONSHIPS AND ASSOCIATIONS WITH OTHER ORGANIZATIONS**

I am a member of NAEA, because I believe that it is important to support an organization that my credentials. NAEA is committed to advocating on behalf of EAs on legislative and administrative issues and I want my credentials to be supported since I have worked hard to achieve this goal. Similar to CPA's belonging to the AICPA, etc...

### **LIST OTHER RELEVANT EXPERIENCE**

I have served as Treasurer on 2 other boards.

I currently serve on the NSTP advisory board which brings suggestions and input to the NSTP Board of Directors to

assist in making policy and decisions as well as planning for the next steps in the evolution of this fine organization.

**PLEASE SHARE ANY OTHER INFORMATION YOU FEEL IMPORTANT FOR CONSIDERATION OF YOUR APPLICATION TO SERVE AS AN NSTP BOARD MEMBER**

I have attended NSTP education events constantly since 2011; I have attended the Williamsburg RTRP training, several Napa Grand events, a Las Vegas EA Boot Camp and a Las Vegas Update event. Each of these educational sessions have proved invaluable, in both the educational content and in developing lasting professional relationships and associations with other great NSTP members.

I would like to see the organization grow. It is important for NSTP to examine and determine who the ideal NSTP member, and to find ways to attract that target market into membership. More EAs would be important since they are credentialed and attend education.

I pride myself on being able to evaluate both sides of an issue. I find it important to carefully balance the pros and cons, the right and the left, prior to making a decision or taking a stand.

I feel that our association with affinity partners or vendor partners, such as CCH, Paychex and Fast Forward to name a few, is an important one, that must be nurtured and strengthened. With their help, we can bring additional value to the members.

Supporting and strengthening our education that is offered by NSTP is a must. The great base of topics is a great foundation upon which we can build other topics to reach more of our membership and expand our reach to new members. I am currently working on a course that I hope to bring to the Education Director in the next year.

I look forward to making a long-term contribution to the NSTP organization helping strengthen existing membership relationships and increase the membership numbers. I see myself helping the board over several terms. I am the person the board should support.

**PERSONAL BIOGRAPHY**

I have successfully built a US tax practice in Canada from the ground up. I sold this successful practice in 2015. The non-compete provision has now expired, as a result I am easily building another practice with a new client base.

I have much to offer to NSTP in terms of my varied leadership experience. I am a family man, husband of 17 years and father of three young daughters. I am a renaissance man! I have worked in several industries including machining, renovation construction, retail and restaurant. This experience has helped me build strong rapport with several of my clients and understand several industries and their needs. I have had 2 patents pending on some of my inventions and am working on new applications this year.

I am also currently working on the release of my first book entitled Franklin's Way which is a short book based on Benjamin Franklin's success principles. I currently also run a social media marketing agency, this specific skill would be invaluable to NSTP membership in bringing in the next generation of Tax Professionals.

We need to look ahead at what the tax practice and preparer of the future looks like. Properly positioned, NSTP can be instrumental in helping the Tax Professional of the future.

I am young, energetic and I am just getting started. I have a lot to offer, and look forward stepping into all aspects of NSTP such as education, membership, affinity partners, procedures and policy.



## **Kadenia Jarvis, MBA**

### **Columbia, South Carolina**

#### **PLEASE OUTLINE THE SPECIFIC SKILLS YOU BRING OR CONTRIBUTIONS YOU HOPE TO MAKE TO THE NSTP BOARD**

I am celebrating 19 years as an Accountant. I have been employed as a City, State, & Federal employee at the IRS and have myriad of experience from the public and private sector. This year I celebrate being self-employed 8 years. Started with 1 office location and we have been blessed to open 3 locations to help with the taxpayer disparity.

#### **BRIEFLY DESCRIBE YOUR RELATIONSHIPS AND ASSOCIATIONS WITH OTHER ORGANIZATIONS**

I am a member of the NATP & NSTP. I attend seminars annually. I am a member of other local organizations. Please see curriculum vitae.

#### **LIST OTHER RELEVANT EXPERIENCE**

Former IRS employee in Columbia, SC. Position was in ITAS Dept. (Individual Taxpayer Assistance Specialist). I have been in banking & finance since beginning of career in 1995.

#### **PLEASE SHARE ANY OTHER INFORMATION YOU FEEL IMPORTANT FOR CONSIDERATION OF YOUR APPLICATION TO SERVE AS AN NSTP BOARD MEMBER**

I would love to commit my professional expertise, experience, and connections to assist in fostering a continuing strong alliance to the NSTP by planning and implementing tax advisor education.

I would love to be apart of the Board to advance the mission and priorities of the NSTP through board and committee attendance and participation.

I would generate continued awareness of the NSTP through personal and professional connections.

#### **PERSONAL BIOGRAPHY**

Kadenia Williams-Javis, MBA is the Proprietor and CFO of Jarvis Financial Services, LLC dba Jarvis Tax Service. Kadenia believes in educating her community about their tax liability and she is also an advocate for tax literacy.

Kadenia is dedicated to providing assistance to individuals and businesses with their tax concerns and questions. Her passion is helping consumers "Avoid the Franchise Fees," and letting them know that there is "An Affordable Alternative!"

Kadenia has the education necessary to impart information to the public and thousands depend on her expertise. Mrs. Jarvis received her BS degree from Limestone College and attained her MBA degree from Strayer (Magna Cum Laude). She holds the designation as an Authorized Electronic Provider, Registered Tax Return Preparer (RTRP) & Electronic Return Originator (ERO) with the Internal Revenue Service. She has numerous professional development certificates from the American Institute of Banking, National Association of Tax Professionals, National Society of Tax Professionals, Dale Carnegie Training, Rhodes Financial Services, and is a South Carolina Notary Public just to name a few.

Established in 1998, 2010 was her first year providing year round service at the firm. After a career in banking and finance for the past fifteen years working for companies such as First Citizens Bank, Blue Cross Blue Shield, NetBank formally RBMG, Strayer University, University of SC, Allen University, Richland County School District #1, Internal Revenue Service, and as an Fiscal Accountant for the Department of Army (SC National Guard/US Property and Fiscal Office). Kadenia has discovered that numbers is her niche and helping others so she plans on expanding her tax office and offering more financial products in the future.

Kadenia and her staff continue to stay abreast of new tax laws by taking required classes offered by the Department of Revenue, National Association of Tax Professionals, forums and symposiums held by the Department of Treasury so that she may answer questions and concerns that customers may have. If she doesn't have the answer she knows



what resources to use to get the accurate information.

Kadenia's faith and perseverance has led her to build a clientele on word of mouth alone. She credits several mentors that she thanks God for putting them in her life to make this dream become a reality, especially her mother-in-law, who knew she had the drive and tenacity to start her own business.

As a woman of faith and child of God, she knows how to connect with people from all walks of life. Her non-judgmental attitude and candid personality has allowed building a diverse clientele. One of her favorite scriptures is: Luke 6:38 Give and it will be given to you. A good measure, pressed down, shaken together and running over, will be poured into your lap. For with the measure you use, it will be measured to you.

Her contributions to her community are further expressed through her Non-Profit Organization "FBLA Jr. Scholarship

Foundation which started in 2014 to employ interns and introduce them to the facets of business, involvement with her church Word of God under the direction of Bishop Eric Davis, Gill Creek Baptist Church, VFW Post 4262, Volunteer Parent in Richland School District #2 and a member of Alpha Kappa Alpha Sorority, Inc. Kadenia is married to Christopher L. Jarvis and they are the proud parents of four children (Kristen, Kaitlin and twins Morgan & Meagan). She is the eldest child born to Charles Williams and Shirley Harts Williams, and has one brother (Charles Keon Williams).



## Farid Kanji, EA Simi Valley, California

### PLEASE OUTLINE THE SPECIFIC SKILLS YOU BRING OR CONTRIBUTIONS YOU HOPE TO MAKE TO THE NSTP BOARD

- Hard worker and dedicated to well being of the Organization
  - Critical Thinker
  - Team player
  - People Person
- Briefly describe your relationships and associations with other organizations
  - Board Member of National Assn Tax Professionals (Ca Chapter)
  - Board Member and Project Manager of Financial Literacy Program For AKEPB (Community based national program)

### LIST OTHER RELEVANT EXPERIENCE

I have been an EA for the last 25 Years. I have been involved with a lot of different Organizations during my lifetime but always find that I come back to the financial aspects of service.

Service oriented individual who believes in giving back.

### PLEASE SHARE ANY OTHER INFORMATION YOU FEEL IMPORTANT FOR CONSIDERATION OF YOUR APPLICATION TO SERVE AS AN NSTP BOARD MEMBER

I have been in Tax Preparation business for over 30 years and now it is time to give back

### PERSONAL BIOGRAPHY

I was born in Uganda and immigrated to England where I got my degree in Hospitality Industry. We moved to America in early 1970s.

I have always worked in a service industry. I was a Controller for several Hyatt Hotels and then opened up my own Tax Preparation Office.

As a Hotel Employee, I have lived all over the United States and presently call California, my Home.



## Gloria Kuhn, EA New Hampton, New York

### **PLEASE OUTLINE THE SPECIFIC SKILLS YOU BRING OR CONTRIBUTIONS YOU HOPE TO MAKE TO THE NSTP BOARD**

I believe in heightening public awareness in the importance of professional expertise required for accurate income tax preparation in this country. There is too little respect for the professionalism and knowledge that is constantly being updated and improved among tax professionals, with diy programs marketing to the public by minimizing the knowledge that it really takes to prepare tax returns correctly. My skills consist of 38 years of experience in income tax preparation, having taken and passed the Enrolled Agent exam at the first attempt, in 1987. I have a dedication and a passion for excellence in my work, and I have an interest in ensuring that an abundance of educational opportunities exist in all aspects of taxation so that we can better serve our clients while recognizing the commitment we all must maintain to adhere to the rules, regulations, and standards of the government agencies that allow us to work in our field. I have no experience in participating with boards of professional societies, however I have been an active and hard-working Enrolled Agent for over 30 years and I have a lot of respect for our profession and my colleagues. I'm highly organized and efficient in being entrusted with tasks. I feel that constant legislative attention needs to be paid to taxpayer issues, tax laws that need clarification and fairness, and also to the practitioner community and our desire to ensure that those who prepare tax returns for compensation should be required to meet basic competency standards, and I would enjoy being part of an organization that shares my goals.

### **BRIEFLY DESCRIBE YOUR RELATIONSHIPS AND ASSOCIATIONS WITH OTHER ORGANIZATIONS**

I have none. I am a member of this organization plus the National Association of Enrolled Agents and the New York chapter. I'm presently working on an NTPI fellowship through NAEA, this would be a fellowship in taxpayer representation - which I hope to complete later this year.

I also have attained the Registered Representative status through my passing the Series 6 and 63 exams and presently am a registered advisor with HD Vest.

### **LIST OTHER RELEVANT EXPERIENCE**

Aside from my desire to become part of and help a professional organization in my field, I have nothing else to add.

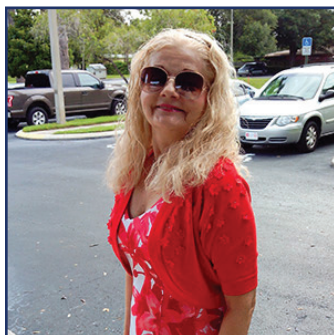
### **PLEASE SHARE ANY OTHER INFORMATION YOU FEEL IMPORTANT FOR CONSIDERATION OF YOUR APPLICATION TO SERVE AS AN NSTP BOARD MEMBER**

I'm hard-working and dependable. I'd enjoy the opportunity to participate in an organization that promotes the public and legislative recognition of and respect for our professional commitments to excellence in our work.

### **PERSONAL BIOGRAPHY**

I was a music major in high school and college, having grown up in New York City during the 1960's, a very exciting time to be young and in the greatest city on earth during an era of growth and overwhelming societal change. Dropped out of college to marry young and subsequently have become the mother of my nine (9, yes that's correct) children. Staying home with young children gave me a lot of time to read, and having read IRS Publication 17 cover to cover by the age of 25 and teaching myself how to prepare my own tax returns, I decided to take an H&R Block tax preparation course in the evenings. The local office gave me an exam (no computers back then) and offered me a job, but after putting out a few inquiries in my small town, I learned that a new office had opened with a husband and wife team of Enrolled Agents, who had formerly been IRS agents. This was intriguing to me, so I applied for, and luckily landed, this job. Working in their back office, I learned everything about how to prepare income tax returns, from the ground up (and still, no computers!). After a few more years, a couple of more children arriving in my life, and a lot of turmoil at the business, I decided to start my own practice in 1980. By 1986, just weeks before the birth of my 9th child, I took and passed the Special Enrollment Exam down at IRS Manhattan regional headquarters. Over the years, I've worked per diem in a number of small accounting firms and have maintained my small, boutique practice, in which I pay a lot of attention to my clients. I find this kind of interaction with clients is the strength of my business model, and has kept me involved in three generations of families. There are so many more aspects to people and their complicated financial lives than just scanning a bunch of paper and inputting data into a computer. My children are

grown now; none has selected this field for a career, but among my kids I have raised some really wonderful adults, who have become educators, restaurant managers, and an attorney and are all highly successful. All except two of my boys are married. When I'm not preparing taxes or consulting on taxes or studying taxes (my life's work) - I still dabble in the piano, my first field of study, and when I can, I enjoy quiet walks on Sunset Beach, in North Carolina, one of my favorite places. My husband and I will probably always live up here in the beautiful Hudson Valley, mostly because I can't imagine any season of NOT seeing my clients, many of whom have become like family.



## Jacqueline R. Maltry, CPA, CFE, MBA Largo, Florida

### PLEASE OUTLINE THE SPECIFIC SKILLS YOU BRING OR CONTRIBUTIONS YOU HOPE TO MAKE TO THE NSTP BOARD

I have served on the Hospital Foundation in Tampa Bay for over 18 years and Contributed to other Charitable Foundations at the same time period as a Member of Pinellas County Estate Planning Council, also a member of NAEPC I have advanced knowledge in the area of Trust and Estate Law.

As a Member of the Global ACFE for 13 years my knowledge of Cyber Security a major threat to the Tax Preparer is covered in most articles of our International Magazine "Fraud" and we are required to submit 20 hours of CPE a Year.

Last year I also Certified with QBO Cloud Accounting Pro Advisors to assist my two largest client that chose this Software and be knowledgeable.

As a Graduate Professor of International Students at Schiller from 2008-10 I maintain contact with them on Facebook and they continue to ask my advice from all over the World. We are a Global Community.

### BRIEFLY DESCRIBE YOUR RELATIONSHIPS AND ASSOCIATIONS WITH OTHER ORGANIZATIONS

- Morton Plant Mease Foundation Planned Givers 1999- Present
- PCEPC a member of NAEPC 1999- Present
- Intuit ProAdvisor Certification 2016
- Schiller International University Professor of Graduate Accounting 2008-2010

### LIST OTHER RELEVANT EXPERIENCE

- My firm has worked with Litigation support for over 19 years and was Published in the Tampa Bay Review and published an article on " Florida's Largest Ponzi Scheme" for Tampa Bay CFE.
- We have always worked with Individuals, Corporations and Trust and Estate Tax since this firm began in 1993.
- We put ourselves through our MBA at Florida Institute of Technology with a small tax firm of Local Verizon Union who had lost their Enrolled Agent.
- We trained with Cherry Baekaert LLP of Richmond now #10 in the US with 110,000 employees Globally.

### PLEASE SHARE ANY OTHER INFORMATION YOU FEEL IMPORTANT FOR CONSIDERATION OF YOUR APPLICATION TO SERVE AS AN NSTP BOARD MEMBER



My Code of Ethics is the highest at the ACFE even above the CPA

### **PERSONAL BIOGRAPHY**

My undergraduate experience at USF graduating Magna Cum Laude Beta Gamma Sigma Phi Kappa Phi and winning the Beta Alpha Psi Scholarship gave me a lifelong quest for knowledge. My prior to CPA positions were youngest Woman Manager at Ford Import Center, Senior Analyst on \$70 million of DOD contracts with top Secret Clearances, and Cost Accounting Manager for Pfizer. This gave me a solid background in all Industries when I worked for Cherry Beakaert in the mid 1980s after passing the CPA exam at first sitting in 1983.

My goals in starting my own firms during graduate school were to give the highest level of Ethical Tax Advice, Preparation and Meet IRS and GAO Standards.

This firm began in 1993 with 19 years of Litigation support, now high level Real Estate Investors, IT professionals and two Major Corporations using QBO.

We are a small boutique firm but feel we have the time to serve on a Board and vast knowledge to contribute.



## **Isaac R. McRae, III, EA, MST, NTPI FELLOW**

### **NSTP Instructor, Hotline & Webinar**

### **Washington, District of Columbia**

#### **PLEASE OUTLINE THE SPECIFIC SKILLS YOU BRING OR CONTRIBUTIONS YOU HOPE TO MAKE TO THE NSTP BOARD**

Ability to communicate. develop and teach education courses that appeal to all experience levels of members. Ability to bring new ideas with vision to NSTP to help develop the organization membership. The ability to participate and effectively communicate to IRS personnel at all levels. The ability to effectively communicate to the media (TV, radio and print). The ability to effectively communicate to Congressional legislative staffers.

#### **BRIEFLY DESCRIBE YOUR RELATIONSHIPS AND ASSOCIATIONS WITH OTHER ORGANIZATIONS**

Former member of NATP, MSA and NABA. Former VP of the MDDCSEA. Former Professor of Taxation at Southeastern University and former Instructor for MDDCSEA EA course. Former Chairperson of the Hosting Committee for NAEA. Current member and Capitol Hill lobbyist for NAEA. Current member and Instructor for NSTP.

#### **LIST OTHER RELEVANT EXPERIENCE**

Served and participated in several IRS focus group panels.

#### **PLEASE SHARE ANY OTHER INFORMATION YOU FEEL IMPORTANT FOR CONSIDERATION OF YOUR APPLICATION TO SERVE AS AN NSTP BOARD MEMBER**

I believe NSTP can benefit from my 30 years of professional tax experience.

#### **Personal biography**

I have been in practice for over 30 years. Prior to starting my full time practice I was employed by the DC Department of Finance and Revenue. I have a bachelors in Accounting and a Masters in Taxation. I was twice ranked in the top 10% of tax professionals in the nation by money magazine. I've appeared several times on local news channels as the tax expert and I've appeared on several radio stations answering tax questions for the general public. As an Instructor I have taught the SEE Exam, RTRP Exam and AFSP Exam preparatory courses with attendees passing and receiving their license or certificate.



## Susan E. Miller, MBA Denver, Colorado

### PLEASE OUTLINE THE SPECIFIC SKILLS YOU BRING OR CONTRIBUTIONS YOU HOPE TO MAKE TO THE NSTP BOARD

Vision, patience and the ability to get along. See Bio

### BRIEFLY DESCRIBE YOUR RELATIONSHIPS AND ASSOCIATIONS WITH OTHER ORGANIZATIONS

See Bio

### PLEASE SHARE ANY OTHER INFORMATION YOU FEEL IMPORTANT FOR CONSIDERATION OF YOUR APPLICATION TO SERVE AS AN NSTP BOARD MEMBER

I have finally figured out how to get along with Millennials

### PERSONAL BIOGRAPHY

I am interested in applying for the open position(s) on the NSTP Board because I feel that during my years in the Tax Business that I might have some insight from working the “Tax House” side of the business to be able to be able to recruit young members.

I started in 1986 at CCH Computax working in the back room sorting and verifying returns which were going to the computer. This was state of the art for the time and the returns were mostly oil and gas. This was during tax season for extra \$'s while working on my MBA with emphasis on Finance and Accounting at Regis University. The following Tax Season I was hired to work in the office answering the telephone while still at Regis.

It wasn't until 1997 that I got involved in the preparation side of the business. I was working on my own business and needed to get out of the apartment which was a loft. I saw an ad for Public Relations and it was H&R Block and they paid me to go to their tax school. Worked during tax seasons becoming a manager the next season until 2002. During 2002 I was offered a position opening a Tax Office for Jackson Hewitt and stayed with them through tax season 2005 teaching 4-5 classes, running the holiday help loans and opening new offices. Tax Offices in retail locations became my specialty. During the fall of 2005 I opened a tax office for a CPA Firm's Client in the CPA Office Building and learned about how annuity agents find new clients mostly in the senior market. The next tax season I went back to Jackson Hewitt and opened a new store in a Kmart and again made my figures. I was the one that the District Office sent problem preparers. I always managed to find out their interests and past skills and sent them to talk to the customers shopping in the tool department for small contractors or cleaning services or whatever department they could find someone to start a conversation. It always worked big time.

Then in 2007 I became the Building Manager of the extended stay where I had worked as assistant manager from 2004-2007 and took a position at a CPA Firm preparing and reviewing 1040 returns until 2011 when I started doing taxes on my own in my private office at the Extended Stay Hotel which is what I'm doing today.

I was born in Pittsburgh, PA and grew up in Asheville, NC. I attended the Plank School of Creative Arts through 4th grade and then transferred to what is now called Carolina Day School from 5th grade through high school. I rode competitively through school and taught riding at a summer camp for two summers. Then I went to Colorado State University where I rode on the mounted drill team and majored in Speech Arts with a minor in English. During summer breaks of my sophomore and junior years I spent the summers working at The Vagabond School of Drama, Flat Rock, NC which was and still is the State Theatre of NC. After college I moved to Denver worked in sales and went back to school for a BS in Business/Economics and an MBA with emphasis in finance and accounting at Regis University.

I have also completed the 168 hours of Real Estate studies at Kaplan University and have passed both the Federal and State Exams due to being a Property Manager and Leasing the units.

I have always enjoyed the NSTP Event and hope to be a part of bringing young people into the tax profession