



Scheduled Conference

38th Annual TEI-SJSU High Tech
Tax Institute
November 7 & 8, 2022

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MST FACULTY NEWS

Professor Joel Busch made the following presentations:

- Confidentiality of Taxpayer Information for the Santa Clara County Assessor's Office 2022 Virtual Training Symposium, 1/28/22
- Federal and State Tax Updates for the Santa Cruz County Bar Association, 6/2/21
- Prop. 19 - What it Means for You and Your Clients, MST Program Webinar, 6/4/21

Professor Annette Nellen made the following presentations:

- Tax Policy Analysis of the Build Back Better Act, presented at the CSUN Bookstein Institute 2022 Tax Development Conference, 4/29/22 and to the Santa Clara Estate Planning Council, 2/22/22
- Strategies to Deal with the Increasing Complexity of Finding our Tax Laws, San Francisco Tax Club, 3/3/22
- Fun with Magic Internet Money (and Other Digital Assets), ABA Mid-year Meeting, 2/2/22
- Cryptocurrency Tax Matters, for the Santa Clara County Assessor's Office Virtual Training Day, 1/28/22
- Dealing with Cryptocurrency Traps and New Legislation, for The Blockchain and Cryptocurrency Summit, organized by University of Naples Federico II, University of South Florida M3 Center, and ANAHEI, 1/26/22

Professor Nellen had two articles published in her *Tax Notes State* column (Moving Forward?): Where's the Workforce Infrastructure Bill? 1/2/22; and Push Out and Digitally Empower Data for Much-Needed Tax Transparency, 5/16/22.

Mark Your Calendars - Fall MST Webinar on Section 1031

Our continuing MST webinar program for MST students and alums and friends of our program will offer a 1-hour program on November 18 from noon to 1 pm on Section 1031 like kind exchanges including traps for the unwary, planning considerations and noteworthy 1031 transactions. MST adjunct instructor Zach Nolan will be the presenter. Zach teaches partnerships and corporate reorganization courses in the MST program. To register, please visit <https://www.sjsu.edu/taxinstitute/webinars.php>.

Tell your colleagues about our upcoming information sessions. All sessions will be conducted via Zoom. For more information, and to register, refer them to:

<http://www.sjsu.edu/lucasgsb/events/index.html>

STUDENT NEWS

Congratulations to Karla Abrams Outstanding MST Graduate for Spring 2022



"It is an honor to receive the most outstanding MST graduate award this term.

I plan to continue using the research and tools learned in this program to provide tax planning and preparation for my clients plus collaborate with my fellow colleagues on tax interpretation on real life scenarios.

My advice to students is to speak up when there is silence in the classroom or ask your question for all students to hear. Professors can guide you to a correct answer if you are missing the key point. Plus you will tend to remember the answer for the test or for work when you encounter the scenario again. "

Thank You to Spring 2022 MST Mentors

We extend a big thank you to the following students who made time to help welcome and guide our new spring 2022 students: Dale Loepp, Gelena Shvetsova, and Nina Kramarenko.

Professional Development for MST Students

As part of our reinvigorated efforts to help MST students create short and long-term career plans, we invite folks with varied tax careers to present to students. This past year students had the opportunity to hear from:

- Geni Whitehouse, CPA - Founder at The Impactful Advisor, author, and on Accounting Today's recent list of the 100 most influential people in accounting
- Steven Shee - VP for Global Tax at Applied Materials; member of SJSU Tax Advisory Board
- Edward Van Deman, CPA, PFS - Co-Founder of Forest Systems, Inc.

Have an MST? How About Earning a 9-Unit Advanced Certificate in Taxation

To learn how to earn an advanced certificate in international taxation or high tech taxation, please visit <https://sjsu.edu/lucasgsb/prospective-students/advanced-certificates/index.php>. Summer MST classes that will count towards the certificate include Fundamentals of Transfer Pricing; Data Analytics; and State Taxation Fundamentals.

If you have questions, please contact MST Program Director Annette Nellen at annette.nellen@sjsu.edu.

ALUMNI NEWS

David Neighbors, CPA, MST



David is a partner in BDO's San José office with over 30 years of public accounting experience. He specializes in working with high-net-worth individuals and families, including founders of closely-held businesses and C-level executives of multinational corporations. He also has extensive experience with partnerships and S corporations. David has worked with clients in the construction and real estate, manufacturing and distribution, technology, professional service, and retail industries.

David has both his undergraduate degree in accounting and MST degrees from San Jose State University. He is an adjunct professor in the MST program teaching individual Tax Compliance and S Corporation Taxation.

Dave says of his university studies and career: "As a proud product of migrant farm workers, and first generation college student, attending San José State University was a dream come true! The primary difference between my undergraduate studies, and my coursework in the MST program is that, as an accounting undergraduate, my focus was to obtain my degree and become an accounting professional; my MST goal was a quest to quench my thirst for tax knowledge. As a working professional, I had been exposed to the basics, and taught to follow last year's workpapers. I will not forget my first courses with Professor Nellen (research and partnership taxation). Those courses allowed me to better understand the law, and why certain information is included in tax returns."

Dave's advice for students: "While my initial desire of the graduate taxation program was to learn everything there is to know about taxes, I came away with a transformative experience that allows me to recognize issues, to know where to find answers, and (perhaps most importantly) the realization of what I do not know and when (and where) to ask for help. Now I have the honor of teaching in the program, and I am continuously invigorated by the commitment, dedication, and work ethic our of students."

MST students and alums: Have news to share with others? Please send details to catherine.dougherty@sjsu.edu.