

2024 Drake Software Update Schools

Keynote Speaker – Dallas, TX, and Charlotte, NC

Courtney will discuss the IRS Taxpayer Experience Office's role in enhancing customer interactions through collaboration and a customer-centric approach.



Courtney Kay-Decker
Deputy Chief Taxpayer Experience Officer
Internal Revenue Service

Courtney Kay-Decker is the Deputy Chief Taxpayer Experience Officer in the IRS Taxpayer Experience Office. In this role, she assists the Chief Taxpayer Experience Officer in ensuring all IRS interactions are enriched through a customer-centric approach.

Prior to her selection as the Deputy Chief Taxpayer Experience Officer in December 2022, Courtney served as an attorney in Davenport, Iowa, where her areas of practice included tax and administrative matters. From 2011 to 2019, she served as Director of the Iowa Department of Revenue. Additionally, she served as the first state co-chair of the Identity Theft and Tax Refund Fraud Information Sharing Analysis Center, a collaboration among the IRS, state tax agencies and industry partners who work to develop tools and protocols to detect and prevent identity theft tax refund fraud. She's also served as a Volunteer Income Tax Assistance site coordinator and as a member of the Electronic Tax Administration Advisory Committee.

Courtney received her B.A. in Economics from Northwestern and holds a J.D. with distinction from the University of Iowa College of Law where she also serves as an adjunct lecturer.



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Keynote Speaker – Franklin, NC, and Webcasts

Erin Collins, National Taxpayer Advocate and “Voice of the Taxpayer” before the IRS and Congress, will share her insight and latest updates on taxpayer and tax preparer matters with John Sapp, during this special segment recorded just for Drake Software users.



Erin Collins
National Taxpayer Advocate
Internal Revenue Service

Erin Collins is the “voice of the taxpayer” within the IRS and before Congress. She joined the Taxpayer Advocate Service (TAS) as the National Taxpayer Advocate (NTA) in March 2020 to advocate for taxpayers, protect their rights, and work toward improving the quality of taxpayer service and tax administration. In 2022, Erin was selected as one of the top 25 Most Powerful Women in the Accounting Profession by the American Institute of CPAs (AICPA) and CPA Practice Advisor magazine. In Oct. 2024 Erin received the Bruce I. Hochman Award from UCLA Extension Tax Controversy Institute. The award recognizes Collins’ outstanding proficiency in the field of tax law and her contributions as a dynamic leader.

Erin has more than 35 years of experience in tax law, spanning 15 years in the IRS Office of Chief Counsel and 20 years at the accounting firm of KPMG LLP, where she retired in 2019 as the Tax Managing Director in charge of its tax controversy practice for the Western region. At KPMG, Erin represented thousands of individuals, partnerships, small companies, and corporate taxpayers on technical and procedural tax matters. She represented clients in federal examinations and IRS appeals on domestic and international tax issues. She also has represented several clients before the U.S. Tax Court.



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Keynote Speaker – Atlantic City, NJ

Jamie will discuss the Coalition Against Scam and Scheme Threats (CASST) and how tax professionals can play a vital role in combating fraud and protecting their clients.



Jamie Shaw

**Project Director: Communications and Liaison
Internal Revenue Service**

Jamie is a Project Director with the IRS Communication and Liaison Office, where she oversees initiatives aimed at combating scams and schemes targeting taxpayers. With over 28 years of experience in protecting taxpayers and tax professionals from identity theft, Jamie has recently focused her efforts on addressing the growing threat of scams. She recently brought together leaders from across the tax industry to launch the Coalition Against Scam and Scheme Threats (CASST). CASST's mission is to collaborate in the fight against scams and provide support to those who have been victimized.

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Keynote Speakers – Las Vegas, NV

Derek Ganter, Director of IRS Stakeholder Liaison Division, and Marc Zine, Project Manager Communications and Liaison, will explain how the Inflation Reduction Act is transforming IRS services for tax professionals, covering updates on transformation efforts, Stakeholder Liaison roles, and new features of the Tax Pro Account. (Las Vegas location)



Derek Ganter
Director of IRS Stakeholder Liaison Division
Internal Revenue Service

Derek Ganter is currently the Director of the Stakeholder Liaison organization within the Internal Revenue Service. In this capacity, Derek oversees non-case related engagement with the local, state and regional payroll, tax practitioner and non-tax/industry stakeholders. The scope of his purview includes national outreach and education of IRS policies, practices and procedures to ensure compliance with the tax laws, both by voluntary means and through enforcement programs.

Prior to his current assignment Derek held a variety of positions of increasing responsibility and scope primarily in the IRS Compliance Business Units. Recent assignments include serving as a:

- Bank Secrecy Act/Title 31 Specialist in the designated High Intensity Financial Crimes Area of Miami, Florida,
- Holding various management and non-management compliance positions in the IRS's Examination function in the Small Business/Self-Employed and Large & Mid-Size Business Divisions,
- Assignments to the IRS Communications, Problem Resolution and Disaster Assistance programs, as well as
- Leading several task forces, special projects and teams

Derek has been recognized and received commendations by former IRS Commissioner Charles Rossotti, the American Institute of CPA's, members of the U.S. Congress and other noteworthy institutions for his tax law knowledge, communication skills and ability to find resolution to difficult and sensitive matters.

A native Californian, Derek attended the University of California at Santa Barbara where he was recruited by and began his IRS career in 1989.

In his private life serves on the leadership team of several non-profit organizations and enjoys mentoring student athletes, fishing and playing board games.



Marc Zine
Project Manager: Communications and Liaison
Internal Revenue Service

Marc Zine is currently the national project manager for the Stakeholder Liaison branch in IRS Communications & Liaison. Marc develops and implements Stakeholder Liaison's outreach strategies for various key messages targeted to specific stakeholder segments, analyzes performance data and reports business results, and develops guidance, resources and technology to support the entire organization.

Previously, Marc managed the Service's relationships with the leading tax professional membership organizations in California and Nevada. He also collaborated with industry and trade associations in conjunction with other Federal, State and local government agencies to deliver IRS key messages, and other outreach and education programs. He has also worked for the IRS as a Revenue Officer, Revenue Agent and an Appeals Officer.