



# 2024 Fall Tax Symposium

Hosted by the Vermont Department of Taxes

Tuesday, October 22, 2024 | 9:30a.m. – 4:00p.m.

State Conference Room 110

111 State Street

Montpelier, VT

## Vermont Department of Taxes Biographies

### **Craig Bolio, Commissioner**

Craig Bolio was appointed Commissioner of the Department of Taxes by Governor Phil Scott in December 2019. Commissioner Bolio has served the department since 2011, with much of his time spent supporting and improving the operational side of the department. He has served as the department's Deputy Commissioner and, before that, focused on ensuring the successful implementation of the department's integrated tax processing system; VTax. Craig grew up in Vermont and earned a Bachelor of Arts in Economics and Political Science and a Master of Business Administration from the University of Vermont. He lives in Essex Junction with his wife, Kristen, and their dog, Frankie.

### **Rebecca Sameroff, Deputy Commissioner**

Rebecca Sameroff was appointed Deputy Commissioner of the Vermont Department of Taxes in December 2020. Deputy Sameroff is responsible for legislative initiatives, policy development, and analytical work for the department. Ms. Sameroff previously served the department as Chief Fiscal Analyst, supervising policy analysis, revenue forecasting, and analysis of the administrative impact and revenue implications of proposed policy changes, including distributional impact on Vermont taxpayers. Ms. Sameroff also served the City of Burlington as Special Advisor for Finance and Technology. Deputy Sameroff holds a Master of Public Administration from The Maxwell School at Syracuse University and a Bachelor of Arts in Anthropology from Northwestern University. Ms. Sameroff is an enthusiastic hiker, biker, and birder, and a former member of the Audubon Vermont Board of Directors.

**Biographies are listed alphabetically from here.**

### **Sharon Asay, Director of Finance, Revenue Accounting and Returns Processing Divisions**

Sharon Asay is the Director of Finance for the Vermont Department of Taxes. Prior to this role, she was the Director of the Division of Taxpayer Services. Sharon joined the department in 2007 and has been the director since 2009. Sharon came to the department with more than 20 years of experience in public accounting. Prior to joining the department, Sharon managed her own certified public accounting (CPA) firm in the state of New Jersey. Sharon has a bachelor's degree in accounting and is currently a licensed CPA in Vermont.

### **Will Baker, Assistant Attorney General and General Counsel, Vermont Department of Taxes**

Will Baker is an Assistant Attorney General and the General Counsel at the Vermont Department of Taxes. Before being appointed general counsel in January 2017, he was a department staff attorney for 10 years. Previously, he was in private practice with a Burlington law firm. Will is a past chair of the Vermont Bar Association's Young Lawyers Division and has served on the Bar Association's Board of Managers. He currently serves as chair of his town's school board. Will earned a bachelor's degree from George Washington University and a law degree from Northeastern University School of Law.

### **Paul Brodowski, Section Chief, Taxpayer Services Division**

Paul Brodowski has been employed with the Vermont Tax Department for over eight years. He started his tax career in Taxpayer Services as a Tax Examiner working within the Corporate and Business Income Tax Section. He now serves as a Section Chief handling the Real Estate Transfer Tax Section along with a variety of miscellaneous tax types. Paul graduated from Northeastern University in Boston with an MBA, and he is an Enrolled Agent (EA). Paul is married and lives in Williston, Vermont and has a son who attends the University of Arkansas. His hobbies included biking, golfing, hiking, and skiing, and he enjoys traveling to new destinations whenever possible.

### **Deborah Carroll, Principal Assistant to the Commissioner, Office of the Commissioner**

Deborah Carroll serves as the Principal Assistant to the commissioner's office where she helps with policy development and communications. She grew up in Vermont and is a graduate of the University of Vermont. Deb's background includes more than 20 years as a litigation paralegal and fitness instructor, and more than a decade as a freelance writer and photographer in Maine. Deb lives in the Mad River Valley, spends her free time planning adventures, and has served as a board member with the Maine Appalachian Trail Land Trust, Stanton Bird Club, Moretown Planning Commission and Clean Water Committee, and others.

### **John Demeter, Assistant Director, Taxpayer Services Division**

John Demeter works as the Assistant Director of Taxpayer Services. He formerly served as a Tax Compliance Corporate Audit Specialist to develop and implement data-driven audit programs and a comprehensive audit plan. John started at the department in 2004 in the Corporate and Business Income Tax Section of the Division of Taxpayer Services and worked closely with all aspects of the administration of those taxes, as well as the Economic Advancement Tax Incentive and Vermont Employment Growth Incentive programs for more than a decade. Prior to his time with the Department of Taxes, John worked in operations and management for several Vermont businesses and a nonprofit. John holds a bachelor's degree in public policy studies from Duke University and has completed coursework in the Master of Public Administration program at the University of Vermont and the accounting curriculum at the Community College of Vermont. John lives in Middlesex with his wife and daughter, and currently chairs the town's Zoning Board of Adjustment.

### **Jake Feldman, Senior Fiscal Analyst, Office of the Commissioner**

Jake Feldman has been with the Tax Department since 2014. He works on all the tax types the department administers, but much of his focus is on education finance and education property taxes. Jake's education finance contributions include the Commissioner's annual December 1st letter, policy work with the administration and legislature, and maintaining the statistics behind PVR's equalization study. Jake holds a bachelor's degree in economics from Middlebury and a master's degree in statistics from UVM.

### **Adam Gann, Business Analyst and Supervisor, Business Improvement and Implementation Division (BIID)**

Adam Gann started at the tax Department in 2017 as a business tax examiner, then served as a Support Coordinator for the VTax team. Adam is currently a Business Analyst and Supervisor on the BIID team. He has worked as the project lead for several new tax types implemented by the State of Vermont over the past several years, including the Abandoned Beverage Deposit, Cannabis Excise tax, and now the Child Care Contribution. Adam was born and raised here in Vermont and is heavily involved in his home community as a JV basketball coach and school board member, and he is also co-director of two non-profits based in Hardwick, Vermont.

### **Aaron Kaigle, Business Improvement and Implementation Division (BIID) Director**

In his role as BIID Director, Aaron Kaigle directs all changes to the department's primary processing software system, VTax. Aaron manages the department's subject matter experts and coordinates their work with the development teams. Aaron oversees the implementation of major initiatives for example: new tax types, annual software updates, and legislative changes. Aaron has worked for the department since 2013, serving in various roles, including executive staff assistant, Tax Examiner in the Trust and Corporate Tax sections, and subject matter expert during the implementation and support of VTax. Aaron lives in Williston, Vermont, with his partner and two children.

### **Alysha Leroux, Assistant Director, Compliance Division**

Alysha joined Tax and the Compliance Division in 2017 and worked in various audit positions including Tax Examiner, Support Coordinator, and Tax Audit Assistant Section Chief, before becoming the Assistant Director. She holds a bachelor's degree in psychology from Northern Vermont University and is working on a BS in Business Administration from Vermont State University. Alysha is a Vermont native and lives in Greensboro Bend, Vermont with her husband, daughter, and golden retriever.

### **Matthew Phillips, Appeals Attorney, Vermont Department of Taxes**

Matthew Phillips is an attorney and has been with the Department of Taxes for five years. In his previous position he did payroll for a law firm in Boston and prior to that, worked in landscaping and construction. Matt received his law degree from Vermont Law School in 2019 through an accelerated two-year juris doctor program and holds a BA in History from Saint Michael's College. Matt is originally from Massachusetts' South Shore and now lives in Montpelier, with his wife and their dog. Matt's wife is expecting their first child in December.

### **Lisa Pinkus, Tax Examiner, Division of Taxpayer Services**

Lisa Pinkus has been with the Tax Department for over fourteen years; she began her career as a seasonal temporary employee for two tax seasons before becoming a Tax Examiner in the Division of Taxpayer Services in 2008. Lisa began her college years studying education and later switched majors and schools to graduate with a degree in Business Management from Champlain College. Lisa was born and raised in Graniteville, Vermont, left to travel at the age of 21, then later returned to Vermont. She now lives in Montpelier with her two dogs, one cat, and two African side-neck turtles just a mile from the Tax Department. She enjoys spending time with her daughter and granddaughters in Milton, Vermont.

### **Abby Shepard, Executive Policy Advisor for the Office of the Commissioner**

Abby Shepard is an attorney and the Executive Policy Advisor for the Office of the Commissioner of the Vermont Department of Taxes. She previously worked as legislative counsel for the Vermont General Assembly, and at the Department as an assistant attorney general and a tax policy analyst. She earned her law degree and Master of Laws (LLM) from McGill University and holds a Bachelor of Arts in French and Francophone Studies from Barnard College. Originally from Addison County, Vermont, Abby lived abroad for over a decade before settling in Montpelier with her family.

### **James Whitehouse, Director of Taxpayer Services**

James (Jim) Whitehouse is the Director of Taxpayer Services for the Vermont Department of Taxes. He has served Vermont for thirty years: five years with the Agency of Transportation where he served as a Field Auditor; two years with the Department of Financial Regulation where he worked as a Financial Analyst; and 23 with Tax. During his career with Tax, he has served as Field Audit Supervisor, Assistant Director of Compliance, and Assistant Director of TPS. Jim is married with two children and lives in Huntington, Vermont, with his wife, Saint Maria. Jim enjoys the outdoors, hiking, skiing, and making fires, but is also content with a good book and a comfortable couch.