Commonwealth of Massachusetts

Travel Authorization Form (TAF)

1. Date of Request	2. Travel Request #	3. Department/Division	4. DEPT/ORGN:	5. Appropriation #
04/24/26		Department of Revenue/Tax Administration		

6. Name of Traveler	7. Title	8. Dates of Travel
Craig Bolio	Associate Deputy Commissioner	From: 06/07/26 To: 06/10/26

9. Travel Itinerary and Justification

Federation of Tax Administration Annual Conference 2026 in Nashville

https://taxadmin.org/events/fta-annual-meeting-2/

Attached supporting documentation (conference agendas, brochures, etc.)

10. Expenses

	Personal Funds	MA State Funds	Federal Funds	Other (describe in #12)
Transportation: (check all that apply) ☐ Rail ☑ Bus ☑ Airfare ☐ Car: ☐ State ☐ Personal ☐ Rental ☑ Taxi ☐ Other:		$ 550.00		
Lodging: Loews Nashville Hotel 3 nights		$ 767.55		
Meals:		$ 177.00		
Other: (please list): Registration Fee		$ 895.00		
Subtotal	$ 0.00	$ 2,389.55	$ 0.00	$ 0.00

Grand Total: $ 2,389.55

11. Certifications and Authorizations (See G.L. c. 30, §25B)

I hereby certify under the pains and penalties of perjury that, to the best of my knowledge, the above information is true and correct.

Signature of Traveler: C Bolio Craig Bolio — Date: 04/24/26

I hereby certify that sufficient funds are available for the above described travel accommodations.

Signature of Agency CFO: Timothy Rooney — Date: 05/04/2026

I hereby authorize the anticipated travel described above and related expenses listed in this form. Signature of Traveler's Appointing Authority: Sharen Brown Title: Sr. Deputy Commissioner Tax Administration 4/24/26 — Date

I hereby authorize the anticipated travel described above and related expenses listed in this form.

Signature of the Traveler's Cabinet Secretary: Matthew J. Gorzkowicz — Date: 5/27/2026

12. Travel Funded By Private Entity, Foreign Government Entity, or Federally Recognized Tribe:

Travel Funded By Private Funds: ☐Yes ☐No

If Yes: $_____ Source (Contact Information):_____

TRAVEL FUNDED BY PRIVATE SOURCES MUST BE DISCLOSED TO AND AUTHORIZED BY APPOINTING AUTHORITY PURSUANT TO 930 CMR 5.08 (2)(d)(1). FOR THE APPROPRIATE FORM GO TO: https://www.mass.gov/disclosure-forms

13: Upon final approval, the Cabinet Secretary shall ensure that a copy of this form is distributed to:

☐ **A&F Budget Director & The Office of the Comptroller (please check once complete)**

Craig Bolio

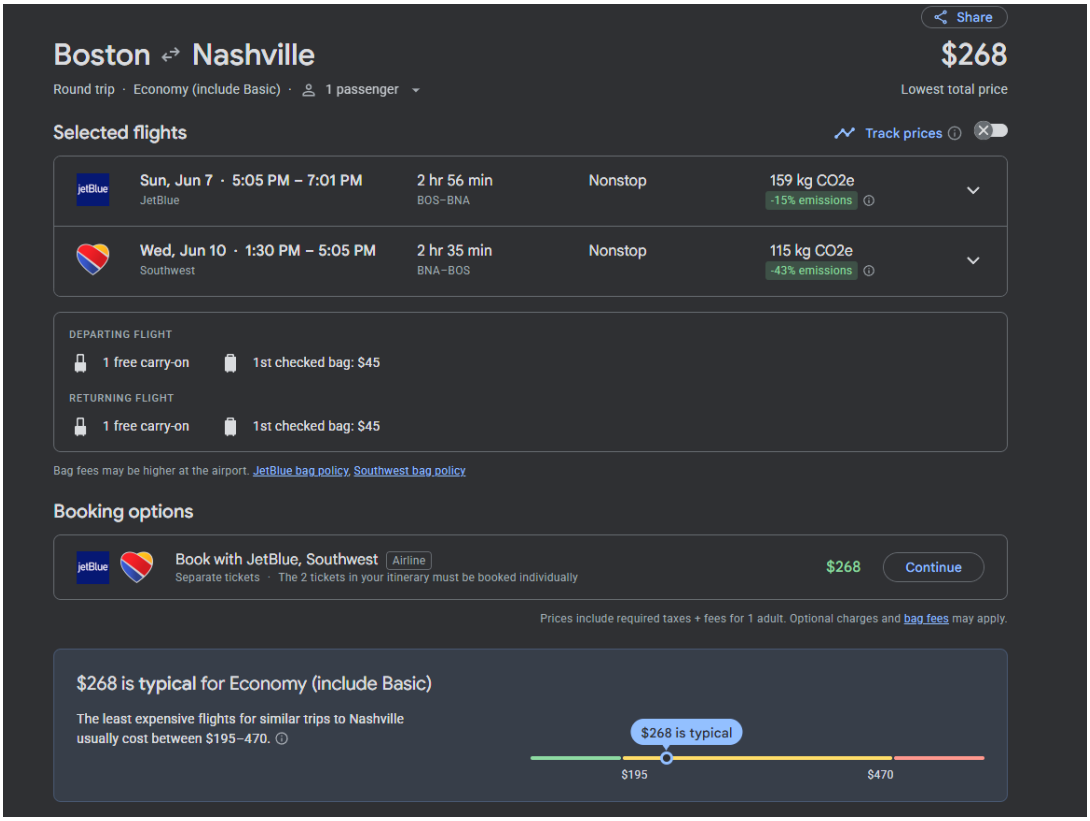
FTA Annual Nashville Tenn June 7-10, 2026

Registration Fee: $895.00

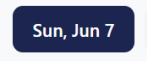
Hotel: 3 nights $767.55



Flight $268 Round Trip



Agenda:



6:00 PM
8:00 PM

Welcome Networking Reception

Networking Symphony Ballroom

Mon, Jun 8

9:00 AM
9:05 AM
Welcome to Nashville
General SessionSymphony Ballroom

9:05 AM
9:15 AM
Welcome to FTA Annual
Sharonne Bonardi, Vernon Barnett
General SessionSymphony Ballroom

9:15 AM
10:15 AM
Fiercely Joyful Leadership in a High-Pressure World: A Practical Framework for Sustaining Culture, Performance, and Trust
Natasha "Tash" Durkins
General SessionSymphony Ballroom
Show details

10:15 AM
10:35 AM
Morning Break
BreakSymphony Ballroom

10:35 AM
11:25 AM
Updates from the IRS
Ken Corbin, Courtney Kay-Decker
General SessionSymphony Ballroom

11:25 AM
12:00 PM
Presentation of the 2026 FTA Awards
Sharonne Bonardi, Vernon Barnett
General SessionSymphony Ballroom
Show details

12:00 PM
1:20 PM
Meal

Details available soon

1:20 PM– 2:10 PM(4 concurrent sessions)

1:20 PM – 2:10 PM

Sponsor Series Session 1

Sponsor SeriesOcean Way
Show details

1:20 PM – 2:10 PM

Low-Income Tax Clinics: A collaborative success story
Ryan Froman, Rachael Shaw, Jacob Brandt, Amy Feinberg
LegalLyric

1:20 PM – 2:10 PM

State Revenue Trends - a NASBO Briefing
Kathryn Vesey White
Partner AssociationSound Emporium A/B
Show details

1:20 PM – 2:10 PM

Breakout

Details available soon

2:10 PM
2:15 PM
Travel Break
BreakSymphony Ballroom Foyer
2:15 PM– 3:05 PM(4 concurrent sessions)

2:15 PM – 3:05 PM

Sponsor Series Session 2
Sponsor SeriesOcean Way
Show details

2:15 PM – 3:05 PM

Alternative Apportionment: When is it Appropriate, and Why
Bruce Fort, Jeff Foster
LegalLyric

2:15 PM – 3:05 PM

100 Years of FTA Excise Tax Programs: Where we've been and where we're going
Kevin Richard
Excise TaxMelody

2:15 PM – 3:05 PM

NASCIO: AI in Action Across the States: Applications, Solutions and Innovation
Doug Robinson
Partner AssociationSound Emporium A/B
3:05 PM
3:15 PM
Travel Break
BreakSymphony Ballroom Foyer
3:15 PM– 4:05 PM(4 concurrent sessions)

3:15 PM – 4:05 PM

Sponsor Series Session 3
Sponsor SeriesOcean Way
Show details

3:15 PM – 4:05 PM

Operations Leaders Panel
Andrew Stein, Mark Ashworth, Craig Bolio, Maria Guerra Lapacek
TechSound Emporium A/B
Show details

3:15 PM – 4:05 PM

Agency AI Policy: From Ideas to Implementation
Kevin Milligan, Anne Cram, Morgan Zimmerman, Patric Starr, Ananias Williams
LegalLyric
Show details

3:15 PM – 4:05 PM

Goooooooaaaaaaalllllll! World Cup Impacts on Tax Revenues and Administration
Kathleen McColgan, Marita Sciarrotta
BreakoutMelody
Show details
4:05 PM
4:10 PM
Travel Break
BreakSymphony Ballroom Foyer
4:10 PM– 5:00 PM(4 concurrent sessions)

4:10 PM – 5:00 PM

Sponsor Series Session 4
Sponsor SeriesOcean Way
Show details

4:10 PM – 5:00 PM

Beware: AI Is Driving the Tax Gap
Josh Sandler
TechSound Emporium A/B
Show details

4:10 PM – 5:00 PM

Criminal Tax Investigations: Essential to Long-term Voluntary Compliance
John Fowler, Nina Olson
LegalLyric

4:10 PM – 5:00 PM

Breakout

Details available soon

5:00 PM
6:00 PM
Networking Reception
NetworkingSymphony Ballroom Foyer
Show details

Tue, Jun 9

9:00 AM
9:05 AM
Welcome to Day 2
David Harris
General SessionSymphony Ballroom
9:05 AM
9:55 AM
Economic Update
Emily Mandel
General SessionSymphony Ballroom
Show details
9:55 AM
10:10 AM
Morning Break
BreakSymphony Ballroom
10:10 AM
11:00 AM
Predictive Markets: Want to Wager Whether This Commodity Has State Tax Implications?
Sanam Hooshidary, Brian Kane, Michael Meredith
General SessionSymphony Ballroom
11:00 AM

12:00 PM
The Good, Bad, and Funny: Developments in SALT Litigation
Brian Oliner, Jeffrey Friedman, Lila Disque, Richard Pomp, Jim Eads
General SessionSymphony Ballroom
12:00 PM
1:20 PM
Lunch on Your Own
MealSymphony Ballroom
Show details
1:20 PM– 2:10 PM(4 concurrent sessions)

1:20 PM – 2:10 PM

Sponsor Series Session 5
Sponsor SeriesOcean Way
Show details

1:20 PM – 2:10 PM

State Legislative Update
Zach Wyatt, Amber Egbert, Brian Wanko
LegalLyric

1:20 PM – 2:10 PM

Audit

Details available soon

1:20 PM – 2:10 PM

Comms Panel
Kinsey Woodson, Kelly Cortesi, Dia Harris, Emily Cassulo
BreakoutMelody
2:10 PM
2:15 PM
Travel Break
BreakSymphony Ballroom Foyer
2:15 PM– 3:05 PM(4 concurrent sessions)

2:15 PM – 3:05 PM

Sponsor Series Session 6
Sponsor SeriesOcean Way
Show details

2:15 PM – 3:05 PM

Federal Legislative Update
Brian Oliner, Sanam Hooshidary
LegalLyric

2:15 PM – 3:05 PM

UX Design for Citizen-used Government Tools
Frank Nestore, Suzanne Chapman
TechMelody

2:15 PM – 3:05 PM

Breakout

Details available soon

3:05 PM
3:15 PM
Travel Break
BreakSymphony Ballroom Foyer
3:15 PM– 4:05 PM(4 concurrent sessions)

3:15 PM – 4:05 PM

Audit

Details available soon

3:15 PM – 4:05 PM

Sponsor Series Session 7
Sponsor SeriesOcean Way
Show details

3:15 PM – 4:05 PM

Show me the Money (and the 1099) - NIL's implications in State Tax Administration
Brian Oliner, Luke Morris
LegalLyric
Show details

3:15 PM – 4:05 PM

Breakout

Details available soon

4:05 PM
4:10 PM
Travel Break
BreakSymphony Ballroom Foyer
4:10 PM– 5:00 PM(4 concurrent sessions)

4:10 PM – 5:00 PM

Sponsor Series Session 8
Sponsor SeriesOcean Way
Show details

4:10 PM – 5:00 PM

State Sovereignty: Defining and Defending It
Bruce Fort
LegalLyric

4:10 PM – 5:00 PM

Strategy

Details available soon

4:10 PM – 5:00 PM

Breakout

Details available soon

5:30 PM
8:00 PM
FTA Banquet at the Musicians Hall of Fame
NetworkingMusicians Hall of Fame and Museum

Wed, Jun 10

8:30 AM
9:00 AM
FTA Annual Business Meeting (FTA Member Representatives Only)
Vernon Barnett

Business MeetingSymphony Ballroom

9:00 AM

10:00 AM

How Top Executives are Learning about GenAI

Alex Denniston

KeynoteSymphony Ballroom

10:00 AM

10:30 AM

Developing Assistive AI for FTA Information Access

Ryan Minnick, Abhishek Misra, Scott Graham

General SessionSymphony Ballroom

10:30 AM

10:50 AM

Morning Break

BreakSymphony Ballroom

10:50 AM

11:40 AM

General Session