

Lynda R. Boman

LYNDA R. BOMAN, C.P.A., M.S. in Taxation, is the founder of Boman Accounting Group, Inc.. Her area of expertise is individual tax preparation and planning, as well as specializing in non-profit accounting and auditing. She is the current state chair of the Management of an Accounting Practice committee for the California Society of Certified Public Accountants, as well as serving as the board secretary for the California Society of Certified Public Accountants (San Jose Chapter). She also teaches “*Income Tax Accounting*” for U.C. Santa Cruz-Extension.

Brenda Voet

Brenda Voet has been with the Franchise Tax Board (FTB) for more than 25 years. Prior to becoming a technical assistant to the Taxpayers' Advocate, she worked in the Public Affairs Office for two years and more than 20 years as an auditor, hearing officer, and subject matter expert with the FTB. Brenda has worked in various audit programs including taxation of California non-residents, and flow-through entities. She was awarded a Master of Science in Taxation from California State University, Hayward (now known as East Bay). Brenda earned her undergraduate degree from California State University, Sacramento, in business administration with concentrations in accounting and management information systems. She also earned a Certification in Public Relations from the Specialized Studies Program at the University of California, Davis Extension program.

Nicholas Connors

Nicholas Connors, Special Enforcement Program (SEP) Group Manager, began his career with the Internal Revenue Service in 2001 as an SBSE general program Revenue Agent in San Jose.

In 2006, he moved to Special Enforcement which is a small, National Program that investigates individuals involved in illegally-sourced businesses. Common investigated activities include political corruption, narcotics, racketeering, organized crime and high-profile white collar criminals. SEP agents function as expert witnesses in criminal trials brought by the Department of Justice.

While in SEP, Nick provided testimony in criminal tax cases in the 9th District as well as civil tax cases in Tax Court.

Nicholas Connors is a Certified Public Accountant and a Certified Fraud Examiner. He holds a BA in economics from UC San Diego and a MS Accountancy from San Diego State University.

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James C. Counts II, CPA CTFA

James Counts II, a CPA and CTFA practitioner in Hemet, CA, specializing in income tax returns for individuals and businesses along with estate and fiduciary tax returns and preparing accountings. I assist clients in estate planning and working with clients to identify terms and conditions they wish in their estate plan. I serve as a trustee on trusts and assist others that serve as a fiduciary. I consult and represent businesses in payroll and income tax audits before IRS, FTB and EDD from referrals received from tax practitioners.

Chair of Committee on Taxation of the Citrus Belt Chapter from 1985 to 1987 - As the Chair I planned and conducted committee meetings along with an annual Chapter Tax Night. At one Tax Night had Gerry Goldberg, Executive Director of FTB as keynote speaker with about 250 in attendance.

Member of the Board for the Citrus Belt Chapter.

Member of the State Committee on Taxation (COT) from 1985 to present

- Part of the COT mission is to maintain a liaison with tax agencies representing the CPA Society. As a member of State COT I have:

- Instituted a liaison to the California Employment Development Department (EDD) in 1995 and continue to serve as the liaison since 1992 to present

- As part of this liaison I continue to serve on the Small Business Employer Advisory Committee (SBEAC) that is a advisory group to EDD of representatives of small businesses on matters affecting small businesses. We usually meet four times a year. The SBEAC began May 1993 by EDD.

- I began a listserv in September 1999 for the State COT for CPAs called TaxTalk which currently has about 1,100 subscribers. The listserv is to discuss tax questions and issues affecting CPAs in the tax area.

Member of the State Technology Committee (since about 2000)

Presentations to various CPA groups. I have made presentations on tax issues to various discussion groups, chapters and for the education foundation conferences.

Angie Dang

Internal Revenue Service

Angie has twelve years of experience with the Internal Revenue Service including the past four years as a Revenue Agent Group Manager. She has a BA in Mathematics and is a Certified Public Accountant. Previous careers include experience as a Franchise Tax Board Auditor and engineer.

John Kachmanian

Customer Service Supervisor
City of Santa Clara
Finance Department

John Kachmanian has ten years of customer support experience, with nine years managing customer and technical support teams. Currently, in the City of Santa Clara's Finance Department, he manages a team of customer service representatives in support of City utilities, business tax, and cash management functions. Prior to his current role, John directed a global customer support team at CashEdge, which was later acquired by Fiserv. CashEdge/Fiserv provides online wealth management, funds transfer, and account software and services to leading U.S. financial institutions. Previous to CashEdge/Fiserv, John managed a customer support team at SuccessFactors, a Human Capital Management (HCM) SaaS firm later acquired by SAP.

John earned a Bachelor of Science Degree in Business/Management Information Systems from San José State University in 1995.



Stacey Montes

Senior Manager, Sensiba San Filippo LLP

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408.286.7780

With over 14 years of experience in tax planning and compliance, Senior Manager **STACEY MONTES** specializes in multi-state tax reporting, S corporations, corporate income tax provisions and tax consulting for high net worth individuals.

Stacey works extensively with clients in real estate, manufacturing and technology. She is an expert in pass-through entities, S corporations, real estate partnerships, tax planning for privately held businesses and their owners, and IRS/Franchise Tax Board audit representation.

Stacey received her bachelor's degree in Accounting from Gonzaga University in 1998. She is a licensed CPA in the state of California. Outside of work, Stacey enjoys spending time with her family and scrapbooking.

ANNETTE NELLEN

San Jose State University

Annette Nellen, CPA, ESQ., is a professor in and director of San Jose State University's graduate tax program (MST), teaching courses in tax research, accounting methods, property transactions, state taxation, employment tax, ethics, tax policy, tax reform, and high technology tax issues. Annette is the past chair of the AICPA Individual Taxation Technical Resource Panel and is a member of the Executive Committee of the Tax Section of the California Bar. Annette is a regular contributor to the AICPA *Tax Insider* and *Corporate Taxation Insider* e-newsletters. She is the author of BNA Portfolio #533, *Amortization of Intangibles*. Annette has testified before the House Ways & Means Committee, Senate Finance Committee, California Assembly Revenue & Taxation Committee, and tax reform commissions on various aspects of tax reform. She maintains the 21st Century Taxation website and blog (www.21stcenturytaxation.com). Prior to joining SJSU, Annette was with Ernst & Young and the IRS.

Information on SJSU's MST Program - <http://www.sjsu.edu/lucasschool/prospective-mst/index.html>.

Tiffany Phan
Business Taxes Specialist I
San Jose District Office
Sales and Use Tax Department

Length of Board Service: 13 years

Responsibilities:

- Perform monthly review of collection accounts
- Render advice to staff
- Develop, revise, and maintain training course materials for the Department
- Prepare replies to issues of tax law and compliance function policies and procedures
- Serve on special project committees
- Training coordinator
- Review and approve vehicle use tax clearance
- Teach basic Sales and Use tax seminar both in English and Vietnamese

Education Highlights: Graduated from San Jose State University
B. S. in Business Administration – Finance

