



Scheduled Conference

37th Annual TEI-SJSU High Tech
Tax Institute
November 8 & 9, 2021

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36TH ANNUAL TEI-SJSU HIGH TECH TAX INSTITUTE IS FIRST VIRTUAL ONE

The 2-day TEI-SJSU High Tech Tax Institute was held virtually on November 8 and 9 with over 300 attendees. The program was shortened from prior years but still of excellent quality. We partnered with CalCPA to ensure high quality online delivery. The agenda can be found here: <https://www.sjsu.edu/taxinstitute/agendas/index.html>.

We hope to be back in person for the 37th Annual Institute on November 9 and 10, 2021 at the Crowne Plaza Cabana in Palo Alto. We might also have a virtual component given its popularity and that it was easy for people out of the area to attend. We'll post updates on this as we have them at <https://www.sjsu.edu/taxinstitute/>. We thank our speakers, sponsors and attendees for their flexibility and support.

FACULTY NEWS



Zachary Nolan, JD, LLM will start teaching BUS 225B, Corporate Reorganizations, in our MST program starting in spring 2021. Zachary is a transactional tax lawyer at DLA Piper LLP. He advises clients on a wide range of federal, state and international tax issues pertaining to all stages of a company's life, including entity selection and formation, financing, restructurings, mergers and acquisitions, cross-border planning, and tax-efficient dissolutions. The focus of Zachary's practice is to ensure his clients optimize their financial position by maximizing their tax benefit on a federal, state and international level. Prior to joining DLA Piper LLP, Zachary worked for PricewaterhouseCoopers in the Mergers and Acquisitions tax group.

Zachary received his LL.M in Taxation from New York University School of Law, his Juris Doctor and Business Law Certificate (Magna Cum Laude) from the Florida State College of Law, and his Bachelors of Science in Business Administration and Marketing (Cum Laude) from the University of Florida. During his Juris Doctor, he externed as a clerk for the Honorable Judge Stampelos of the United States District Court for the Northern District of Florida and for the Honorable Judge Ray of the First District Court of Appeal of Florida.

Welcome Zachary!

Tell your colleagues about our upcoming information sessions. All sessions will be conducted via Zoom. For more information, and to register, refer them to:
<http://www.sjsu.edu/lucasgsb/events/index.html>

FACULTY NEWS, CONT.



Professor Annette Nellen participated in several virtual conferences since spring including the AICPA Engage conference in June (COVID-19 law undoing of TCJA) and National Tax Conference in November (tax updates, plus tax doctrines for tax geeks part 2). She also spoke to the National Society of Accountants (on ethics) and the Minnesota State Bar Association (taxation of virtual currency). Annette's article, "Now is the Time To Start Fixing the Sales Tax Base," was published in *Tax Notes State* in September 2020. In August, the AICPA appointed Annette as co-chair of the Tax Compliance & Planning Discipline Task Force that will work to develop curriculum ideas related to the significant changes underway to the CPA exam.

STUDENT NEWS

Congratulations to Aarti Shah and Kimberly Puliafico Co-Outstanding MST Graduates for Summer/Fall 2020



"When I first enrolled in the MST program, my intent, like so many of my peers, was simply to gain the additional units I needed for the CPA licensure. That intent was "forgotten" after taking my first class in the program. Over the last year and a half, I have been endowed with a breadth of tax knowledge and professional opportunities that solidified my research and technical abilities to thrive in the tax sphere. Through this program and the amazing faculty, I was amazed to learn just how intricate and creative tax

can be when it is harnessed with a meticulous understanding of the rules and precedents.

To the incoming and current students of the program, I can't help but think there could not be a better time to be part of the MST program than right now with all the proposals and changes happening in the tax code. The educational foundation you build right now in your virtual classrooms will provide you the opportunities to thrive, and the relationships you build across screens will continue as colleagues in the tax field. There is no end to the process of learning in this program, but rather it's a constant journey of discovery and curiosity I hope you embark upon."
- Aarthi Shah



"The SJSU Masters of Taxation program provided me with the skill of how to research tax law and taught me often overlooked basics of taxation. In the MST program you will meet students that have no experience in tax to those who have been CPAs for decades. And I can say with certainty, whether you have been in tax for one day or twenty years, this program can and will benefit you in your

career. Professor Nellen and the other instructors have real world experience in tax and are there to help you learn. You will meet people and build relationships that will go beyond your time in the MST program. If you are interested in the program and wondering if you should take it, you should." - Kimberly Puliafico

ALUMNI NEWS

Leigh Ann Moore, CPA, MST



Leigh Ann Moore, CPA, MST, is Director of Tax Operations at Netgear, Inc. A SJSU accounting program graduate, she began her career as an auditor with Ernst & Young in San Jose where she earned her CPA. After working in financial accounting for several years, "I crossed over into tax and never looked back. I love the challenging work!"

At Netgear, Leigh Ann is focused on ASC 740 tax accounting, the federal & state income tax return compliance cycle, and management of the sales and use/property tax processes. She considers herself a corporate tax generalist after having developed these skills during roles with National Semiconductor, the IRS, Intuit, Xilinx, and eBay.

"I've been very fortunate in my career to have worked at organizations with incredibly interesting issues and amazing colleagues, giving me a broad background in corporate taxation. I really enjoy teaching and mentoring staff because I remember the first time I tackled these issues and needed guidance." Leigh Ann didn't enter the MST program until later in her career, after working as a single mom raising her two daughters. "The MST program was always a goal of mine, and it allowed me to really solidify my understanding of the underlying principles of taxation in a cogent way. It would have been great to have had that theoretical understanding from the start, but it's never too late."

Her advice for MST students is to be a life-long learner. "I've maintained my certification throughout my career, enjoying classes through TEI, the CalCPA Society, SJSU High Tech Tax Institute, or firms' webcasts. And, embrace tax technology – tax is always changing." She also advises to "fill your bucket with the big rocks" by making sure you focus on key skill sets at each position. "It may not be your dream job, but if you take on something specific from each opportunity, that's how you build your career." Outside of work, Leigh Ann enjoys hiking, gardening and traveling. A favorite trip was a 2-week drive/stay through New Zealand in 2019. "I plan to get back out there post-Covid!"

MST students and alums: Have news to share with others? Please send details to catherine.dougherty@sjsu.edu.