

AUBURN UNIVERSITY
2022 TAX PROFESSIONAL SEMINAR: Instructor Team

Christopher Bird, EA, CFP: Alabama, Arkansas, Georgia, Mississippi, Instructor for live and online

Chris Bird has been in the financial business for over 30 years. He started his career with a degree in Accounting and a minor in Business Administration. He also holds the Certified Financial Planner designation (CFP). Chris was a Senior IRS agent for 16 years. He began conducting courses after leaving the IRS and started his own company, Chris Bird Seminars, Inc. Chris went on to conduct over 125 seminars a year on accounting, financial planning, wealth building, residential rental property ownership, and tax strategies for the real estate and financial industries nationwide. He has presented his widely acclaimed courses multiple times at NAR conventions and most recently presented at Howard Brinton's StarPower™ Conference. Chris was an adjunct instructor at the University of Illinois in tax law for over 20 years. He is a Senior CRS Instructor and a Senior Faculty Instructor for the Realtors Land Institute. And he also teaches at all the Illinois tax seminars currently using the *National Income Tax Workbook* also used in the Auburn University programs. Chris has a unique way of making a tough subject (taxation instruction) entertaining and enlightening for our audience.

Michael Ferguson, CPA, CFP: Alabama, Arkansas, Georgia, Mississippi, Instructor

Michael Ferguson has over thirty years' experience in accounting, tax, and financial planning for businesses and individuals. Currently his practice is located in Guntersville, Alabama, where he works with clients from all over the country. He owned a firm in metro Atlanta early in his career and returned to northeast Alabama in 1987. In 2013, he formed a new partnership with his firm in Guntersville and opened the Gateway Group, LLC. He has been an Auburn University Tax instructor for the past twelve years. He holds a Bachelor of Professional Accountancy degree from Mississippi State University and served as a commissioned officer in the U S Army.

Joel C. Jones, CPA, CGMA: Alabama, Mississippi, Instructor

Joel is a shareholder at Kassouf & Co. in the Business Services group and works in the Auburn, Alabama office. He is a member of the American Institute of Certified Public Accountants, the Alabama Society of Certified Public Accountants and the Institute of Internal Auditors. He is also a member of the National Association of Certified Valuation Analysts and a member of the Valuation and Forensic Services Section of the American Institute of Certified Public Accountants. Joel is a Certified Internal Auditor (CIA) and a Certified Valuation Analyst (CVA), and he holds the Accredited in Business Valuation (ABV), Certified in Financial Forensics (CFF) and Chartered Global Management Accountant (CGMA) designations from the AICPA. Joel provides tax and consulting services to businesses and individuals operating in wholesale distribution, retail sales, real estate development, professional services and investments. He specializes in family owned businesses, partnership and corporate taxation, multi-state taxation, not for profits and works in the firm's business valuation area. He frequently teaches continuing education classes for staff and clients of Kassouf & Co., P.C. Joel received his Bachelor of Science degree from the University of Alabama at Birmingham in 1997.

Kelly H. Myers, EA, MBA, Tax Consultant: Alabama, Arkansas, Georgia, Mississippi, Instructor

Kelly is a tax consultant with Myers Consulting Group, LLC, based in Huntsville, Alabama. Mr. Myers primarily provides seminars, tax planning, consulting, and controversy services to clients across the United States which include individuals and large to small accounting firms. He spent 30+ years with the Internal Revenue Service (retired 2017) with the last 20 years working for the Washington, DC Headquarters as a Senior Technical Advisor. His IRS experience included official guidance projects, examiner and litigation technical support, and implementing new legislation. He leverages his decades of IRS and public accounting experience to strategically add value to a varied client base. He has developed efficient tax strategies in both preparation and controversy arenas. He has been a guest speaker for numerous CPA and EA continuing education events, IRS Nationwide Tax Forums, national tax associations, and others in both live settings and webinars. Mr. Myers serves on the Federal Tax Committee for the National Society of Accountants (NSA) and Internal Revenue Service Advisory Council (IRSAC). He has an MBA from the University of Tampa with emphasis in Accounting and Taxation. His BA is from Western Colorado University (Western State College) with a double major in Accounting and Business Administration and a minor in Economics.

Beanna J. Whitlock, EA: Instructor for online courses

Beanna is an Enrolled Agent in private practice, Whitlock Tax Service, LLC, located in Canyon Lake, Texas. She has been a tax law instructor for more than 40 years, with emphasis on Limited Liability Company, Ethics, and Professional Conduct presentations. Beanna has taught tax professionals across the country including her instruction assignments for Auburn University. She has testified before Congress, Treasury and the IRS Oversight Board and served on the IRS Information Reporting Program Advisory Committee as well as the IRS Commissioner's Advisory Council (CAG). She served as the IRS Director of National Public Liaison for Commissioner Mark Everson and is a recipient of the Commissioner's Award for Excellence of Service. She has been honored by Accounting Today as one of the 100 Most Influential in Accounting. Known for her fierce defense of the tax professional community, Beanna is frequently consulted by accounting and tax publications regarding issues concerning the tax professional community.

Auburn University Accounting & Tax Training Institute Staff:

• ***Alan Spencer, Program Developer, Auburn University Tax Seminar Coordinator:***

Alan Spencer joined the Auburn University Office of Professional and Continuing Education in 2016. He received his Bachelor's degree in English from Alabama A&M University. Alan worked as an executive, in the non-profit sector, bringing over 12 years of experience in development planning, public relations, marketing, public speaking, administration, communications, fund raising and customer service. He now serves as a Program Developer for OPCE Conference and Event services.