

NATIONAL TAXPAYER ADVOCATE PUBLIC FORUMS

CONVENED BY NINA E. OLSON, NATIONAL TAXPAYER ADVOCATE

AND THE HONORABLE ROBERT P. CASEY, JR, UNITED STATES SENATOR, PENNSYLVANIA

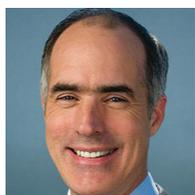
AUDITORIUM AT HARRISBURG UNIVERSITY OF SCIENCE & TECHNOLOGY | HARRISBURG, PA

FRIDAY, APRIL 8 | 10:00 - 11:30 AM



Nina E. Olson

Nina E. Olson, the National Taxpayer Advocate, is the voice of the taxpayer at the IRS and before Congress. Under her leadership, the Taxpayer Advocate Service helps hundreds of thousands of people every year resolve problems with the IRS and addresses systemic issues within the IRS. Her Annual Report to Congress identifies the most serious problems facing taxpayers and recommends solutions. In 2014, the IRS adopted the Taxpayer Bill of Rights for which Ms. Olson had long advocated, placing dozens of existing rights in the Internal Revenue Code into ten fundamental rights, and making them clear, understandable, and accessible for taxpayers and IRS employees alike. She is a graduate of Bryn Mawr College and North Carolina Central School of Law, and she holds a Master of Laws degree in taxation from Georgetown University Law Center.



Senator Bob Casey

Senator Robert P. Casey, Jr. is Pennsylvania's senior senator. He works every day on behalf of Pennsylvania families, fighting to create jobs, advocating for the education and well-being of children, and pursuing a national security strategy that protects our interests and supports those who serve our country. He serves on five committees including the Senate Finance Committee and Senate HELP Committee. Senator Casey and his wife Terese have four daughters and live in Scranton.



Robert Hamilton, Esq.

Robert Hamilton is the managing attorney for the Low Income Taxpayer Clinic at MidPenn Legal Services in Harrisburg, Pennsylvania, where he represents low income taxpayers in tax controversy matters before the IRS. He earned a B.A. degree in history from the Pennsylvania State University, and a J.D. degree from the Widener University School of Law. He is licensed to practice in Pennsylvania and before the United States Tax Court. Prior to joining MidPenn, he worked in private law firms throughout the Harrisburg region, providing legal services in the areas of estate planning and administration, real estate, and bankruptcy matters.



Susan D. Diehl, CPA, QPA, ERPA

Susan D. Diehl, the President of PenServ Plan Services, Inc., is a preeminent retirement plan and benefits expert. During her career, Susan has served on renowned committees at the Internal Revenue Service (IRS) including the Advisory Committee on Tax Exempt and Government Entities (“ACT”), where she contributed to the formation of the IRS’ 403(b) Liaison Group that provides support to employers and financial institutions dealing with 403(b) plans and brings issues involving these plans to the IRS, and the Information Reporting Program Advisory Council (“IRPAC”). In addition, Susan participated in various committees at the Department of Labor (“DOL”) including the ERISA Advisory Council. As an authority on retirement plans, Susan continues to testify before the IRS and DOL on retirement plan regulatory issues. Currently, Sue is serving as a Board of Director with the American Retirement Association (ARA). Susan is Past-President of the National Tax-deferred Savings Association (NTSA) and serves on the Leadership Council of this same organization. She is also a member of The American Society of Pension Professionals and Actuaries (“ASPPA”). In addition, she divides her time as Chair of the Tax-Exempt/Government Plans (“TEGP”) at NTSA as well as serving on the Government Affairs Committee (“GAC”) and the Legislative Relations Committee at ASPPA. Susan also served on the editorial team of the 403(b) Advisor Magazine.

In her spare time she volunteers as a host coordinator with the Interfaith Housing Alliance, sheltering and assisting homeless and displaced families find permanent housing.



Warren Hudak

After a distinguished U.S. Naval career and with more than 20 years of accounting and business consulting experience Mr. Hudak formed Hudak & Company to provide a strategic perspective to the accounting relationship. As a leader in the firm’s tax, accounting and consulting service areas, he provides advice on accounting, tax and other planning issues to a diverse group of closely held businesses.

Mr. Hudak graduated from Penn State University with a Bachelor of Science degree in Accounting and is an Enrolled Agent. Warren’s community roles include past Chairman of the Board and President for the Harrisburg Junior Chamber of Commerce, Penn State Urban Youth Development Committee, PA NFIB Leadership Council, PA NFIB Tax Committee Chair, PSEA Board, PSEA Government Relations Committee, NAEA PAC Committee, Intuit Customer Council, PA Unemployment Advisory Council, PA Minimum Advisory Board a member of PA State Chamber, Harrisburg Regional Chamber, York Chamber and Carlisle Chamber of commerce and participates on various policy committees.



Roger Eberlin

Roger Eberlin, U.S. Navy Veteran, is originally from Sonestown, PA. During his enlistment with the U.S. Navy from 1962-1966, he served as an Electronic Warfare Specialist, which led to him working on electronics after his time with the Navy. After his enlistment, he obtained a job at 3M, and while working there attended Goldey-Beacom college. Roger retired after 38 years with the company. Roger currently lives in West Grove, PA where he shared his life with his beloved wife for almost 45 years prior to her passing in 2014. When he isn’t playing his favorite bluegrass music with his band, he spends his days during retirement enjoying time with his grandchildren as much as possible.