2026 Blockchain Tax Conference

Speaker Bios

January 30, 2026

Jen Brown

Vice President, BGR Government Affairs, LLC

Jen Brown is a Vice President in BGR Group's Financial Services & Tax Practice and Co-Lead of BGR's Higher Education Working Group. She draws on two decades of policy experience and legal expertise to guide clients through complex tax, financial services, and higher education issues throughout all levels of Washington, DC.

Before joining BGR in January 2025, Jen spent five years on Capitol Hill, in variety of senior roles—including as Senate Majority Leader Chuck Schumer's (D-NY) Banking Counsel. Prior to her role with Leader Schumer, Jen served as the Tax Counsel for a senior Senate Finance Committee member and Chairman of the Senate Foreign Relations Committee, and as the Economic Policy and Oversight Counsel to House Small Business Committee Chairwoman Nydia Velázquez (D-NY) during the COVID-19 pandemic.

Jen played a key role in negotiating, passing, and implementing major legislation, including the Inflation Reduction Act, SECURE 2.0, several COVID relief packages, and annual NDAA and appropriations bills. She frequently led negotiations among congressional leadership, committees, government agencies, the White House, and states.

Prior to her service on Capitol Hill, Jen spent over a decade in key policy roles at UnidosUS, as an instructor at American University, the National Institute on Retirement Security, and as an Employee Benefits Law Specialist at the U.S. Department of Labor. She is a recognized expert in tax policy and economic security and regularly testifies before Congress, advises legislators and presidential campaigns, and her analysis has been featured in major media outlets.

Bea Castaneda

Global Tax Information Reporting & Digital Asset Leader, Independent Advisor

Beatriz Castaneda is a global tax information reporting and tax transparency executive with more than 25 years of experience spanning traditional financial services and digital assets. She advises organizations on the application of U.S. and international information reporting rules, emerging regulatory requirements, and the operationalization of scalable reporting frameworks across complex product environments.

Ms. Castaneda currently serves as an active member of the IRS Advisory Council (IRSAC) through 2026, contributing to the Information Reporting Subgroup and supporting the development of regulatory guidance and industry-government collaboration. She is widely recognized for her leadership in information reporting, digital asset reporting strategy, and global transparency regimes, and frequently speaks on topics including 1099-DA implementation, cost basis, CRS, DAC8, CARF, and the future of tax transparency.

Shehan Chandrasekera

Head of Tax Strategy, CoinTracker

Shehan is one of the few CPAs nationally recognized as an expert in cryptocurrency taxation. He is the Head of Tax Strategy at CoinTracker the largest crypto tax software in the US, Forbes Senior Contributor, and a CPE instructor.

He was also one of 12 people selected by the US Treasury to testify on digital assets broker regulations.

Shehan is one of the few CPAs nationally recognized as an expert in cryptocurrency taxation. He is the Head of Tax Strategy at CoinTracker—the largest crypto tax software in the US—Forbes Senior Contributor, and a CPE instructor. His work has earned multiple honors, including CPA Practice Advisor's 40 Under 40, Outstanding Young CPA of the Year, Rising Star of Texas, and recognition by Accounting Today as one of the professionals shaping the future of accounting.

Liz Chien

CEO & Founder, Formattic Inc.

Liz Chien is the Founder and CEO of Formattic Inc. Formattic is an automated business structuring solution that provides related advisory services to clients. Through Formattic, Liz has supported clients, primarily in the digital asset sector, as fractional CFO. She has spent the past 8+ years in the digital asset/blockchain/distributed internet sector, where she served as head of tax for a number of projects, including as VP of Global Tax with Ripple Labs. Prior to crypto, Liz has extensive technology industry experience as the former head of tax for GE Digital and Alphabet/Google in the Asia-Pacific region.

Previously, she served as a policy advisor at the Organisation for Economic Cooperation and Development (OECD), where she worked on international tax reform relating to the digital economy.

Liz also served on the Blockchain Working Group for the State of California, the world's 4th largest economy, to evaluate California's use and regulation of blockchain technology.

She currently teaches international tax law at the University of California College of the Law, San Francisco (formerly known as UC Hastings) as an adjunct professor. Liz received her Bachelors and Masters degrees from Stanford University, and her Juris Doctor from UC Hastings.

Matthew Dimon

Associate, Fenwick

Matthew concentrates his practice on a wide variety of domestic and international tax matters, including both tax planning and tax controversy.

Matthew has worked with clients from equally varied backgrounds, including cutting-edge startups and large Fortune 100 companies.

During law school, Matthew was president of the Tax Club, community development chair of the Asian Pacific Islander Law Students Association, a member editor of the Stanford Journal of Law Business and Finance, a member of the Tax Pro Bono Clinic, and president of the Stanford Table Tennis Club. Matthew also worked as a Research and Teaching Assistant, and he was awarded the Pacific Tax Policy Institute Achievement Award for his work in tax.

Nik Fahrer

Director, Forvis Mazars US

Nik is the Blockchain & Digital Assets Practice Leader and is a Director in Forvis Mazars' National Office.

With a career spanning more than 10 years, his expertise encompasses serving a broad spectrum of clients, including crypto-native companies, traditional financial institutions, fintech firms, hedge funds, corporate crypto miners, and high net worth individuals.

Nik brings experience in tax compliance and consulting, financial statement audits, audit and IPO readiness, as well as advising financial institutions on stablecoin adoption and tokenization strategies.

Nik's professional involvement is further demonstrated by his active roles in the AICPA Digital Asset Tax Task Force, Center for Audit Quality Digital Asset Task Force and Wall Street Blockchain Alliance. Nik is a frequent contributor of digital asset thought leadership and public speaking opportunities and is a Bloomberg published author. As a part of the AICPA Digital Asset Tax Task Force, Nik has been instrumental in advocacy efforts toward digital asset tax guidance in the U.S.

He also supports the Missouri Bankers Association, Kansas Bankers Association, and other local and national banking industry groups through training and speaking engagements.

Nik is a member of the American Institute of CPAs while maintaining active CPA licenses in Colorado, Indiana, and Texas.

He is a graduate of University of Evansville, Indiana, with B.S. degrees in accounting and management information systems.

David Forst

Partner, Fenwick & West

David Forst
Fenwick & West LLP

David focuses on international corporate and partnership taxation and the taxation of blockchain technology. David is included in Euromoney's Tax Advisors Expert Guides where he was named one of the Top 30 U.S. Tax Advisors. He is in The Legal 500 Hall of Fame and is regularly recognized in the Law and Business Research's International Who's Who of Corporate and Tax Lawyers. David is listed in Chambers USA America's Leading Lawyers for Business, and has been named a Northern California Super Lawyer in Tax by San Francisco Magazine.

David is a lecturer at Stanford Law School and UC Berkeley Law School where he focuses on international and corporate taxation. He is a frequent contributor to Tax Notes where he has published industry leading articles on blockchain taxation. He is an editor of and regular contributor to the Journal of Taxation, where his publications have included articles on international joint ventures, international tax aspects of mergers and acquisitions, and foreign currency issues. David is a frequent chair and speaker at tax conferences, including the NYU Tax Institute, the Tax Executives Institute, and the International Fiscal Association.

Seoyoung Kim

Department Chair, Associate Professor of Finance, Santa Clara University

Seoyoung Kim is the Department Chair and Associate Professor of Finance at Santa Clara University, where she teaches Financial Engineering, Corporate Finance, and FinTech in the graduate business programs.

Seoyoung is a widely cited financial expert, with a specialized focus on structured products, risk management, and compensation/incentive alignment. Her expertise extends to crypto-assets, NFTs, and other blockchain-based DeFi protocols and blockchain-adjacent ventures – on which she has also consulted and written extensively, including her recent books: DeFi For Dummies and NFTs For Dummies.

Chris Land

Staff Director of Senate Banking Committee's Subcommittee on Digital Assets; General Counsel for Senator Lummis, U.S. Senate

Chris currently serves as Staff Director of the Senate Banking Committee's Subcommittee on Digital Assets and as General Counsel for U.S. Senator Cynthia M. Lummis. He focuses on digital asset policy, constitutional law and the legislative process.

Chris earned a Bachelor of Science (summa cum laude) from Florida State University, a Master of Laws (with distinction) from the Institute of Advanced Legal Studies, University of London, and a Juris Doctor (cum laude) from the University of Minnesota Law School.

Rob Massey

Partner & Global Tax Leader for Blockchain and Cryptocurrency, Deloitte

Rob Massey has over 25 years of professional experience in tax consulting for technology companies. Since 2012, he has focused on blockchain, digital assets, cryptocurrency and tokenization. He serves companies throughout the blockchain ecosystem inclusive of investors, miners, staking providers, payment processing, wallet hosting, custodians, exchanges, funds, DAOs, tokenization and protocol development. Rob leads Deloitte's blockchain efforts in tax for the global firm.

Rob's blockchain expertise spans the comprehensive tax considerations of blockchain enabled transactions and the analysis of the tax impacts of tokenization and digital asset transactions across business models, industries, and geographies. He also has a growing expertise in tax controversy matters involving digital assets and blockchain based business models.

Rob (and co-Author Conor O'Brien) worked with 50 other tax specialists in Deloitte to produce Bloomberg BNA's Tax Management Portfolio, Taxation of Cryptocurrency and Other Digital Assets, No. 190-2nd. This 400-page tax treatise examines U.S. federal and state income taxation of digital assets, including cryptocurrencies, providing a detailed analysis of the classification of digital assets for tax purposes. It offers an inclusive overview of the digital asset ecosystem, tax guidance to date, tax classification, and accounting treatment. The portfolio further delves into the tax implications of using, dealing, trading, and investing in digital assets, and addresses novel tax questions raised by digital asset transactions.

Sean McElroy

Partner, Fenwick

Sean advises clients, including early-stage startups, unicorns, and Fortune 100 multinationals on a wide array of domestic and international tax planning and tax controversy matters.

Sean has particular expertise advising clients on tax matters related to blockchain and cryptocurrency ecosystems. He has advised numerous clients on tax issues relating to token generation events, private token sales, NFTs, decentralized autonomous organizations (DAOs), and centralized and decentralized cryptocurrency structures. Sean's clients in this space include protocol development teams, founders, investment platforms, cryptocurrency exchanges, and individual investors.

Annette Nellen

Tax Program Director, San Jose State University

Annette Nellen, CPA, Esq. is a professor at San José State University teaching graduate level tax courses including tax research, property transactions, advanced individual tax, accounting methods, ethics, and tax policy. Annette is also director of SJSU's TEI-SJSU High Tech Tax Institute and Blockchain Tax Conference.

Annette is active in the tax sections of the AICPA (including former chair of the Tax Executive Committee and current chair of the Digital Assets Tax Task Force), ABA (chair of the Tax Policy & Simplification Committee), and California Lawyers Association. In 2023 she was appointed to the IRS Advisory Council (IRSAC) for a 3-year term, served as chair for 2024, and was reappointed in 2026 for a 4th year.

Annette is the recipient of the 2013 Arthur J. Dixon Memorial Award given by the Tax Division of the AICPA, the highest award given by the accounting profession in taxation. She was named to Accounting Today's 2024 & 2025 Lists of 100 Most Influential People in Accounting. Annette authors Bloomberg Tax Portfolio #533, Amortization of Intangibles, and Tax Analysts' Tax Notes State Moving Forward? column. She is co-author/co-editor of four tax textbooks from Cengage.

Prior to joining SJSU in 1990, Annette was with the IRS (Revenue Agent and lead instructor) and EY. Annette is a graduate of CSU Northridge (BS Accounting), Pepperdine University (MBA), and Loyola Law School (JD).

Erika Nijenhuis

Senior Counsel Office of Tax Policy, U.S. Treasury

Previously, Erika was a tax partner for many years at Cleary Gottlieb Steen & Hamilton, with a practice primarily focused on domestic and international tax issues with respect to financial instruments, global financial markets and multinational financial institutions. In 2009-2010, Erika served as Chair of the Tax Section of the New York State Bar Association.

Taylor Reid

Principal, Reid Tech Consulting

International tax advisor and independent consultant on digital asset and tax policy matters, with deep expertise in the tax treatment of software and digital assets. Visiting Scholar at Northwestern University Pritzker School of Law and co-author of the BNA Tax Management Portfolio on the Federal Taxation of Software and Digital Transactions. Formerly a tax partner with Baker McKenzie, advising clients in the software, blockchain, fintech and cloud computing industries on IP-driven international tax planning and structuring for over 30 years.

Jamison Sites

Principal, KPMG

Jamison Sites is a partner in the KPMG Business Tax Services (BTS) practice and focuses on serving clients with digital assets exposure.

With over 10 years of experience exclusively serving clients in the digital assets industry, Jamison is a recognized thought leader on blockchain and digital currency matters and has been an invited speaker by the U.S. Department of the Treasury and the Organisation of Economic Co-operation and Development. Jamison also assisted with the chartering of the first crypto banks by the Office of the Comptroller of the Currency.

Jamison holds a BSBA from the University of North Carolina at Chapel Hill Kenan-Flagler Business School, a J.D. from the University of North Carolina School of Law, an LL.M in Taxation from the Georgetown University Law Center, and an Executive Certificate in Strategy and Innovation from MIT Sloan School of Management.

Neil Thakur

Co-Founder & Managing Director, Teknos Associates

Neil Thakur is a Managing Director and founding member of Teknos Associates, where he leads the firm's digital asset and blockchain valuation practice. Teknos has operated in the digital asset sector for over a decade and is recognized as a global leader in the valuation of cryptocurrencies, tokens, and blockchain-based financial instruments.

Neil has overseen more than a thousand valuation analyses spanning blockchain networks, DeFi and staking assets, NFTs, real-world asset structures, digital asset treasuries, intellectual property, SAFTs, SAFEs, token warrants, and other token- and equity-linked instruments. Over the past decade, Teknos has worked with more than five hundred clients across the digital asset ecosystem. His work supports investment, financial reporting, tax, audit, and regulatory matters, advising crypto projects, investment funds, and regulators worldwide, including many of the industry's highest-market-cap token projects and leading digital asset venture funds.

He is a frequent speaker at blockchain and digital asset conferences and webinars and is a member of several industry associations. Neil has 25 years of experience in valuation, investment banking, venture capital, and corporate finance, holds a BA in Economics from Yale University, and is a Certified Valuation Analyst.

Yu-Ting Wang

Tax Partner, Dello PC

With more than 20 years of experience in public accounting, Yu-Ting Wang serves and advises a variety of clients, from privately-held business to high net worth individuals. She specializes in cryptocurrency and digital assets tax consultation, start-up advisory, tax planning and compliance for investment funds. She also has experience in cross border transactions and business succession planning. She works closely with financial advisors and estate planning attorneys to advise on family wealth transfer and general income tax planning.

Erik Weinapple

Principal, Baker Tilly

Professional Experience

Erik specializes in financial services, blockchain, cryptocurrency, fintech, and Real Estate. He works with venture capital funds, hedge funds, private equity, miners, token sales, alternative investment funds, and provides tax compliance and consulting services. Erik's focus is mainly on taxation of funds, businesses, partnerships and some high net worth individuals. He helps clients with onshore and offshore U.S. partnership tax filing requirements and issuance of K-1's. He also supports clients through IRS examinations, and has dealt with some of the first crypto related audits.

Prior Experience

Erik has over seventeen years of experience in public accounting, including working at Deloitte, a big 4 accounting firm. Erik has worked with Blockchain companies since the beginning of 2017 and has helped Venture Capital funds since 2007.

Selected Publications

- https://www.sfchronicle.com/business/networth/article/IRS-finally-weighs-in-on-cryptocurrency-taxes-14505101.php
- https://www.bizjournals.com/sanfrancisco/news/2019/06/01/what-business-leaders-need-to-know-about.html
- https://www.bizjournals.com/sanjose/news/2019/07/24/cryptocurrency-trends-that-bay-area-companies-need.html

Selected Speaking Engagements

Crypto Tax Guidance Update: What does this mean for you and your digital asset clients (Terrapin Accounting and Finance Show – October 20')

Professional Affiliations and Certifications

Member, Wall Street Blockchain Alliance

Education

BA, Economics w/emphasis Accounting, University of California Santa Barbara

Kale Wright

Partner, Overland Blockchain Group LLC

Kale Wright is a Partner at Overland Blockchain Group, where he advises blockchain-native and high-growth technology companies on digital asset accounting, financial infrastructure, and audit and tax-readiness.

With over a decade of experience in accounting and finance leadership, Kale specializes in helping complex organizations design scalable finance functions that stand up to regulatory scrutiny. His work spans blockchain, SaaS, and venture-backed technology companies, with a particular focus on digital asset reconciliation, subledger implementation, revenue recognition, and controls.

Prior to Overland, Kale was an Implementation Controller at Propeller Industries, where he led onboarding and implementation for more than 60 clients—with most in the blockchain industry. He worked directly with founders, CFOs, and finance teams to build accounting systems from first principles, including customized chart-of-accounts design, historical data remediation, ASC 606 revenue recognition, and accrual-based reporting. He also served as a primary resource for digital asset accounting, overseeing wallet reconciliations, crypto subledger implementations, cost-basis tracking, and audit support.

Earlier in his career, Kale served as Corporate Controller for a portfolio of tech companies, managing FP&A, budgeting, forecasting, financial operations, and executive reporting. Across his roles, he has supported and led numerous financial audits and routinely partners with tax, legal, and compliance stakeholders to ensure alignment between operational reality and regulatory requirements.

At the Blockchain Tax Conference, Kale brings a practitioner's perspective on how digital asset businesses can operationalize accurate accounting today to avoid tax, audit, and compliance issues tomorrow.

Christopher Wrobel

Special Counsel to the Associate Chief Counsel (Income Tax & Accounting), IRS

Christopher provides legal guidance to the Associate Chief Counsel (Income Tax & Accounting) ("IT&A") in the IRS National Office in matters pertaining to regulatory and other IRS published guidance projects within IT&A's jurisdiction. Prior to joining IT&A in 2014, Christopher served for eight years as an attorney with the IRS Office of Division Counsel (Large Business & International) in Washington, DC, where he was responsible for litigation and providing legal advice to the IRS during examinations of large taxpayers. In addition to his experience with the IRS Office of Chief Counsel, Christopher served as a law clerk to the Honorable Susan G. Braden of the United States Court of Federal Claims, and as an attorney at a Washington, DC law firm.

Thomas Zambito

Valuation Managing Director – Business and Intangible Assets, Baker Tilly

Thomas has provided valuation consulting services since 2000. His focus is business valuation, audit support, financial and tax reporting and analysis, and financial valuation modeling for clients in the technology, life sciences, financial services, and manufacturing industries.

Thomas's experience includes ASC 805 intangible asset valuations and purchase price allocation, ASC 350 goodwill impairment analyses, IRC 409A deferred compensation valuing common stock for privately held companies, pre-acquisition due diligence, and tax-related valuations.

He's also experienced in the valuations of developed and in-process research and development, trade names and trademarks, noncompetition agreements, customer relationships, loan portfolios, core deposit intangibles, fixed maturity deposits, interest rate swaps, and debt instruments.