



TECHNOLOGY CONFERENCE

FEDERATION OF TAX ADMINISTRATORS

2019 FTA Technology
Conference and Exhibition

Conference Guide

August 11-14, 2019
Marriott at the Renaissance Center
Detroit, Michigan

Welcome to the 34th Annual FTA Technology Conference and Exhibition. We again gather, this time in Detroit, to learn about new initiatives, discuss issues of interest and get information on new products and services in the tax and revenue marketplace.

This year's conference features a full agenda of sessions on new initiatives by government tax authorities, descriptions of technology applications and standards, and remarks by industry providers on a variety of topics important to the tax administration community.

Thanks to your willingness to share your knowledge, we are offering significant sessions on useful developments on the use of technology in taxation, as well as a special vendor Solutions Series breakout.

Some of you will be attending our E-Standards working group meeting after the close of the conference, to further develop state and federal electronic commerce standards.

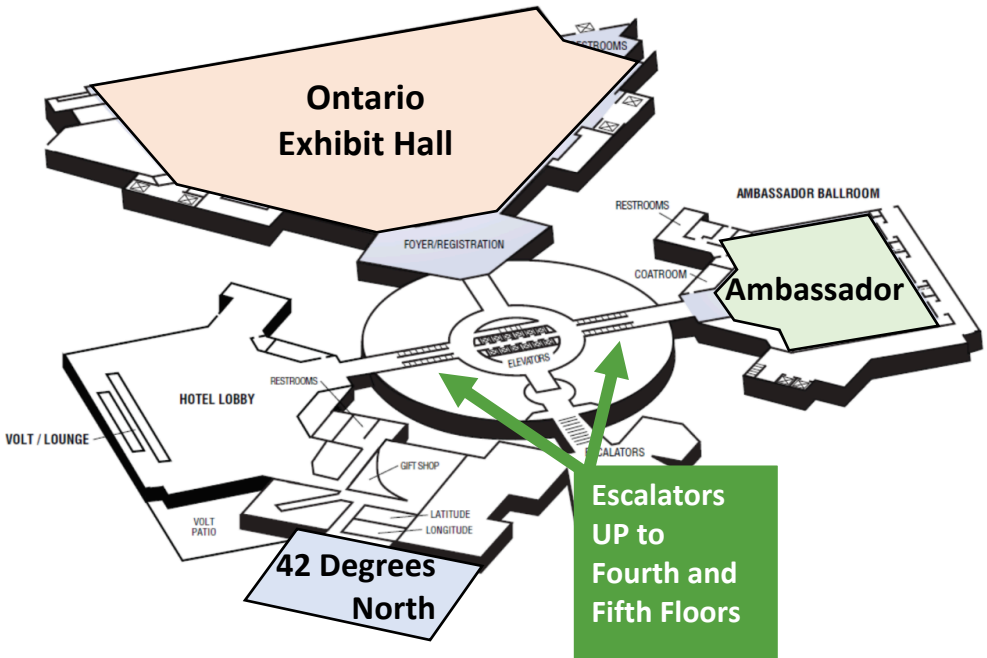
As always, we hope this year's FTA Annual Technology Conference and Exhibition assists you in your new technology efforts and that you find the time to enjoy the unique attractions of Detroit.

Gale Garriott
Executive Director
Federation of Tax Administrators

Table of Contents

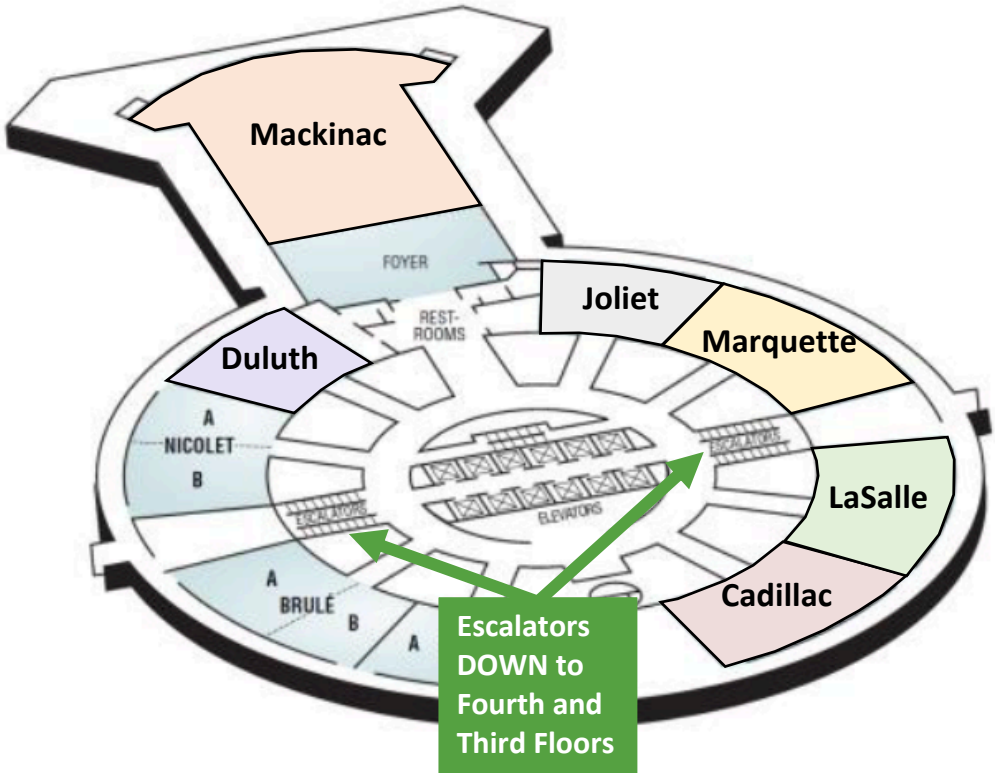
Map of the Hotel – Third Floor	4
Map of the Hotel – Fifth Floor	5
Map of the Exhibit Hall	6
Exhibitor Listing by Booth	7
Agenda at a Glance.....	8
Conference Agenda	10
Sunday, August 11	10
Monday, August 12	10
Tuesday, August 13	17
Wednesday, August 14.....	26
E-Standards Meeting at a Glance.....	28
E-Standards Meeting Agenda	29
Exhibitor & Marketing Partner Directory	31

Map of the Hotel – Third Floor



42 Degrees North	<ul style="list-style-type: none"> • Sunday Welcome Reception
Ontario Exhibit Hall	<ul style="list-style-type: none"> • Monday Networking Reception • Exhibit Hall • Breakfast (<i>Tuesday</i>) • Lunch (<i>Tuesday</i>)
Ambassador	<ul style="list-style-type: none"> • Registration • Breakfast (<i>Monday</i>) • General Session

Map of the Hotel – Fifth Floor



Mackinac	<ul style="list-style-type: none"> • Breakfast (<i>Wednesday</i>)
Duluth	<ul style="list-style-type: none"> • IT Leaders Breakfast (<i>Government Only, By Invitation Only</i>) • E-Standards Breakfast (<i>Thursday</i>)
Joliet	<ul style="list-style-type: none"> • Breakout Sessions (<i>Monday, Tuesday, Wednesday</i>) • E-Standards Meeting (<i>Wednesday, Thursday</i>)
Marquette	<ul style="list-style-type: none"> • Breakout Sessions (<i>Monday, Tuesday, Wednesday</i>)
LaSalle	<ul style="list-style-type: none"> • Breakout Sessions (<i>Monday and Tuesday</i>)
Cadillac	<ul style="list-style-type: none"> • Breakout Sessions (<i>Monday and Tuesday</i>)

Map of the Exhibit Hall

Ontario Exhibit Hall

Open Monday 5 pm to 8 pm and Tuesday 7:30 am to 1:30 pm



Exhibitor Listing by Booth

Full Exhibitor & Marketing Partner Directory starts on Page 31

Booth	Company
201 and 301	FAST Enterprises
207	ASR Analytics
208	SAS Institute Inc.
210	Microsoft
213	Axiomatic
214 and 215	RSI
220	Adelman Consulting
307	Mathtech, Inc.
308	First Data Government Solutions
309	Experian
310	TDEC
312	ibml
313	Fairfax Software
315	Agissar

Agenda at a Glance

Sunday, August 11

Time	Location	Event
3 pm - 7:30 pm	Ambassador Foyer	Registration
6 pm - 8 pm	42 Degrees North	Welcome Networking Reception

Monday, August 12

Time	Location	Event
7:30 am - 5 pm	Ambassador Foyer	Registration
7:30 am - 9 am	Ambassador Foyer	Breakfast Buffet
7:30 am - 9 am	Duluth B	IT Leadership Breakfast <i>(invitation only, government only)</i>
9 am - 11:30 am	Ambassador Ballroom	General Session
11:30 am - 1:30 pm		Lunch On Your Own
1:30 pm - 5 pm	Marquette LaSalle Cadillac Joliet	Breakout Sessions
5 pm - 8 pm	Ontario Exhibit Hall	Networking Reception in the Exhibit Hall

Agenda at a Glance

Tuesday, August 13

Time	Location	Event
7:30 am - 5 pm	Ambassador Foyer	Registration
7:30 am - 9 am	Ontario Exhibit Hall	Breakfast Buffet
7:30 am - 9 am	Duluth B	IT Leadership Breakfast <i>(invitation only, government only)</i>
9 am - 10 am	Ambassador Ballroom	General Session
10:30 am - 11:30 am	Marquette LaSalle Cadillac Joliet	Breakout Sessions
11:30 am - 1:30 pm	Ontario Exhibit Hall	Lunch Buffet
1:30 pm - 5 pm	Marquette LaSalle Cadillac Joliet	Breakout Sessions

Wednesday, August 14

Time	Location	Event
7:30 am - Noon	Ambassador Foyer	Registration
7:30 am - 9 am	Mackinac Ballroom	Breakfast Buffet
9 am - 11 am	Marquette Joliet	Breakout Sessions
11 am - Noon	Mackinac Bridge	Networking Break

Conference Agenda

Sunday, August 11

3 pm - 7:30 pm **Registration**
Ambassador Foyer

6 pm - 8 pm **Welcome networking reception**
42 Degrees North

Monday, August 12

7:30 am – 5 pm **Registration**
Ambassador Foyer

7:30 am - 9 am **Breakfast Buffet**
Ambassador Foyer

7:30 am - 9 am **IT Leadership Breakfast**
(invitation only, government only)
Duluth B

9 am - 11:30 am **General Session**
Ambassador Ballroom

Welcome

Gale Garriott, Executive Director, Federation of Tax Administrators

Where Does Software Come From?

Eric Johnson, GitHub

Lessons Learned from Michigan's Data Analytics and Governance Team: Building Successful Communication Lines Between Technical and Business Stakeholders

Gideon Lowe, Michigan Department of Treasury

Conference Agenda

Monday, August 12

11:30 am - 1:30 pm **Lunch On Your Own**

1:30 pm - 2:30 pm **Concurrent Sessions**

SESSION 1 – MARQUETTE

IRS Safeguards: Get a First Look at Upcoming Changes

Steve Matteson, IRS Safeguards

Megan Ripley, IRS Safeguards

The Office of Safeguards will be coming out with an updated and reformatted Publication 1075 later this year. Get the first look at some of the major changes, including aligning with the new NIST 800-53 Rev 5, NIST 800-63 Digital Identity Guidelines and the addition of several Privacy controls. We will also look at updates to Multifactor Authentication, Cloud and Background Investigation requirements.

SESSION 2 – LASALLE

Taking Security Awareness Training to the Next Level

Bethany Rawls, South Carolina Department of Revenue

Do you want to promote a culture of cybersecurity in your agency? Do you want your agency to be hyper-vigilant in keeping taxpayer and agency data safe and secure? The South Carolina Department of revenue recently undertook a new, three-pronged approach to Security Awareness Training and created entertaining and informative opportunities to reinforce learning about this essential topic. This session will include takeaways to help you bring these ideas to your agency.

Conference Agenda

Monday, August 12

1:30 pm - 2:30 pm Concurrent Sessions (Continued)

SESSION 3 – CADILLAC

Small State, Big Ideas: Innovations in Organizational Change from IT Transformation

Neena Savage, Rhode Island Division of Taxation

How do we change our organizational structure, culture, and business processes to maximize the full potential of our new integrated tax computer software system? The following factors also help to further contextualize the problem: high turnover, new technology, existing issues, shifting impacts, morale, agile workforce, and union.

1:30 pm - 2:30 pm Solution Series – Fast Enterprises, LLC
Joliet

Tax Administration Around the World

Joe Milack, Fast Enterprises, LLC

This presentation will discuss trends in tax administration around the world with emphasis on the ways in which tax agencies are adapting to new technologies and business models that are challenging traditional approaches of tax administration. It will include unique examples and insights from tax agencies throughout the world.

2:30 pm - 2:45 pm Break
Mackinac Bridge

Conference Agenda

Monday, August 12

2:45 pm - 3:45 pm **Concurrent Sessions**

SESSION 1 – MARQUETTE

IRS eFile Update

Syed Abbas, IRS

Juanita Wueller, IRS

The IRS will provide an update of the 2019 filing season that includes both federal and state year-to-date volumes. A review of upcoming activities will include the ATS start-up and end-of-year cutover for IMF and BMF. State-specific reports will include a report card of each state's activity and year-to-date volume. The IRS also has best practice ideas for MeF and timely issue resolution.

SESSION 2 – LASALLE

Positive Incentives for Phishing Identification and Avoidance

Brain Ventura, City of Portland

Phishing is a major issue today. Workforce members interacting with their email could cause hundreds of thousands of dollars worth of damages with the click of a mouse. With ransomware and exposed data threats, how do we protect the organization? Do we fire the worker? Do we buy fancy tools? Can we stop doing email? What can we do? In this discussion we will consider the options for both positive and negative feedback, tools and phishing testing.

Conference Agenda

Monday, August 12

2:45 pm - 3:45 pm Concurrent Sessions (Continued)

SESSION 3 – CADILLAC

Maryland's Playbook of Change – Launch a Change Ambassador Program

Robin Aro, Comptroller of Maryland

Maryland's program to address the human side of tech modernization is an FTA Award Winner. The Cultural Change Management program was created to accompany an integrated tax modernization program. These vast and complex integration projects stretch over years and involve multiple vendors and touch nearly all areas of an agency. Maryland created a network of program champions who maintain two-way communications and identify potential risk areas from an employee adoption standpoint

2:45 pm - 3:45 pm Solution Series – Microsoft

Joliet

Microsoft Azure Certifications and Compliance Framework with Blueprints and Policy

Meladie Espiritu, Azure Senior Program Manager, Microsoft

Abhijeet Jhala, Cloud & Data Architect, Microsoft

Angel Perez, Azure Policy Program Manager, Microsoft

Learn how to use Azure Policy and Azure Blueprints to set up an environment and get a jump start in meeting your compliance needs – including IRS Pub. 1075.

3:45 pm - 4 pm

Break

Ballroom Foyer

Conference Agenda

Monday, August 12

4 pm - 5 pm

Concurrent Sessions

SESSION 1 – MARQUETTE

Meeting IRS Safeguards

Becca Estes, Alabama Department of Revenue

Brenda Lindsay, Michigan Department of Treasury

Moderator: Verenda Smith, FTA

This panel will discuss successes, challenges, and other best practices for meeting IRS Safeguards. Bring your questions and experiences – audience participation at this session is encouraged.

SESSION 2 – LASALLE

Tax Fraud & Account Takeover

Dan Petty, Credit Karma Tax

This session will focus on three things:

- 1) Building an understanding of the fraud life cycle and the underground economy around tax fraud and account takeover;
- 2) ideas to protect against fraudulent user creation;
- 3) ideas to protect against credential stuffing attacks and improve authentication

Conference Agenda

Monday, August 12

4 pm - 5 pm

Concurrent Sessions (Continued)

SESSION 3 – CADILLAC

Electronic Sales and Use Tax Exemption Certificate

Andrea Northwood, Wisconsin Department of Revenue

Many years ago, DOR consolidated more than 10 exemption certificates into one that could be used by any purchaser. The number of exemptions has increased and now exceeds a two-sided piece of paper. Join Wisconsin's project leaders to learn how they solved this problem by implementing a comprehensive electronic sales and use tax certificate – and how you can too.

4 pm - 5 pm

Solution Series – SAS

Joliet

The Infinite Canvas: Analyzing Social Networks in Virtual Reality

Michael Thomas, SAS

Virtual Reality (VR) has improved in quality and decreased in price in recent years. Enterprises are increasingly finding usages of this immersive (and fun!) technology. This presentation explores the use of Virtual Reality for fraud investigations and data exploration backed by the SAS® Viya® analytics engine. With VR, networks of transactions can be explored in immersive 3D. Advanced analytics and machine learning combine with VR to create an intuitive, interactive, and productive analyst experience. Come see it in action to learn about the technology that makes VR work, and visit the SAS booth to try it out for yourself!

5 pm - 8 pm

Networking Reception in the Exhibit Hall

Ontario Exhibit Hall

Conference Agenda

Tuesday, August 13

- 7:30 am - 5 pm** **Registration**
Ambassador Foyer
- 7:30 am - 9 am** **Breakfast Buffet in the Exhibit Hall**
Ontario Exhibit Hall
- 7:30 am - 9 am** **IT Leadership Breakfast**
(invitation only, government only)
Duluth B
- 9 am – 10:15 am** **General Session**
Ambassador Ballroom

Lessons Learned from Modernization: Experiences from Three States to Benefit You at Any Stage of Your Modernization Cycle

Robin Aro and Penny Wires, Comptroller of Maryland

Heidi Geathers, Washington State Department of Revenue

Rahul Sarathy, Rhode Island Department of Revenue

This can't-miss session features three stories that highlight a unique challenge or lesson learned from the modernization process. We'll hear about tax type selection for a new modernization project, training and testing in a modernized environment, and follow-on business process changes and considerations that a fully modern platform can bring to your agency. Following these three stories, we'll include questions from the audience in a brief panel discussion.

Special Presentation

Jonathan Lyon and Terry Garber, FTA

10:15 am - 10:30 am Break

Conference Agenda

Tuesday, August 13

10:30 am - 11:30 am Concurrent Sessions

SESSION 1 – MARQUETTE

The Current State of Cybersecurity

Brent Rambo, Intuit

Joe Lillie, Intuit

This session will take a look at the current cybersecurity threat landscape and will provide insights into trends for the coming year.

SESSION 2 – LASALLE

FTA Award Winner - Electronic Voluntary Disclosure Agreement (VDA) Process

Timothy Sanders, Alabama Department of Revenue

Previously, manual applications were filed and emails were used as a mode to keep all team members who work within the VDA process notified when additional information was requested or an agreement was approved. With the online portal, any team member with access can view the status of an application and any information that has been requested.

Conference Agenda

Tuesday, August 13

10:30 am - 11:30 am Concurrent Sessions (Continued)

SESSION 3 – CADILLAC

Decoding the Customer Experience – “Knowing Your Customer” Isn’t Just for Banks and Retailers Anymore

Lisa Loftis, SAS

Customer intelligence is the process of collecting and interpreting data from consumers to find the best ways to serve them. In a recent Harvard study, 79% of respondents indicated that the ability to deliver positive, real-time customer interactions will be extremely important in the next few years. Yet only 16% rate themselves as *very efficient* in this area. Why does this matter to a government tax agency? The quality of an taxpayer’s Customer Experience (“CX”) impacts their view of your organization and ultimately their behavior. In this session we will decode CX, explain what it is, illuminate the role of data in shaping citizen journeys, and highlight how successful organizations are implementing CX technology. Come learn about best practices used by household names such as the LA Kings, Orlando Magic, NY Mets, Chico’s, and 1-800-Flowers to keep their customers (and fans) engaged, satisfied, and coming back for more.

11:30 pm - 1:30 pm Lunch Buffet in the Exhibit Hall

Ontario Exhibit Hall

Conference Agenda

Tuesday, August 13

1:30 pm - 2:30 pm **Concurrent Sessions**

SESSION 1 – MARQUETTE

Using NIST Guidelines to Establish Requirements for the Security of the Tax Ecosystem

Robert Cox, IRS

Raja Sambandam, New Mexico Taxation and Revenue Department

Sidney Gibson, MITRE

Members of the Security Summit STAR (Strategic Threat Assessment and Response) working group will offer insights and background on the current recommendations of the group and the importance of them. This discussion will offer an understanding into how NIST guidelines can be used to establish and improve the security posture of the entire tax ecosystem.

SESSION 2 – LASALLE

The Current State of Processing

Chris Barry, Idaho State Tax Commission

Paul Leiter, Indiana Department of Revenue

Vince Panepinto, Louisiana Department of Revenue

Join our state panelists in taking a look at the current state of revenue processing. This discussion will cover challenges that remain, different approaches to processing, and other items that exist in this special realm where paper, digital returns, and modern IT systems converge.

Conference Agenda

Tuesday, August 13

1:30 pm - 2:30 pm Concurrent Sessions (Continued)

SESSION 3 – CADILLAC

Life after a Tax Systems Modernization

Dan Clemence, Rhode Island Department of Revenue

Mike Early, RSI

Congratulations! You're within weeks of converting your last major taxes to the new system and it operates as planned. With the implementation project winding down, it is time to focus on system operations. Please join us as we discuss tax system operations' roles, transition of responsibilities from vendors, and system adoption from an operations perspective.

1:30 pm – 2:30 pm Solution Series – ASR Analytics

Joliet

An Analytic Approach to Insider Threats

Dr. Peter Arena, ASR Analytics

Breaches do not always come from bad actors outside of your Agency. An insider threat is a security incident that originates within the organization. In this solution series, you will learn how to better use data analytics to recognize and understand the digital and behavioral aspects of insider threats.

2:30 pm- 2:45 pm Break

Mackinac Bridge

Conference Agenda

Tuesday, August 13

2:45 pm - 3:45 pm **Concurrent Sessions**

SESSION 1 – MARQUETTE

Your Legacy Collections System in the Modern World

Robin Aro, Comptroller of Maryland

Jeremy Howard, ASR Analytics

Marty Bidwell, ASR Analytics

Assessment amounts are a popular measure of the effectiveness of compliance programs, but do they tell the whole story? In this presentation, you will learn how your Department can use modern technology to efficiently and cost-effectively enhance your legacy systems to gain deeper insight into non-compliance and collectability.

SESSION 2 – LASALLE

Insourcing vs. Outsourcing – When, How, and Why?

Ron Johnson, Georgia Department of Revenue

Darcy Pyle, Georgia Department of Revenue

Michael Smith, Iron Mountain

Many state agencies use vendors as part of their processing flow. This panel will look at different processing scenarios and what to consider when considering insourcing or outsourcing. Volume, in-house capabilities, capacities, and regulatory requirements will all make an appearance in this exciting discussion.

Conference Agenda

Tuesday, August 13

2:45 pm - 3:45 pm Concurrent Sessions (Continued)

SESSION 3 – CADILLAC

Citizen Journey Mapping and the Road to Strategic Planning and Business Process Improvement

Frank Nestore, Mathtech, Inc.

Jason Woodcock, Mathtech, Inc.

This presentation will include an introduction to Journey Mapping and include public and private sector examples. Journey Mapping is a useful tool in strategic planning and business process improvement and can be used to highlight the perspective, challenges, and needs of citizens and other agency partners. The presentation also discusses how Journey Mapping concepts can be directly included in strategic planning exercises.

2:45 pm - 3:45 pm Solution Series – RSI

Joliet

Government Digital Transformation and the Cloud

John Walker, Senior Principle Technical Architect, RSI

As technological and regulatory issues of government computing drive decisions toward the cloud, citizens expect greater digital experiences, cybersecurity diligence and rapid technological advancement. Creating meaningful transitions to cloud implementation has never been more critical. Join us as we discuss cloud adoption in taxation and the architectural design choices behind them.

3:45 pm - 4 pm

Break

Mackinac Bridge

Conference Agenda

Tuesday, August 13

4 pm - 5 pm

Concurrent Sessions

SESSION 1 – MARQUETTE

Using Intelligent Mail Barcodes – Smart Postal Mail

Shane Lenker, Pennsylvania Department of Revenue

The PA Dept. of Revenue has recently implemented the Intelligent Mail Barcode on most outbound correspondence. This barcode is used in a variety of ways by DOR and the post office to get mail where it needs to go to quicker and more efficiently. DOR also now has a way to update address information automatically from the post office without having users review and update accounts manually. The project has not only lessened the need for manual work but has also seen direct ROI with mail making to the taxpayers quicker and thus, taxpayers sending in payments sooner.

SESSION 2 – LASALLE

The Future of Processing

Steve Chahal, Fairfax Software

Denis Lyatkin, TDEC

Michael Smith, Iron Mountain

Moderator: Jonathan Lyon, FTA

With the changing landscape of technology, labor, and regulation, processing in five or ten years will certainly not look like it does today. Join this panel for a discussion on what the future of processing might look like. This session will offer you a glance into the crystal ball of industry processing experts on what they see as the key trends to watch and where they think future-proofing efforts are best spent.

Conference Agenda

Tuesday, August 13

4 pm - 5 pm

Concurrent Sessions (Continued)

SESSION 3 – CADILLAC

Artificial Intelligence and Machine Learning

Rich Brunner, RSI

As artificial intelligence (AI) and machine learning (ML) take center stage, many organizations are realizing the benefits of more accurate information, reduced human costs, and quicker turnaround for citizens to get needed information. Join us for a discussion on how AI and ML can enable your agency to deliver more value for your constituents, reduce costs, and engage your taxpayers in a way they have come to expect.

Conference Agenda

Wednesday, August 14

7:30 am - 5 pm **Registration**
Ambassador Foyer

7:30 am - 9 am **Continental breakfast**
Mackinac Ballroom

9 am - 10 am **Concurrent Sessions**

SESSION 1 – MARQUETTE

Information Governance in an Age of Distributed Data

Michael Smith, Iron Mountain

Now more than ever, our data lives in multiple locations and formats and must be secured to very high standards. This session will take a holistic look at Information Governance from a legal, business, and technical perspective. Examples from states, the federal government, and private industry will lay the foundation of understanding for taking these tools back to your agency. Issues relating to IRS Pub. 1075 will also be discussed.

SESSION 2 – JOLIET

Analytics Everywhere

Ted London, FICO

This topic will explore analytics within audit selection, tax discovery, collections, and even customer service.

Conference Agenda

Wednesday, August 14

10 am - 11 am

Concurrent Sessions

SESSION 1 – MARQUETTE

E-Standards Update Panel

Terry Garber, FTA

Steve Thimsen, Idaho State Tax Commission

Learn about the current status of FTA's E-Standards Programs and learn how you can contribute.

SESSION 2 – JOLIET

Powering Identity Resolution and Insight with Next-Gen Technology

Mason Carpenter, Experian

As more and more consumer interactions go digital and identity fraud continues to evolve, effective identity resolution has become increasingly complex and important. This session will describe how Experian has applied machine learning to tackle this problem and unlock new insights on synthetic identities and other difficult identity challenges.

11 am – Noon

Networking Break

Mackinac Bridge

Noon

CONFERENCE ADJOURNS

E-Standards Meeting at a Glance

(Separate Registration Required)

Wednesday, August 14

Time	Location	Event
1 pm - 5 pm	Joliet	E-Standards Meeting: Modernized eFile and Summit Schemas

Thursday, August 15

Time	Location	Event
7:30 am - 9 am	Duluth B	Breakfast
9 am - 12 pm	Joliet	E-Standards Meeting: Employment Taxes and Related Schemas
Noon - 1 pm	Joliet	Working Lunch (Boxed Lunch Provided)
Noon - 5 pm	Joliet	E-Standards Meeting: Employment Taxes and Related Schemas

E-Standards Meeting Agenda

(Separate Registration Required)

Wednesday, August 14

1 pm - 5 pm

Modernized eFile and Summit Schemas

Joliet

- Review and voting on TY19 MeF Schemas including Security Summit changes and Change Requests
 - StateIndividual
 - StateBusiness
 - StateEstateTrust
 - NEW! StateExemptOrganization
- TPOS Update and Process Review
- Leads Schema Status Update

E-Standards Meeting Agenda

(Separate Registration Required)

Thursday, August 15

8 am - 9 am

Breakfast

Duluth B

9 am-5 pm

Employment Taxes and Related Schemas

Joliet

- FSETV6.0 Draft Review
- Employer Annual Filing Update
- LevyV2.1 Review and Approval
- EnrollmentDataExchange Review and Approval

Noon

Working Lunch (boxed lunches provided)

Joliet

Exhibitor & Marketing Partner Directory

Agissar

Booth # 315

Contact: Suzanne Rassiga

suzanne.rassiga@agissar.com

www.agissar.com

Company Description: Agissar's INFOPoll® system is an automated workforce and transaction tracking system for State Revenue operations. The software automatically captures time and volume data by tax type, task, and operator. Our software and ergonomic workstations improve the quality and efficiency of your document prep processes. Our Central Dispatch System lets you electronically tag mail trays and buckets with unique barcodes and assign a volume to that unit of work for tracking a variety of manual tasks.

ASR Analytics

GOLD PARTNER

Booth # 207

Contact: Becky Kraft

Becky.kraft@asranalytics.com

www.asranalytics.com

Company Description: ASR is a premier solution provider for State, Local and Federal Tax Authorities. ASR develops and deploys visionary products specifically designed for tax system administration, fraud and compliance. We combine industry expertise, information technology best practices, machine learning and predictive analytics across multiple disciplines to deliver measurable value to our clients. ASR's staff includes tax experts, economists, statisticians, and data scientists - all focused on delivering next generation solutions for the tax agencies of tomorrow.

Exhibitor & Marketing Partner Directory

Adelman Consulting

BRONZE PARTNER

Booth # 220

Contact: Chuck Adelman

cda@adelmanconsulting.com

www.adelmanconsulting.com

Company Description: Program management and IV&V services for today's world.

Axiomatic

Booth # 213

Contact: Dave Salzer

david@axiomnh.com

www.axiomnh.com

Company Description: Axiomatic is a specialized software development, business process reengineering (BPR), and project management firm with expertise in the analysis, development, and deployment of improved business workflows and software solutions for local and state government.

Exhibitor & Marketing Partner Directory

Credit Karma Tax

BRONZE PARTNER

Contact: Julie Magee

Julie.Magee@creditkarma.com

www.creditkarma.com

Company Description: The tax software for all of us! Over 75 million people trust Credit Karma® to help them build and make the most of their credit. Credit Karma Tax™ is committed to making tax filing easy, free and secure for all. 100% free from start to finish. File your federal and state taxes totally free of charge, with a maximum refund guarantee. Credit Karma Tax™ never charges for forms, filing or your refund.

Experian

SILVER PARTNER

Booth # 309

Contact: Dave Kregness

dave.kregness@experian.com

www.experian.com

Company Description: Experian Fraud & Identity Services: Experian works with Federal, State and Local governments to identify and prevent individual and business fraud. Specific to Taxation and Revenue Agencies, Experian works as a primary vendor for IRS and a number of States to stop Individual Income Tax Return fraud. Our analytics and modeling approach is collaborative and leverages the best of your high risk information and Experian's vast identity databases.

Exhibitor & Marketing Partner Directory

Fairfax Software

SILVER PARTNER

Booth # 313

Contact: Michael Minter

mminter@fairfaxsoftware.com

www.fairfaxsoftware.com

Company Description: Fairfax Imaging is now Fairfax Software. Founded in 1994 to provide solutions for data capture, forms processing and remittance for government and commercial clients, Fairfax Software solutions are used by 24 State Revenue Agencies for tax processing. Fairfax Imaging offers its Quick Modules suite of products, providing automation and data capture to virtually any form, payment, or electronic item received. Every day, our solutions process billions of dollars in remittances and millions of documents.

FAST Enterprises

GOLD PARTNER

Booth # 201 and 301

Contact: Beth Schattin

BusinessTeam@FastEnterprises.com

www.FastEnterprises.com

Company Description: Fast Enterprises provides software and consulting services for government agencies. We work with city, county, state, provincial and national governments to implement systems that are used to administer a wide variety of programs. We offer commercial-off-the-shelf (COTS) software that helps agencies reduce costs, improve service to constituents, maximize revenues and improve the efficiency of internal operations.

Exhibitor & Marketing Partner Directory

First Data

Booth # 308

Contact: Jason Clark

jason.clark@firstdata.com

www.firstdata.com

Company Description: First Data Government Solutions (FDGS), a Fiserv company, services federal, state, and local level governments, as well as higher education institutions, non-profit organizations, transit and utility companies. FDGS maintains over 250 government accounts, including Payment Processing, Project Management, Consulting, and Electronic Visit Verification services (AuthentiCare).

ibml

Booth # 312

Contact:

sales@ibml.com

www.ibml.com

Company Description: ibml intelligent capture solutions help state and local government entities meet the challenges of reduced operational budgets while enhancing the speed and quality of service to constituents. More state departments of revenue use ibml intelligent capture solutions for tax processing than any other technology of its kind. Complete, consistent, auditable and secure data capture helps government entities comply with continually evolving data privacy regulations.

Exhibitor & Marketing Partner Directory

Intuit

GOLD PARTNER

Contact: David Sullivan

David_Sullivan@intuit.com

www.intuit.com

Company Description: Intuit is the world's leading provider of financial solutions for individuals and small businesses. We use innovative technology to create business and financial management solutions to help power prosperity for small businesses, the self-employed and consumers around the world. It is also a partner with states in its participation in the Free File Program.

Mathtech

Booth # 307

Contact: Frank Nestore

fnestore@mathtechinc.com

www.mathtechinc.com

Company Description: Agency System & Process Modernization — Mathtech has a 50-year tradition of successfully completing projects and working collaboratively with our clients. Mathtech has significant experience working with jurisdictions to plan and implement system modernizations. Our consultants help agencies define goals and create a vision for new business processes and technology. We help define requirements, prepare RFPs, design enterprise architectures, develop Business and IT Strategic plans, implement databases and systems, and manage large projects.

Exhibitor & Marketing Partner Directory

Microsoft

GOLD PARTNER

Booth # 210

Contact: Stuart McKee

stuart.mckee@microsoft.com

www.microsoft.com/en-us/enterprise/government

Company Description: Microsoft enables digital transformation of tax and revenue agencies with an integrated, flexible, and trustworthy approach that offers a choice of public, private, and hybrid cloud services with security. With a tax revenue management strategy from Microsoft and our partners, you can deliver real-time insights on budget execution, anticipate and spot new revenue streams, improve a citizen's ability to interact with your agency and improve the operational efficiency of the agency itself. At Microsoft we want to empower every person and organization on the planet to achieve more.

RSI

GOLD PARTNER

Booth # 214 and 215

Contact: Jeff Huber

jhuber@rsimail.com

www.RSIdelivers.com

Company Description: Incorporated in 1996, RSI's mission is to streamline government operations and improve citizen services through the delivery of transformative technologies. RSI partners with clients on IT initiatives to improve customer service, increase operational efficiency and maximize compliance. With a dedicated team of business and information systems consultants and a suite of software solutions, RSI is one of the largest organizations of its kind dedicated to tax, labor and child support agencies.

Exhibitor & Marketing Partner Directory

SAS Institute Inc

GOLD PARTNER

Booth # 208

Contact: Deborah Pianko

deborah.pianko@sas.com

www.sas.com

Company Description: SAS is the leader in business analytics software and services, and the largest independent vendor in the business intelligence market. Through innovative solutions, SAS helps customers at more than 70,000 sites improve performance and deliver value by making better decisions faster. Since 1976 SAS has been giving customers around the world THE POWER TO KNOW®.

TDEC

Booth # 310

Contact: Denis Lyatkin

dlyatkin@tdec.com

www.tdec.com

Company Description: For 60 years, state and federal governments, commercial entities and nonprofit organizations have turned to TDEC to provide cost-effective solutions for labor-intensive functions, such as tax processing, document management, administrative support, call center assistance, financial processing and lockbox services. And TDEC has consistently delivered a quality product, on time, and on or under budget.

Notes

Notes

Notes

Notes



TECHNOLOGY CONFERENCE

FEDERATION OF TAX ADMINISTRATORS

Join Us Next Year!



August 9-12, 2020
Hilton Downton
Portland, OR



**FTA would like to thank the following companies
for their generous support of the
2019 FTA Technology Conference and Exhibition**

Gold Marketing Partners



Silver Marketing Partners

Experian

Fairfax Software

Bronze Marketing Partners

Adelman Consulting

Credit Karma Tax