Commonwealth of Massachusetts

Travel Authorization Form (TAF)

1. Date of Request	2. Travel Request #	3. Department/Division	4. DEPT/ORGN:	5. Appropriation #
07/16/2026	1	Massachusetts Department of Revenue		

6. Name of Traveler	7. Title	8. Dates of Travel
Reem Hanna Abraham Georgiopoulos	Director of Business Innovation	From:08/02/2026 To: 08/06/2026

9. Travel Itinerary and Justification

026 FTA Technology Conference
August 2–5, 2026 · St. Louis Union Station, St. Louis, MO..\OneDrive - Commonwealth of Massachusetts\I Drive\Tax Admin\Anaylitcs & Innovation New Group\TAF\New folder\Agenda - 2026 FTA Technology Conference.pdf

RACC
August 5–6, 2026 · St. Louis Union Station, St. Louis, MO..\OneDrive - Commonwealth of Massachusetts\I Drive\Tax Admin\Anaylitcs & Innovation New Group\TAF\New folder\2026_RACC_Agenda.01.pdf

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:		$875.80		
Lodging: Fairfield Inn & Suites by Marriott St. Louis Downtown		$ 683.64		
Meals: Food (Meal reimbursements Managers: $59 day)		$295.00		
Other: (please list): Registration Fee for FTA & RACC		$975.00		
Subtotal	$ 0.00	$2,819.44	$ 0.00	$ 0.00

Grand Total: $ 2,819.44

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: *Reem Georgiopoulos* Date 07/22/2026

I hereby certify that sufficient funds are available for the above described travel accommodations.
Signature of Agency CFO *Timothy Rooney* Date 07/27/2026

I hereby authorize the anticipated travel described above and related expenses listed in this form.
Signature of Traveler's Appointing Authority: Title: Associate Deputy Commissioner of Tax Administration Date 07/22/26

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: 7/28/2026

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

Expedia

Hello, Reem

Free cancellation if plans change
There's no fee to cancel within 24 hours of booking.

Roundtrip flight

Boston (BOS) to St. Louis (STL)

Sun, Aug 2
2:15pm - 4:05pm (2h 50m • nonstop)
Southwest Airlines

Flight details

St. Louis (STL) to Boston (BOS)

Thu, Aug 6
7:00pm - 10:30pm (2h 30m • nonstop)
Southwest Airlines

Flight details

Price details

Flight	**$775.80**
Base fare	$693.02
Taxes & fees	$82.78
Total (USD)	**$775.80**

Who's flying?

* Required

Names must match government-issued photo ID

Select traveler *
Reem Georgiopoulos

First name *
Reem

Middle name

Last name *
Georgiopoulos

Gender *

Male Female

Date of birth *

Month
Month

Day
DD

Year
YYYY

Phone country/region *
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Phone number *

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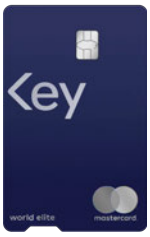

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*after qualifying purchases. Terms apply.

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You pay $775.80
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Total after statement credit $675.80

Get started

Check if you're approved with no impact to your credit.

Payment details

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Reem Georgiopoulos

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Expiration date *
MM/YY

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CVV

Save this card for future use

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Select an option to continue *

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- Trip delay up to $500 per person
- Baggage loss up to $1,000 or baggage delay up to $500 per person
- Medical expenses up to $25,000 per person

View benefit summaries

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I'm willing to risk my $775.80 non-refundable flight.

52,000+ travelers protected their flight on Expedia last week.

CDC, Nov 2022

"Before you travel, consider getting travel insurance to cover yourself in case delays, accidents, or illness occur on your trip."

The cost of this plan includes travel insurance and assistance services. View insurance details and disclosures

Rules & restrictions

✓ Free cancellation within 24 hours of booking!

- **Tickets are non refundable, non transferable, and name changes are not allowed.** Southwest will however, issue Southwest flight credits for non refundable flights as long as the flight is canceled at least 10 minutes prior to the scheduled departure of your flight. Please contact Southwest directly for any same-day cancellations. Failure to cancel a reservation at least 10 minutes prior to scheduled departure of your flight may result in Southwest applying their No-Show policy and forfeited travel funds. Flight credits are non-transferable. However, if you have booked a **Choice** fare (as indicated in the booking process) any credit issued by Southwest in relation to this cancelled flight will be permitted to be transferred to another customer (only one transfer permitted).
- If you have booked a Choice fare (as indicated in the booking process) Southwest allows you, on the day of travel, to switch free of airline charges to another flight with space available departing on the same calendar day between the same origin airport and destination airport as your original flight. For same-day change, you must change your flight at least 10 minutes prior to the scheduled departure of your original flight or Southwest No-Show policy will apply. You will be required to pay any government taxes and fees

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Expedia

Receipt

Expedia itinerary: [redacted]

Purchase date: Jul 17, 2026

Booking details

Fairfield Inn & Suites by Marriott St. Louis Downtown

2144 MARKET STREET, St. Louis, MO, 63103 United States of America

Check in: Aug 2, 2026

Check out: Aug 6, 2026

1 room x 4 nights

Room, 1 King Bed

Booked for: Reem Georgiopoulos

Payment details

Room price

Sun, Aug 2	$177.65
Mon, Aug 3	$126.65
Tue, Aug 4	$126.65
Wed, Aug 5	$143.65
Taxes	$109.04

Total **$683.64**

Pay at property

how much will it estimated cost to pick at

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AI Overview

A taxi ride or rideshare from St. Louis Lambert International Airport (STL) to the Fairfield by Marriott Inn & Suites St. Louis Downtown (located about 12 miles away) will cost roughly **$35 to $45** <Quote>“Take the taxi from St. Louis Airport (STL) to Courtyard by Marriott St. Louis Downtown West, Saint Louis... $35–45.”</Quote> as noted by Rome2Rio. For rideshares like Uber, the average is around **$43** <Quote>“The average price for this trip is $43.”</Quote> according to Uber.

If you are looking for a cheaper option, you can take the **MetroLink (Red Line)** directly from either Terminal 1 or Terminal 2 at STL. The ride takes about 30 to 40 minutes to get to the Civic Center Station, and train tickets are just **$3** <Quote>“Metro St. Louis operates a train from LAMBERT AIRPORT TERMINAL #1 station to CIVIC CENTER station every 20 minutes. Tickets cost $3 and the journey takes 31 min.”</Quote> cited by Rome2Rio.

If you'd like, tell me:

- What **day and time** you will be arriving
- **How many people** are in your group

I can help you decide if a rideshare split is better than the train!

Marriott

Fairfield Inn & Suites St. Louis Downtown - Marriott

Does Fairfield by Marriott Inn & Suites St. Louis Downtown allow pets? No, pets are not allowed at Fairfield by Marriott Inn & Sui...



Rome2Rio

Courtyard by Marriott St. Louis Downtown West, Saint ... - Rome2Rio

Select an option below to see step-by-step directions and to compare ticket prices and travel times in Rome2Rio's travel planner. ...



Show all

Ask anything

Rome2Rio
https://www.rome2rio.com › St-Louis-Airport-STL › Fa...

St. Louis Airport (STL) to Fairfield Inn and Suites by Marriott ...

The cheapest way to **get** from **St**. **Louis Airport** (**STL**) to **Fairfield Inn** and **Suites by Marriott St Louis Downtown**, Saint **Louis costs** only $2, **Average** Duration $3 ...

Missing: ~~pick~~ | Show results with: pick

People also ask

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Does the Marriott St. Louis Grand have an airport shuttle?

How much is the train from St. Louis Airport to downtown?

Rome2Rio
https://www.rome2rio.com › Train › Fairfield-Inn-and-...

St. Louis Airport (STL) to Fairfield Inn and Suites by Marriott ...

Train tickets from St. Louis Airport (STL) to Fairfield Inn and Suites by Marriott St Louis Downtown, Saint Louis **start at $3**, takes 31 min. take on average 31 ...

Missing: ~~pick~~ | Show results with: pick

TaxiFareFinder
https://www.taxifarefinder.com › %252520Suites%2525...

Taxi Price Estimator & Cost Calculator: St. Louis, MO

Whether you're planning a night out or need a reliable ride to explore the city's attractions, our calculator provides quick and accurate Taxi fare **estimates**. Read more

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https://www.expedia.com/st_louis/oneway

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Quick Booking Confirmation — Compare One-Way Rental Cars in **St**. **Louis**, Missouri. View Deals and Reserve Now on Expedia. Filter by Car Type, Expedia Discount Type, Capacity, Cancellation Policy. See Packages. Secure Booking.

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Marriott
https://www.marriott.com › USA › Missouri › St Louis

Fairfield Inn & Suites St. Louis Downtown

Self parking **is** available at **Fairfield** by **Marriott Inn** & **Suites St**. **Louis Downtown**, with rates of $15.00 per hour, and $25.00 per day. View additional parking ... Read more

4.4 (669) · Price range: $ Rates Vary (Book Directly with Marriott Bonvoy to Get the Best Rates)

Missing: ~~estimated~~ ~~pick~~

Expedia
https://www.expedia.com › ... › Missouri › St. Louis Hotels

Fairfield Inn & Suites by Marriott St. Louis Downtown

The **price is** $122 · **prices** found for a 1-night stay for · start from $160, including taxes and **fees**. Self parking **is** available for USD 25 per day.

9.2/10 (1,005) · Price range: See our site for deals tailored to your travel dates

Missing: ~~estimated~~ ~~pick~~

Rome2Rio
https://www.rome2rio.com › St-Louis-Airport-STL

Fairfield Inn and Suites by Marriott St Louis Downtown ...

Fairfield Inn and **Suites by Marriott St Louis Downtown**, Saint **Louis** to **St**. **Louis Airport** (**STL**) **costs** only $2, Weekly Services 47 minAverage Duration $3Cheapest ...

Missing: ~~pick~~ | Show results with: pick

KAYAK
https://www.kayak.com

KAYAK: Search Flights, Hotels & Rental Cars

KAYAK searches hundreds of other **travel** sites. **Fairfield** by **Marriott Inn & Suites** Seattle Sea-Tac **Airport**$132+. North **Airport**$57+. **Field Airport**$57+

ShuttleFare.com
https://www.shuttlefare.com › st_louis_lambert_airport_...

STL Airport Shuttle: Shared, Private, Hotel, and Direct ...

Hotel shuttles and public transit usually set the low end of the **cost** range. Shared **airport** shuttles sit in the middle. Private cars, taxi, and direct rideshare ... Read more

Chesterfield Taxi & Car Service
https://www.chesterfieldtaxi.com › Home › Rates

Lambert Airport Rates

Lambert Airport Rates · Drury Plaza-Chesterfield: $48 · Hyatt Place-Chesterfield: $48 · Spirit Airport-Chesterfield: $62 · Most Downtown Hotels: $40 · Chase Park ... Read more

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Register

2026 FTA Technology Conference

Sunday, August 2, 2026 – Wednesday, August 5, 2026

St. Louis Union Station — St. Louis, MO

Register Now

Already registered? Sign in

Overview Pricing Agenda Speakers Sponsors Hotel Venue

Technology Innovation for Tax Administration

Join tax technology leaders from across the country for four days and more than 40 hours of cutting-edge solutions, strategic insights, and hands-on learning designed specifically for tax administration professionals. This premier conference brings together IT directors, tax administrators, and technology vendors to explore the latest innovations transforming how tax agencies serve taxpayers and modernize operations.

Attendees will dive deep into emerging technologies including artificial intelligence, cloud migration strategies, cybersecurity frameworks, and digital transformation initiatives that are

and strengthen data security.

Network with peers facing similar challenges, learn from successful implementations across different jurisdictions, and discover proven strategies for managing technology projects in the public sector. Whether you're planning a system modernization, evaluating new tools, or seeking to optimize existing technology infrastructure, this conference provides the insights and connections needed to drive successful outcomes for your agency.

WHEN
Sunday, August 2, 2026 – Wednesday, August 5, 2026
Central Daylight Time (CDT)

WHERE
St. Louis Union Station
St. Louis, MO 63103

Registration Pricing

All registrations include access to the full conference and exhibit hall, with the exception of government-only sessions noted on the agenda.

FTA member agencies receive one free registration for every three paid; if you register all four at the same time, the discount automatically applies. If you need assistance, contact darrell.reeves@taxadmin.org

If you wish to register a spouse, partner, or adult child as a guest for networking events and receptions, please contact us.

Government Attendee

Non-Government Attendee

Private sector attendees.

Booth Worker

Additional Booth Staff for Exhibitors - Does not

Register

$875

Register

Register

$350

Register

Conference Agenda

Explore the full schedule of sessions and events

All times shown in **Central Daylight Time (CDT)**

Download agenda (PDF)

For reference (e.g. travel requests). The live agenda below is always current.

Sun, Aug 2 | Mon, Aug 3 | Tue, Aug 4 | Wed, Aug 5

3:00 PM
7:00 PM

Conference Registration — Show details

Registration · Depot Registration Office

6:00 PM
8:00 PM

Welcome Networking Reception in the Grand Hall — Show details

Networking · Grand Hall

Confirmed Speakers

Learn from leading experts in tax administration

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- Mathtech, Inc.
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- Revenue Solutions, Inc.
- ScaleCapacity Inc.
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Register

Hotel Accommodations

St. Louis Union Station Hotel – Your Historic Home Base in St. Louis, MO | **Booking Deadline EXTEDNED to July 15, 2026**

Stay in the heart of St. Louis at the legendary Union Station Hotel, where history, innovation, and comfort come together to create an unforgettable experience for conference attendees. Just minutes from the conference venue, Union Station Hotel offers the perfect blend of convenience, character, and modern amenities to make the most of your time at the conference.

Surrounded by St. Louis's vibrant dining, attractions, and iconic Gateway Arch, Union Station Hotel provides a one-of-a-kind setting to relax, recharge, and connect with fellow attendees—all within a beautifully restored 19th-century train terminal.

Why Stay at Union Station Hotel?

- Prime Location: Centrally situated in St. Louis with easy access to the conference venue and the city's top attractions.
- Inspiring Atmosphere: Immerse yourself in the hotel's stunning Grand Hall, with its soaring vaulted ceilings and rich railroad heritage that echo the spirit of innovation driving our conference theme.
- Modern Comforts: Enjoy well-appointed rooms, high-speed Wi-Fi, a fitness center, an indoor pool, and a variety of on-site dining and entertainment options.
- Dining & Networking: Meet up with colleagues at one of the hotel's signature restaurants and bars, or explore the lively Midtown and downtown St. Louis food scene just outside the door.

Register

$150

per night, plus applicable taxes and fees

Book Now

$219

per night, plus applicable taxes and fees

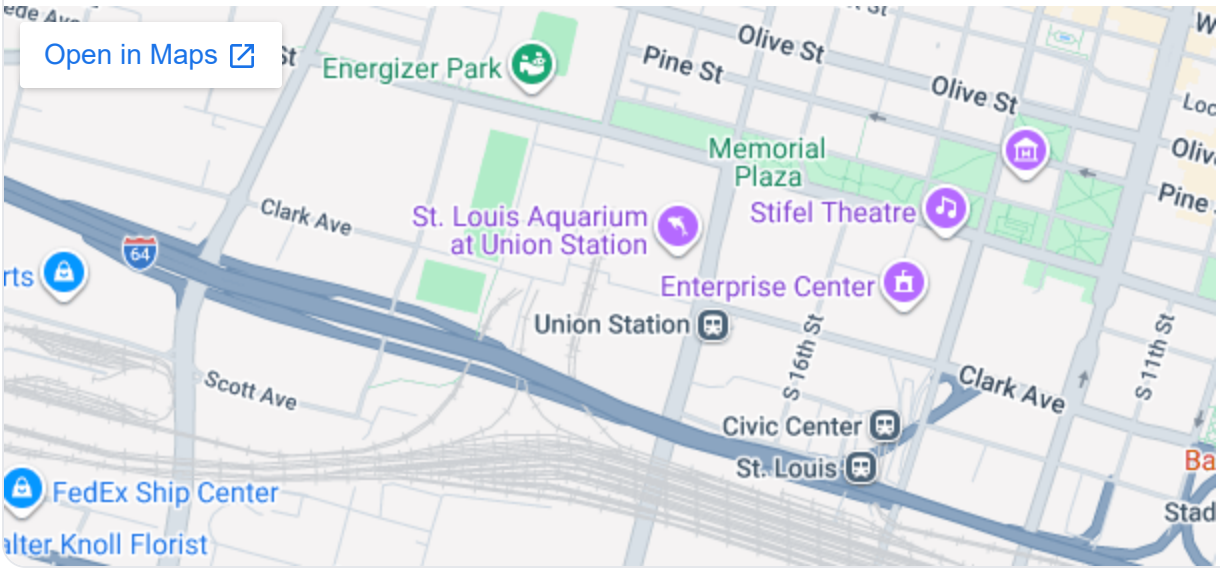
Book Now

Venue

St. Louis Union Station

1820 Market St
St. Louis, MO, 63103

Get Directions



Register

See You Soon!

2026 FTA Technology Conference begins in

10	15	54	01
DAYS	HOURS	MINUTES	SECONDS

Don't wait — spots are filling up

Register Now

Already registered? Sign in

444 North Capitol St NW, #348
Washington, DC 20001

taxadmin.org

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Reg: Customer Conference - Reem Georgiopoulos

Guest User 22-Jul-2026

This registration still needs to be submitted.

2026 RACC Registration

✓ Introduction ✓ Registration ✓ Guest Registration ✓ Lodging

The event fee is: **$100.00**

Payment Method

Required

Please contact the FAST Conference team at Conference@FastEnterprises.com for questions or concerns. Thank you!

Cancel Save Draft Previous Submit

Conference Agenda

2026 FTA Technology Conference

August 2–5, 2026 · St. Louis Union Station, St. Louis, MO

For reference only — agenda as of July 16, 2026. The schedule is subject to change; the current agenda is always available on the event website: **https://hub.taxadmin.org/e/tech-conference-2026#agenda**

SUNDAY, AUGUST 2, 2026

3 PM – 7 PM

3 PM – 7 PM

Conference Registration

Registration will be available during the below times:

- Sunday from 3 to 7 p.m.
- Monday and Tuesday opening at 7:30 a.m.

Depot Registration Office · 240 min

6 PM – 8 PM

6 PM – 8 PM

Welcome Networking Reception in the Grand Hall

While we wait for the FTA Tech Express to pull into the station, enjoy our welcome reception in the main Grand Hall of St. Louis Union Station. Get to know your fellow attendees at the welcome networking reception. Refreshments and light bites will be served.

Grand Hall · 120 min

MONDAY, AUGUST 3, 2026

7:30 AM – 9 AM

MIDWAY WEST	REGENCY A
Breakfast Start your day off with a hot breakfast buffet. 7:30 AM – 9 AM · 90 min	*Technology and Operations Leader Breakfast* This government-only breakfast is for Technology and Operations Leaders (title equivalents of Commissioner, COO, CIO, CISO, or platform/ITS director). If you are unsure if you should attend, email ryan.minnick@taxadmin.org 7:30 AM – 9 AM · 90 min

FOR REFERENCE ONLY
Agenda as of July 16, 2026

9 AM – 12 PM

9 AM – 9:10 AM

Welcome to FTA Tech 2026

Ryan Minnick

Grand DEF · 10 min

9:10 AM – 10 AM

Time Shift: The 1926 World Series, Technology Changes, and Future Lessons

Terry Lemons, long-time IRS communications director, explores the classic 1926 World Series between his hometown Cardinals and the New York Yankees — and the championship's continuing effect on the city and baseball. A century ago, technology changes touched everything from communications to transportation, creating a ripple in time that continue to be felt across society. Now, more changes loom that will alter the nation's landscape. This session - taking place in historic Union Station where scenes from the 1926 World Series played out - will build off Terry's unique background as an IRS executive, newspaper reporter and baseball fan. He'll discuss the past, present and future through the lens of 1926 as he looks at implications for the tax community and government leaders.

Terry Lemons

Grand DEF · 50 min

10 AM – 10:20 AM

Coffee Break

Network with your fellow attendees at our morning coffee break.

Grand DEF · 20 min

10:20 AM – 10:30 AM

Welcome to Missouri

Missouri Governor Kehoe will provide welcoming remarks to conference attendees, highlighting the state's commitment to advancing tax administration technology and fostering collaboration among state and local tax agencies.

Hon. Mike Kehoe

Grand DEF · 10 min

10:30 AM – 11:30 AM

The Dark Side of Innovation: How Criminals are Leveraging Advanced Technology

This session examines how criminals are exploiting artificial intelligence, vast data repositories, and sophisticated technological tools to target tax systems and government agencies. Speakers will analyze emerging criminal methodologies and discuss how tax administrators can collaborate with each other and private sector partners to develop countermeasures that stay ahead of evolving threats in the digital landscape.

David Maimon, Ryan Minnick

Grand DEF · 60 min

11:30 AM – 12 PM

Why and How Did FTA Build a Member Chatbot?

Scott Graham, Ryan Minnick, Abhishek Misra

Grand DEF · 30 min

12 PM – 1:30 PM

12 PM – 1:30 PM

Lunch on Own

Offsite · 90 min

FOR REFERENCE ONLY
Attendees as of July 16, 2026

1:30 PM – 2:30 PM

GRAND A

How data analysts solve Big Data questions in Taxation - Part 1: Technical Application of Concepts

Data

This session is a discussion of the application and review of examples of technology agnostic applications of analytics concepts including population analysis, predictive models, fuzzy matching for similarity, automated feedback loops and more. We will discuss how to integrate third party analytics tools with tax administration systems, how to keep proper logs for auditing, and how to measure and discuss risk.

Rahul Sarathy

1:30 PM – 2:30 PM · 60 min

GRAND B

Cyber Readiness in Action: Preparing Government Agencies for Evolving Threats

As cyber threats grow in sophistication, government agencies must go beyond compliance to achieve true cyber readiness. This session offers practical insights into strengthening your agency's security posture—covering proactive risk assessment, incident response planning, cross-agency coordination, and resilience-building. Learn from real-world examples and discover actionable strategies to stay ahead of the evolving threat landscape while protecting critical systems and taxpayer data.

1:30 PM – 2:30 PM · 60 min

GRAND C

Taxing Crypto: A Hands-On Case Investigation Workshop

Crypto

Crypto represents a rapidly growing—and largely untapped—state tax base. As activity expands across decentralized and cross-jurisdictional environments, state tax authorities face a fundamental challenge: How do states act on federal leads, independently identify high-risk activity among state residents, and determine how crypto-related income should be attributed and apportioned across jurisdictions?

If your agency is looking to better understand, identify, or work crypto tax cases, this hands-on workshop is designed for you.

Participants will learn:

- How income is generated across the crypto ecosystem (trading, staking, DeFi, gaming)
- Where state-level tax exposure exists—and how it's often missed
- The methods used to attribute fragmented on-chain activity to real-world taxpayers
- How crypto-related income can be sourced and apportioned across jurisdictions
- How to prioritize and work crypto cases, whether sourced

REGENCY B

The Nation State Fraud Playbook

Nation state financial fraud is not a variant of traditional fraud. It is a different category of threat, built on different motivations, different resources, and a resilience that arrests and takedowns cannot touch, and state tax agencies sit squarely in its path. This talk examines four state actors, North Korea, Russia, China, and Iran, and the distinct playbooks each runs against financial and government systems: crypto heists and IT worker infiltration from the DPRK (including operatives who have applied for jobs, and in some cases government contracts, under false identities), a state-crime nexus that makes Russian organized crime functionally indistinguishable from Russian intelligence, financial espionage and insider recruitment from China, and four decades of sanctions evasion architecture from Iran. This talk lays out what state agencies need to know: where current verification and detection processes fall short, and what a more resilient posture looks like for tax administration in an era when sophisticated state actors target government systems as routinely as they target banks.

David Maimon

FOR REFERENCE ONLY
Agenda as of July 28, 2026

internally or through IRS leads
- How to subpoena crypto exchanges for additional attribution and transaction information in order to expand cases

Participants will engage with real-world scenarios throughout the session:

- Analyze crypto cases to uncover multiple income streams within a single taxpayer profile
- Evaluate unreported trading activity and estimate taxable gains
- Consider how income may be attributed and apportioned across states based on observed activity
- Work through how to build and support an audit-ready case
- Explore commonly used approaches and tools for organizing and interpreting complex transaction data

Whether your goal is to identify new cases or more effectively work those already identified, this workshop provides a practical framework to translate crypto activity into clear, defensible state tax enforcement

Andrey Shomer

1:30 PM – 2:30 PM · 60 min

1:30 PM – 2:30 PM · 60 min

FOR REFERENCE ONLY
Agenda as of Oct 14, 2026

2:30 PM – 2:45 PM

2:30 PM – 2:45 PM *Networking Break*

Network with your fellow attendees at our afternoon breaks.

Midway West · 15 min

2:45 PM – 3:45 PM

GRAND A

How to Make Every Employee Part of Your Data Strategy

Data strategy succeeds or fails based on whether frontline employees understand their role in collecting, maintaining, and using data — not just the analysts and IT staff. This session examines how tax agencies can embed data awareness into everyday workflows, job responsibilities, and organizational culture without requiring technical expertise from every employee.

Jason Woodcock will walk through practical approaches for communicating data standards, establishing clear ownership at the operational level, and building internal accountability structures that keep data quality consistent across departments. Attendees will leave with a framework for identifying where data responsibilities are unclear in their own agencies and how to close those gaps.

Jason Woodcock

2:45 PM – 3:45 PM · 60 min

GRAND B

How Coding Agents Can Give Your Developers Superpowers

AI

This session explores how AI-powered coding agents can accelerate software development within tax administration systems. Participants will examine real-world implementations of coding assistants that automate routine programming tasks, generate code snippets, and identify potential bugs before deployment.

Andrew Gieseke

2:45 PM – 3:45 PM · 60 min

GRAND C

Climbing the Mountain of Crypto Data: 1099-DA and beyond

Crypto

The new Form 1099-DA is here - and it's an avalanche of data that's different from other 1099 series forms. This session examines what that data looks like, how states can access it through existing information-sharing agreements, and what limitations exist in the current reporting framework.

Panelists will also address the broader data landscape beyond 1099-DA, including blockchain analytics tools, third-party data sources, and emerging compliance strategies states are using to identify unreported crypto income and close the tax gap.

Roger Brown

2:45 PM – 3:45 PM · 60 min

REGENCY B

Sponsor Series - FAST: The New Agency Playbook: Thriving Against the Odds

Agencies everywhere are feeling the squeeze. Staffing gaps, rising workloads, and tighter budgets are reshaping what “business as usual” looks like. But within these constraints lies a powerful opportunity: the chance to reimagine how work gets done.

Join us for a 50-minute session featuring real-world insights from revenue agencies across the country.

Hear how your peers are:

- Managing increased workloads with existing staff and systems
- Streamlining processes to improve efficiency and consistency
- Delivering better, more responsive customer experiences"

Matthew Kantor

2:45 PM – 3:45 PM · 60 min

3:45 PM – 4 PM

3:45 PM – 4 PM

Networking Break

Network with your fellow attendees at our afternoon breaks.

Midway West · 15 min

FOR REFERENCE ONLY
Agenda as of July 16, 2025

4 PM – 5 PM

GRAND A

State Portals - Modernization and Optimization are Two Different Words

CX

Data has always been the cornerstone of effective technology systems, and this is especially true for machine learning and AI. Because data serves as the "on-ramp to AI", its quality directly influences the accuracy and reliability of outcomes. In this presentation, we'll discuss lessons from the preparation of data for input into MathtechAI, an internally focused proof of concept designed to help agency stakeholders answer their questions about policy and procedure.

Frank Nestore

4 PM – 5 PM · 60 min

GRAND B

How Society is Using AI against Governments

As AI tools become freely available and infinitely scalable, individuals and businesses are increasingly using them to navigate complex tax codes, automate protest filings, and identify appeal opportunities at a volume that legacy agency systems were never designed to handle. This session examines how AI-driven filing and protest activity is outpacing the staffing and automated defenses that state and local tax agencies currently have in place.

Participants will explore specific tactics being used against tax agencies — from mass-generated appeals to AI-assisted exploitation of statutory ambiguities — and discuss what administrators can do to detect and respond to this growing challenge.

Josh Sandler

4 PM – 5 PM · 60 min

GRAND C

What if you had to build a Tax Agency from Scratch?

Bougainville, a newly autonomous region in the South Pacific, faces a rare and complex challenge: building a tax agency from the ground up, with no legacy systems, inherited processes, or technical debt to contend with. This session examines what that blank-slate opportunity actually looks like in practice — the decisions, constraints, and tradeoffs involved in designing a modern tax administration using current technology. The session will explore how foundational choices around systems architecture, compliance strategy, and organizational structure differ when there is no existing infrastructure to work around or accommodate. State and local tax administrators may find unexpected parallels to their own modernization efforts, particularly when evaluating what they would do differently if starting fresh.

Nathan Benson

4 PM – 5 PM · 60 min

REGENCY B

Now You See It, Now You Don't: Revealing the Taxpayers Behind Anonymous Transactions

Ownership is easy to record — the true owner, not always. Across jurisdictions, a surprising share of filings involve parties that can't be identified, leaving capital gains, income tax, and controlling interest obligations hidden in plain sight. Whether the asset is real property, a business interest, or a financial instrument, the playbook for obscuring ownership follows familiar patterns: layered entities, nominee holders, and jurisdictional gaps that exploit the seams between reporting regimes. In this session, IVIX follows the trail — unpacking how ownership gets obscured across asset classes and business structures, where enforcement breaks down, and how tax authorities can connect the dots. Through real-world examples, we show how to surface the true owners behind an entity or holding, link them to their obligations, and turn missing data into actionable cases.

Deborah Pianko

4 PM – 5 PM · 60 min

FOR REFERENCE ONLY
Agenda as of July 6, 2026

5 PM – 8 PM

5 PM – 8 PM

Networking Reception in the Exhibit Hall

Join us for the grand opening of the 2025 FTA Technology Conference Exhibit Hall! Refreshments and light bites are served, and you'll be able to see the latest in tax technology and services from our exhibitors.

Midway West · 180 min

TUESDAY, AUGUST 4, 2026

7:30 AM – 9 AM

MIDWAY WEST

Breakfast in the Exhibit Hall

Start your day off with a hot breakfast buffet in our exhbiit hall.

7:30 AM – 9 AM · 90 min

REGENCY A

Technology and Operations Leader Breakfast

This government-only breakfast is for Technology and Operations Leaders (title equivalents of Commissioner, COO, CIO, CISO, or platform/ITS director). If you are unsure if you should attend, email ryan.minnick@taxadmin.org

7:30 AM – 9 AM · 90 min

9 AM – 10 AM

9 AM – 10 AM

How Executives Are Learning to Lead with GenAI: The Four Stages of GenAI Maturity

Generative AI is moving quickly, but most organizations are still learning how to understand its practical value, manage its risks, and guide its use responsibly. This session will offer a practical maturity map for leaders, tracing how GenAI use can evolve from individual assistance, to task execution, to workflow support, to more advanced agentic systems. Along the way, we will explore what each stage means for leadership, training, governance, and organizational value. Attendees will leave with a clearer way to assess where their teams are today, where GenAI may create meaningful opportunities, and what questions leaders should be asking as the technology continues to develop.

Alex Denniston

Grand DEF · 60 min

10 AM – 10:30 AM

10 AM – 10:30 AM

Coffee Break

Network with your fellow attendees at our morning coffee break.

Midway West · 30 min

FOR REFERENCE ONLY
Agenda as of July 10, 2026

10:30 AM – 11:30 AM

GRAND A

Tax Breaks LIVE: You have the Data, what's the Question?

David Casey, Rodrigo Kreis De Paula, Rahul Sarathy

10:30 AM – 11:30 AM · 60 min

GRAND B

Let's speak plainly, 2.0 - Nevada's next-generation Plain Language Workflow

Nevada's Department of Taxation will walk through the evolution of its plain language initiative, detailing how the agency moved from ad hoc rewrites to a structured, repeatable workflow for transforming tax notices, forms, and guidance documents into clear, accessible communication. The session covers the tools, review processes, and internal governance structures that make the workflow scalable across document types and agency units.

Presenters will share specific before-and-after examples, discuss how readability metrics and taxpayer feedback are used to measure outcomes, and address the practical challenges of building staff buy-in across departments with different writing cultures. Participants will leave with a replicable framework they can adapt for their own agency's plain language efforts.

Scott Freidus, Patric Starr

10:30 AM – 11:30 AM · 60 min

GRAND C

Success from Day 0: How Procurement and Contracts Build The Foundation for Engagement

This session examines how tax agencies can use the procurement and contracting process as a strategic tool for vendor engagement, setting the stage for successful technology implementations before a project officially begins. Topics will cover how contract language, performance standards, and vendor accountability mechanisms established at the outset can prevent common implementation pitfalls.

Participants will explore practical approaches to structuring solicitations and contract terms that align vendor incentives with agency outcomes, including how to define deliverables, milestones, and remedies in ways that hold up throughout a project's lifecycle.

Brian Oliner

10:30 AM – 11:30 AM · 60 min

REGENCY B

Strategic AI for Tax Administration

It's Time to Streamline Your Agency

Tax agencies today are being asked to do more with less - chase down debtors, deal with an overwhelming volume of risk, and make difficult calls on how to close the tax gap. That's why RSI built PremierIQ, an AI platform designed specifically for tax agencies to increase efficiency, maximize revenue, and reduce costs.

Join us to see how PremierIQ moves agencies from reactive to proactive compliance as we walk through the platform's modular capabilities, share what's possible today, and discuss what it could mean for the future of your tax administration.

David Smith, Evan Wilson

10:30 AM – 11:30 AM · 60 min

11:30 AM – 12 PM

11:30 AM – 12 PM *Networking Break in the Exhibit Hall*

Network with your fellow attendees in our exhibit hall.

Midway West · 30 min

FOR REFERENCE ONLY
Agenda as of July 16, 2026

12 PM – 1:30 PM

12 PM – 1:30 PM

Lunch in the Exhibit Hall

Enjoy lunch in our exhibit hall with your fellow attendees and visit our exhibitors afterwards. This is your last chance to see the exhibits!

Midway West · 90 min

1:30 PM – 2:30 PM

GRAND A

Technology Leaders Panel: Charting the Future of Tax Administration

Join a panel of technology leaders from across state and local tax agencies as they share insights on navigating today's challenges and tomorrow's opportunities. From modernizing legacy systems to harnessing AI and data analytics, panelists will discuss the innovations driving change—and the leadership required to make it happen. Bring your questions and hear how these leaders are prioritizing investments, building resilient teams, and shaping the future of digital government.

Michael Foster, Beth Hertweck, Ananias Williams III

1:30 PM – 2:30 PM · 60 min

GRAND B

Strategy works best when everyone is part of the discussion

Two former state tax agency leaders draw on their experience managing large-scale projects to examine why strategy fails when key stakeholders are left out of the conversation. As agencies accelerate technology adoption, projects frequently shift in size and scope — making inclusive planning and clear direction more critical than ever.

This session presents a practical methodology for building team alignment from the start, along with best practices for keeping strategy on track as project conditions evolve.

Peter Barca, Mark Godfrey

1:30 PM – 2:30 PM · 60 min

GRAND C

Streamlining Filing with Pennsylvania's Fast File Program

Efiling

Meggan Swisher

1:30 PM – 2:30 PM · 60 min

REGENCY B

Sponsor Series Session 5

1:30 PM – 2:30 PM · 60 min

2:30 PM – 2:45 PM

2:30 PM – 2:45 PM

Networking Break

Network with your fellow attendees.

Midway West · 15 min

FOR REFERENCE ONLY
As of July 16, 2026

2:45 PM – 3:45 PM

GRAND A

Perspectives from the State CIO's View: NASCIO

Partner Association

Doug Robinson

2:45 PM – 3:45 PM · 60 min

GRAND B

2026 FTA Award Winner: Wisconsin's Advanced Dashboards and Data Analysis

2:45 PM – 3:45 PM · 60 min

GRAND C

Evolution of a Support Model for an Integrated System

Technology continues to evolve in workstreams of our workforce. The pace of change and business needs require innovation and transformation of employee support models to be able to effectively respond, implement, and maintain our systems and knowledge. The WA State Department of Revenue was revolutionary with a support model strategy during a huge modernization of our tax and licensing technology system project. The project has ended, we are in maintenance and operations mode, it was unclear if our new staffing model was effective and efficient for an accountable government. We took the time to inspect our support model to answer the questions. We are here to share our journey and what we learned.

2:45 PM – 3:45 PM · 60 min

REGENCY B

Putting AI to Work in Tax Administration

AI is everywhere in the tax-technology conversation, this session shows what it actually looks like in practice. We will show how to catch a anomalous and fraudulent returns with machine-learning and AI that explains *why* it flagged it, then use Amazon Quick to analyze tax data through plain natural-language questions. We will also cover how AI is simplifying the infrastructure management for tax systems. Throughout, we'll tackle the question every tax technologist is asking: how to do this safely with Tax payer data and where AI should and shouldn't touch sensitive data, and why a human stays in the loop.

Sohaib Tahir

2:45 PM – 3:45 PM · 60 min

3:45 PM – 4 PM

3:45 PM – 4 PM

Networking Break

Network with your fellow attendees and grab a snack.

Midway West · 15 min

FOR REFERENCE ONLY
Agenda as of July 16, 2026

4 PM – 5 PM

GRAND A

What makes an ITS Award-Winning? (It's more than software)

Kentucky's Department of Revenue recently launched DORIS, a new integrated tax system that has earned multiple awards for its taxpayer-friendly interface and expanded self-service options. The secret to its success goes beyond the software — it required sustained agency-wide buy-in, deliberate change management, and coordination across departments.

This session offers a behind-the-scenes look at how the Kentucky team built momentum, overcame internal resistance, and delivered a system that works for both staff and taxpayers. Attendees will hear directly about the decisions, trade-offs, and organizational strategies that turned a major technology overhaul into an award-winning implementation.

Beth Hertweck

4 PM – 5 PM · 60 min

GRAND B

Improving Agency Notice Resolution – An Initiative Involving The Wisconsin and Illinois Departments of Revenue and Payroll Providers, ADP and Gusto.

In 2023 providers and the Wisconsin Department of Revenue started a project to improve the compliance and resolution of agency notices. Agencies issue notices for multiple reasons including failure to file a return, additional tax due, question about a filing, question about a payment and change in filing frequency. Taxpayers using a provider send notices received from agencies to their provider for resolution. This session will show how a process was developed and implemented in the Wisconsin Department of Revenue and the Illinois Department of Revenue. The session will also provide data on the improvement in notice resolution, reduction in second notices and improvement in taxpayer service level from providers and agencies that has been achieved to date. The session will show the progress made on the effort from the introduction of this topic at FTA Tech in Milwaukee.

The presenters will be representatives from the Wisconsin Department of

GRAND C

IRS Safeguards: Partnership beyond reviews help keep taxpayer data secure

This session examines the pending update to IRS Publication 1075, highlighting key changes that state and local tax agencies should prepare for. Beyond the formal review process, the IRS Safeguards team maintains ongoing collaboration with agencies that is equally critical to protecting taxpayer data — particularly as technology and cybersecurity threats continue to evolve.

The session emphasizes that the partnership itself comes first: proactive, continuous engagement with the Safeguards team strengthens data security in ways that periodic reviews alone cannot achieve.

John Sims

4 PM – 5 PM · 60 min

REGENCY B

Sponsor Series Session 7

4 PM – 5 PM · 60 min

FOR REFERENCE ONLY
Agenda as of 3/16/2026

Revenue, Susan Dukes, and representatives from providers including ADP, Charles Collins and Gusto, Shelly Abril.
Charles Collins, Susan Dukes, Lauren Escalante
4 PM – 5 PM · 60 min

5 PM – 6 PM

5 PM – 6 PM

Networking Reception in the Exhibit Hall (New For 2026!)
Following the second full day of sessions, attendees are invited to unwind and connect with fellow tax administrators over drinks in the Exhibit Hall. This is the final opportunity to visit exhibitor booths and speak directly with vendors about their products and services before the hall closes for the conference.
Midway West · 60 min

WEDNESDAY, AUGUST 5, 2026

7:30 AM – 9 AM

7:30 AM – 9 AM

Breakfast
Start your day off with a hot breakfast buffet
Midway West · 90 min

FOR REFERENCE ONLY
Agenda as of July 16, 2026

9 AM – 11 AM

GRAND A

MEF Vendor Support Enhancement

Efiling

This session examines how the Georgia Department of Revenue identified critical gaps in its Modernized e-File (MEF) vendor support model and developed targeted solutions to address them. Presenters will walk through the specific challenges uncovered, the process used to redesign support workflows, and the measurable outcomes achieved so far.

A central element of this initiative is the use of **Generative AI** to accelerate problem resolution, improve the quality of vendor interactions, and reduce response times across the support lifecycle. Attendees will come away with a concrete understanding of how AI tooling was applied in a real-world tax administration context and what results it produced.

Jon'Qua Bazemore, Dewayne Davis, Jamarr Glover

9 AM – 10 AM · 60 min

Platform & ITS Director Panel: Building on Your ITS Foundation

An integrated tax system is the foundation of an agency's operations, but what agencies build on top of that foundation determines the quality of both staff outcomes and the taxpayer experience. Two technology leaders share how their agencies have leveraged their ITS platforms to drive improvements beyond core tax administration functions.

Greer Allison, Beth Hertweck

10 AM – 11 AM · 60 min

GRAND B

Workshop: How GenAI can help speed up claims judgement

The OPTIMUS platform was built in-house by the City of São Paulo to help adjudicators manage the large volume of tax appeals and claims filed each year. The system uses generative AI to support two core functions: classifying incoming claims and surfacing relevant information to assist judges in reaching decisions — significantly accelerating the adjudication process.

This session walks through how OPTIMUS was designed and implemented, then shifts to a practical discussion of what it would take to build a similar capability within a U.S. state or local tax agency, including the technical, legal, and operational considerations involved.

Rodrigo Kreis De Paula

9 AM – 10 AM · 60 min

How data analysts solve Big Data questions in Taxation - Part 2: Integrating analytics with business processes

Data

Building upon the technical application of analytical concepts, this session will examine three use cases of applying analytics into existing business processes, with a focus on planning, stakeholder management, communication, education, and governance. Our use cases will cover implementing the first-of-its-kind Non-Owner Occupied Property tax in RI using private and public data, creating near-real time feedback loops for analysis and handling of retroactive tax changes as a result of H.R.1 for tax years 2022-2024, and the implementation of an automated process for receiving, analyzing and reporting on Taxpayer First Act (and other FTI) data files.

GRAND C

Technology Trends Shaping the Future: Insights from the Latest ETAAC Report

What technologies are reshaping the tax landscape—and how should agencies prepare? This session highlights key findings from the latest Electronic Tax Administration Advisory Committee (ETAAC) report, focusing on emerging trends, challenges, and opportunities in tax technology. Explore recommendations on cybersecurity, digital identity, data sharing, and innovation, and hear how these insights can inform your agency's strategic planning and modernization efforts.

David Casey, Doug Harding

9 AM – 10 AM · 60 min

IRS Safeguards

Understanding the taxpayer experience is key to delivering better service—and smarter channel strategies. In this session, Colorado's Department of Revenue shares how journey mapping helped them uncover pain points, streamline communications, and optimize service delivery across channels. Learn how this human-centered approach led to actionable insights, improved digital engagement, and a more effective use of staff resources. You'll leave with practical tips for mapping your own customer journeys and transforming how your agency connects.

10 AM – 11 AM · 60 min

FOR REFERENCE ONLY

WEDNESDAY, AUGUST 5

10:00 AM - 4:00 PM	Registration & Information Desk	Grand Ballroom Foyer
12:00 PM - 1:00 PM	Lunch	Grand Ballroom ABC
1:00 PM - 1:15 PM	RACC Welcome & Opening Session	Grand Ballroom DEF
1:15 PM - 2:45 PM	Keynote Presentation: FAST Company & Product Update	Grand Ballroom DEF
2:45 PM - 3:00 PM	Afternoon Break	Grand Ballroom Foyer
3:00 PM - 4:00 PM	General Session - You Have a Dream! I Have an Action! Leading an IT Project When Others Don't Believe	Grand Ballroom DEF
4:00 PM - 5:30 PM	Demo Hall	Grand Ballroom Foyer
4:00 PM - 7:00 PM	Reception	Grand Ballroom ABC

THURSDAY, AUGUST 6

8:00 AM - 5:00 PM	Registration & Information Desk	Grand Ballroom Foyer
8:00 AM - 9:00 AM	Breakfast	Grand Ballroom ABC
9:00 AM - 12:00 PM	**Business Breakouts:** - By the Data, for the People: Enhancing Taxpayer Lives through Interdisciplinary Tech Collaboration - Is Testing Testing Your Resources? - FTI Data: Leveraging GenTax to Improve Customer Experience While Maintaining a Secure Environment	Grand Ballroom DEF
9:00 AM - 12:00 PM	**Tech Breakouts:** - Security Team Updates - FAST Technical Team Updates - FAST Hosting Services	Regency Ballroom C
12:00 PM - 1:00 PM	Lunch	Grand Ballroom ABC
1:00 PM - 2:00 PM	**General Session –** Pennsylvania Department of Revenue Pre-filled Return Pilot Program	Grand Ballroom DEF
2:00 PM - 3:00 PM	**General Session –** One Customer, Many Channels: Ohio's Contact Center Implementation	Grand Ballroom DEF
3:00 PM - 3:15 PM	Afternoon Break	Grand Ballroom Foyer
3:15 PM - 4:30 PM	**General Session –** Unlocking Capabilities You Already Own	Grand Ballroom DEF
4:30 PM - 5:00 PM	**General Session –** Conference Wrap-Up	Grand Ballroom DEF
6:00 PM - 10:00 PM	RACC Evening Event	Missouri Botanical Gardens

General Session Descriptions

General Session – RACC Welcome & Opening Session

Description: Join your 2026 RACC Chairperson, Patric Star, as he uses his own unique style to kick off the event! This session will set the stage for the Keynote Presentation by Martin Rankin.

General Session – Keynote Presentation: FAST Company & Product Update

Description: FAST has been working hard to bring you new features and developments. FAST Managing Partner Martin Rankin will share an exclusive overview of recent FastCore updates-and what's visible on the horizon.

General Session – You Have a Dream! I Have an Action! Leading an IT Project When Others Don't Believe

Description: This session tells the story of the Nevada project that many believed couldn't be done—until it was. Through confidence in the FAST solution, strong partnerships, and disciplined execution, skepticism turned into success. Hear how you can challenge assumptions, manage doubt, and shift mindsets. It is about the realization of dreams, setting and obtaining goals, and what is most important when leading a team to success.

General Session – Pennsylvania Department of Revenue Pre-filled Return Pilot Program

Description: As part of the Pennsylvania Department of Revenue's continued commitment to improving customer service, the department launched a new Fast File initiative during the recent personal income tax season. The pilot program offered eligible Pennsylvanians a free and simplified way to file their Pennsylvania Personal Income Tax Returns (PA-40s). The presentation will cover Pennsylvania's approach to implementing the program, the results of the pilot, and plans for expansion.

General Session – One Customer, Many Channels: Ohio's Contact Center Implementation

Description: This session provides an inside look at Ohio's implementation of a multi-channel contact center designed to support and track customer interactions at scale. Learn how the state integrates in-person service, phone support, web inquiries, and live chat into a unified contact center experience. Attendees will gain insight into how this approach enhances visibility into cross-channel contact history and simplifies the disclosure process to support efficient, consistent taxpayer service.

General Session – Unlocking Capabilities You Already Own

Description: We regularly see interesting ideas and challenges emerge from across our client base. While Tax has been the foundation, many of the capabilities in GenTax originated in other business lines and are now being applied in new ways. This panel will focus on how Tax agencies are implementing features that originated elsewhere to solve real operational problems.

Business Breakout Descriptions

By the Data, for the People: Enhancing Taxpayer Lives through Interdisciplinary Tech Collaboration

Description: Learn how Colorado leveraged existing software and data, focusing on human-centered design, to return millions to its residents by using the power of the Discovery manager and Taxpayer Access Portal for more than just billing. Get high-level explanations of how we put the project together, how we overcame different data and mindset challenges, and tips and tricks to remember when you pursue the same kind of work.

Is Testing Testing Your Resources?

Description: Testing is a critical function in your agency, and it can start to feel like a full-time effort with constant upgrades, service packs, and SQRs. Are you using more and more resources to keep up? Hear how other agencies have addressed this challenge and made dramatic improvements.

FTI Data: Leveraging GenTax to Improve Customer Experience While Maintaining a Secure Environment

Description: In this panel session, we will discuss how two agencies used GenTax to optimize the use of Federal Tax Information (FTI) while maintaining the IRS's strict security requirements.

RACC Evening Event Details

Missouri Botanical Gardens
Thursday, August 6, 2026
6:00 PM – 10:00 PM

You're warmly invited to the Missouri Botanical Gardens for an enchanted event under the stars. Discover whimsical blooms, unforgettable art, and delicious bites as you soak in the magic with fantastic company.