Ed Berkovitz
NYU Langone Medical Center

At NYU Langone Medical Center, Ed Berkovitz serves as the Director of Tax Reporting and Compliance, is a subject-matter expert, and is responsible for ensuring compliance with tax regulations at the local, state and federal levels. He takes a lead role in the preparation and filing of all Medical Center tax compliance and is a key resource in the effort to establish best practices and policies in this very important area, which reports to the Vice President of Finance.

Prior to his arrival at the Medical Center, Ed served as the Tax Director at Columbia University. He has also worked as a tax consultant for Deloitte & Touche, PricewaterhouseCoopers and Loeb & Troper. He is a graduate of the NYU Stern School of Business and the Benjamin N. Cardozo School of Law, where he earned a Juris Doctorate. Ed was admitted to the New York State Bar in May 2002.

Tricia L. Bires
University Hospitals Health System

Tricia L. Bires has been the Director of Treasury for University Hospitals Health System, an integrated health care system based in Cleveland, Ohio, since October 2003. Ms. Bires is responsible for system-wide tax compliance and research, daily cash management, short- and long-term investments, and debt and derivative transactions. She actively serves in a compliance role for outstanding debt, actively manages the System’s leasing program and provides support for 501r compliance, and community benefit reporting.

Ms. Bires currently serves on the University Hospitals Capital Committee, which oversees capital spending for the System, the University Hospitals Community Benefit Steering Committee responsible for overseeing System-wide community benefit reporting and compliance, and the Community Benefit Grant Program Review Committee, utilized to award System dollars to outside agencies in support of selected community benefit needs.

Tricia Brosnan
Pfizer

Tricia Brosnan is the Vice President, Global Tax Operations for Pfizer. In this role, Tricia is responsible for Pfizer’s global financial tax reporting. She leads the America’s Tax Center (ATC), which is responsible for US financial tax reporting and compliance. Tricia also co-leads Pfizer’s European Tax Center (ETC), which supports financial tax reporting and compliance for major European markets. Tricia is also actively involved in tax legislative activities and provides support to the tax planning, transfer pricing and audit groups within Tax. Prior to joining Pfizer, Tricia was with KPMG, LLP’s Federal Tax group for 10 years, where she advanced to the senior manager level.
Tricia received her BS in Accounting from Fordham University and her MBA from Columbia University. Tricia is a Certified Public Accountant in New York State. She is married with two children and enjoys running and cooking in her free time.

Ray Bunyard, CPA
Baylor Scott & White Health

Ray Bunyard is Vice President of Tax Services for Baylor Scott & White Health, the largest not-for-profit health care system in Texas, and one of the largest in the United States. Baylor Scott & White Health was formed from the recent combination of Baylor Health Care System and Scott & White Healthcare in October 2013. The combined system includes 49 hospitals, more than 800 patient care sites, 5,800 affiliated physicians, 38,000 employees and over $9.6 billion in total assets.

Ray has been with the new organization and Baylor Health Care System for over 18 years and is responsible for the direction and oversight of tax planning and compliance matters, including the community benefits reporting for the new combined system. He also participates in the physician contracting review and approval process and other business transactions for the system.

Ray is a Certified Public Accountant in the state of Texas and is a member of the Texas Society of Certified Public Accountants. He currently serves as a member of the IRS Gulf Coast Tax Exempt/Governmental Entities Council and has participated in several projects with the American Hospital Association, Texas Hospitals Association and other organizations regarding the Form 990 reporting, community benefit reporting and other tax-related issues facing nonprofit tax-exempt entities.

Pedro Cespedes, Jr.
Johnson & Johnson

Pete Cespedes is the Senior Regional Tax Director for Johnson & Johnson LATAM and is based in Miami, Florida. He is known for successfully driving tax related initiatives involving ASC 740, Sox compliance, and international local tax planning.

Pete received a Master of Science, Taxation from the University of Miami and a Bachelor of Business Administration, Accounting from the University of Notre Dame. Pete is fluent in Portuguese and Spanish.
Amy P. Chambers  
Eli Lilly and Company

Amy Chambers is a Senior Tax Director – International Tax in the global tax division at Eli Lilly and Company, with 25 years of tax experience. In her 20 years at Lilly, she has had experience in corporate tax, international finance and corporate financial planning. She currently oversees international tax and also has experience in tax rate forecasting and accounting, IRS examinations, transfer pricing and other tax advisory services. Prior to joining Eli Lilly, Amy was a tax consultant with Ernst & Young LLP for five years in Indianapolis IN, and Charleston WV. She earned her BS in Accounting from WV State University, and is a graduate of the Executive Development program at the Kellogg School of Management. Amy is a Certified Public Accountant.

Carolee M. Clarke-Reid  
Johnson & Johnson

Carolee Clarke-Reid is Director, Indirect Compliance at Johnson & Johnson’s US Tax Operations, Titusville, NJ. Johnson & Johnson is the world’s most comprehensive and broadly based manufacturer of health care products, as well as a provider of related services, for the consumer, pharmaceutical and medical devices markets.

In her position as Director, Indirect Compliance, Carolee is responsible for leading and expanding the US Indirect Tax Center. She is also responsible for leading various initiatives to redesign key tax processes in indirect, direct and reporting areas, and for introducing new technologies to the Center’s processes.

Since joining Johnson & Johnson in 2006, Carolee served in various Tax Department positions and led various initiatives, including developing and implementing a US. Indirect Tax Scorecard (KPIs); standardizing direct and indirect tax processes; implementing Vertex Q and O; and co-leading the development of the J&J Global Tax Competency model. She has also participated as a professional guest speaker at the University of Florida – Warrington College of Business, Rider University – College of Business Administration, and Tohickon Middle School (PA).

Before joining J&J, Carolee was a field auditor for the Commonwealth of Pennsylvania’s Department of Revenue, Bureau of Audits. She has her undergraduate degree in Accounting from Saint Francis University (PA), a master’s in Taxation & Financial Planning from Widener University, a master’s in Strategic & Organizational Leadership from Neumann University and is Lean Six Sigma – Green Belt Certified.

Dave Courtney  
Ardent Health Services

Dave Courtney has more than 20 years of tax experience in public and private industry, including the past 16 years with Ardent Health Services as the Vice President of Tax. Prior to his current position with Ardent, Dave held various tax positions with Behavioral Healthcare Corporation, Community Health Systems and Ernst & Young LLP. Dave received his
undergraduate degree in Accounting and a Master of Professional Accountancy (Tax emphasis) from the University of Utah. Dave is a member of the AICPA, Tennessee Society of Certified Public Accountants and a past president of Tax Executives Institute – Nashville Chapter.

Brian Deppe  
Intermountain Healthcare

Brian Deppe has more than 18 years of tax experience, eight of which were in public accounting, working for Deloitte and KPMG in Salt Lake City, Utah. He also spent three years in Deloitte’s national tax office in Washington, DC, in their not-for-profit specialty group. Over the years, he has worked with a variety of organizations, including the JC Penney Foundation, Providence Healthcare, US Ski and Snowboard Association, Huntsman Cancer Foundation, Nature Conservancy, University of Washington and the Ford Family Foundation.

Brian is currently employed as the Corporate Tax Director of Intermountain Healthcare, a not-for-profit health system based in Salt Lake City, Utah, and the largest health care provider in the Intermountain West. The system includes 22 hospitals, 1,400 employed physicians and more than 185 clinics. In addition to tax planning and research, his duties include leading or assisting the organization with all federal and state tax filings, including sales tax, property tax, payroll tax, and all international withholdings and filings.

Brian currently serves on the AICPA’s Exempt Organizations Technical Resource Panel and the Utah Association of Certified Public Accountants’ not-for-profit committee. He is also assisting with the establishment of a West Coast Area Tax Exempt (TE)/Government Entities (GE) Council.

Brian graduated from Brigham Young University’s Marriott School of Management with a Master of Accountancy degree (Tax emphasis).

Scott Dessing  
Takeda

Scott Dessing has been with Takeda since 1999, and presently is responsible for Takeda’s Global Tax Function.

Takeda, founded in 1781 in Osaka, Japan, is a global pharmaceutical leader with a focus on innovative medicines in the areas gastroenterology, oncology, central nervous system, cardiovascular and metabolic, as well as vaccines. Takeda has a presence in over 70 countries with a significant presence in Japan, U.S., Brazil, China, Russia & Europe.

Over the years, Scott has been responsible for starting-up and developing Takeda’s U.S., European & Emerging Market tax function and has supported multiple strategic transactions including the acquisition of Nycomed Group (2011), Millennium Pharmaceuticals (2008) and the split-off of TAP Pharmaceutical Products (former JV with Abbott Labs) (2008).
Scott has gathered significant experience in the area of transfer pricing, including concluding the first product lifecycle bi-lateral Advance Pricing Agreement between the U.S. and Japan along with supporting an application for treaty relief under the mutual agreement process with U.S. Competent Authority on a double taxation case. He led the structural optimization teams responsible for design and implementation of the Legal Entity Integration of Takeda and Nycomed for more than 20 countries, as well as Takeda’s Principal Company Project.

He is living with his wife and two kids, aged 4 and 6 years, in Zurich/Switzerland where he is currently based.

Karla Fisher  
Carle Health Care System

Karla Fisher serves as a senior accountant for the Carle Health Care System. Based in Urbana, Illinois, The Carle Foundation is the not-for-profit parent company of an integrated health system of hospitals, clinics, a 400+ member physician group, and for-profit health plan.

Karla joined Carle Health Care System in 2006. In her current role, she advises on and is responsible for the direction and oversight of the organization’s nonprofit tax-exempt federal and state return filings, and sales and use tax filings.

Karla earned her BBA in Accounting from McKendree University in 2004, summa cum laude.

David E. Flores  
Allergan

David Flores is a Director of Corporate Tax for Allergan. In this role, David is responsible for Allergan’s corporate federal and state audit controversy, tax compliance, federal and state corporate income tax credits, state income tax provision, state and local indirect tax and state and local negotiated incentives. He also has direct leadership roles involving corporate tax operations, several corporate tax integrations, federal tax provision, tax legislative activities, transfer pricing and tax planning.

Prior to joining Allergan, David was a Senior Manager with over 12 years of Big Four Public Accounting experience in both Federal and State and Local Tax including his tenure with the California State Board of Equalization.

David received his BS in Business Administration from the University of California, Riverside and his Master’s In Business Taxation from the University of Southern California. He is a certified public accountant licensed in California.
Steve Gilmore  
Ascension Health Alliance

Steve Gilmore is the Director, Capital Finance for Ascension Health Alliance. During his 20-year career at Ascension, Steve has had direct deal team participation in the structuring and issuance of approximately $12 billion of municipal health care revenue bonds. He has multiple responsibilities associated with the management of a $5 billion centralized debt financing program for Ascension Health Alliance, the nation's largest and highest-rated not-for-profit hospital system, including the oversight of Ascension's system-wide debt compliance program. In connection with this role, Steve has significant experience with project structuring, asset identification, private business use monitoring and calculation, remediation and the Voluntary Closing Agreement Program (VCAP).

Jeff Holtz, CPA  
Johnson & Johnson

Jeff Holtz is a Tax Director with Johnson & Johnson. In this role, Jeff works closely with the various business units on tax planning initiatives, as well as transfer pricing issues. He has broad experience with many issues including supply chain planning, reorganizations, network optimization and acquisition integrations. Jeff’s prior experience also includes extensive work in both international tax compliance and tax controversies.

Jeff joined Johnson & Johnson in 1996 and has held positions in both the Federal Audit and International Tax Groups. Prior to joining Johnson & Johnson, Jeff worked at Prudential Insurance Company of America and Arthur Andersen & Co. Jeff holds a BS in Accounting and a master’s degree in Taxation.

Ray Imbrogno  
Pfizer, Inc.

Ray Imbrogno is a Senior Director in Global Tax for Pfizer. In this role, Ray is responsible for Pfizer’s US Indirect Tax Operations and Global Tax Technology.

Prior to joining Pfizer, Ray spent a combined 27 years in Tax with AT&T, Lucent and Avaya in a variety of roles. In addition, he was the Executive Director for the Association for Computers & Taxation for six years.

Ray received his undergraduate degree in Business Administration from Upsala College and holds two master’s degrees – one in Accounting and one in Management from Fairleigh Dickinson University.

Ray is a member of the Association for Computers & Taxation and serves on their Board as a Past President.
Collin Imhof  
Celgene  

Collin Imhof is the Director of Transfer Pricing and Tax Counsel at Celgene. He is responsible for the development, implementation, oversight, and defense of Celgene’s global transfer pricing strategy and policy.

Prior to joining to Celgene, Collin was a manager in PwC’s National Transfer Pricing Controversy practice in Washington, DC. In that role, he advised and supported multinational companies around the world with their transfer pricing planning, compliance, and controversies. Collin focused on assisting companies to gain certainty through Advance Pricing Agreements, seek double taxation relief through Competent Authority resolutions, appeal transfer pricing adjustments and penalties arising from complex audits, and coordinate large global documentation and planning projects to comply with BEPS.

Collin earned his J.D. from the William and Mary School of Law and his B.A. in Economics from the Pennsylvania State University.

David G. Ingber  
Montefiore  

David G. Ingber is the Vice President – Finance – Accounting and Financial Reporting for Montefiore Health System, Montefiore Medical Center, Montefiore New Rochelle Hospital, Montefiore Mount Vernon Hospital and the Schaffer Extended Care Center. He serves as a Board Member and/or officer for several other Montefiore affiliates. He is responsible for consolidated financial reporting, accounting policies and procedures, treasury, tax reporting and compliance, general finance functions, payroll and special projects, including acquisition reviews and go-live planning.

David joined Montefiore in 1990 as Corporate Controller. During his tenure at Montefiore he has developed policies and procedures to strengthen organization-wide internal controls. He implemented a formal monthly financial statement close process that facilitates the timely and accurate consolidated reporting for approximately 40 legal entities that comprise the System’s consolidated financial statements, which are in excess of $4.5 billion. He led the implementation of the Finance modules of SAP and due diligence efforts for a number of hospital asset acquisitions. He led the Medical Center’s Medical Resident FICA refund project, resulting in a multimillion dollar refund. Since 2008 he has played a lead role in several acquisitions. David received a BBA in Accountancy from Baruch College of the City of New York. He is a Certified Public Accountant. He is a member of the American Institute of Certified Public Accountants, New York State Society of Certified Public Accountants and the Health Care Financial Management Association.
Dan Jensen
HCA

Dan Jensen is an assistant vice president in HCA’s Tax Research and Planning Department in Nashville, Tennessee. He has been with HCA since 1997 and is primarily responsible for acquisitions, divestitures, joint ventures, internal restructuring, consolidated regulation issues and accounting methods issues, with a focus on capitalization issues, as well as IRS controversy arising from these items.

Prior to joining HCA, Dan spent five years in public accounting with Deloitte in Nashville. His practice focused mainly on federal and international issues, and on the manufacturing and health care industry.

Dan received his BS in Accounting from Virginia Tech in 1990 and his MS in Accountancy from the University of Tennessee in 1991. He is a member of the American Institute of Certified Public Accountants, Tennessee Society of Certified Public Accountants and the Tax Executives Institute.

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Mike Kurowski
Community Health Systems

Mike Kurowski has been with Community Health Systems (CHS) since February of 1998. Prior to joining CHS, Mike worked for Ernst & Young LLP in both the New York and Nashville offices. While in New York, Mike worked in EY’s media and entertainment tax group. During this time, Mike prepared individual tax returns for high net worth individuals and executives of EY’s media and entertainment corporate clients. He also prepared and reviewed consolidated corporate income tax returns and partnership tax returns for several real estate investment partnerships, as well as prepared income tax provisions for various media and entertainment clients. Mike had the opportunity during this time to work on several high profile media and entertainment corporate accounts, including the Marvel Entertainment Group, New Line Cinema and Major League Baseball. Mike transferred to the EY Nashville office in 1995 and worked on various tax engagements for the office’s health care clients. One of those engagements included two years of supervising the partnership tax return preparation for HCA’s physician joint venture partnerships.

Mike’s current primary area of focus at CHS is to manage all federal and state income tax audits. He has served in this role for the past eight years at CHS and has worked with various IRS agents through the years, including participating in a few IRS Appeals cases for CHS. During his 17+ years career with CHS, Mike has also worked in several other functional areas of tax, including the following: tax financial reporting, strategic tax planning, corporate and partnership tax compliance, sales and use tax issues, and unclaimed property audits. Mike also handles areas related to intercompany debt and corporate intercompany management fee charges. Currently, Mike is also assisting with the development of and transition to a tax procurement company in connection with CHS’ migration toward a company-wide shared services center.
Mike graduated summa cum laude from the University of Tennessee – Knoxville, earning his undergraduate degree in Accounting in 1992. He received his Master of Accountancy degree with a Tax concentration in 1993 from UT – Knoxville.

Mauro L. Macioce  
University of Pittsburgh Medical Center (UPMC)

Mauro L. Macioce currently serves as Vice President of Corporate Tax for the University of Pittsburgh Medical Center (UPMC). UPMC is a $11 billion, 62,000 employee integrated health care and delivery system which spans the full spectrum of health care delivery with its network of more than 20 academic, community, and specialty hospitals and 400 outpatient sites, insurance services, and international and commercial services.

Before joining UPMC in July 2009, Mauro served as the Director of Taxes for Allegheny Energy Company and Duquesne Light Company. He also was the Director of Taxes for Interstate Hotels Company, a large Hotel Management and Real Estate Development Company. Prior to Mauro’s corporate work experience, he spent ten years in the audit and tax practices of PricewaterhouseCoopers and Deloitte.

Mauro received his undergraduate degree in accounting from the Pennsylvania State University and his masters in taxation from Robert Morris University. Mauro is also a certified public accountant.

Brian T. McCullough  
Acadia Healthcare

Brian McCullough is Vice President of Tax at Acadia Healthcare, responsible for corporate federal, state and foreign income taxes, state and local franchise taxes, business taxes and property taxes. Prior to joining Acadia, Brian was Vice President of Tax and Treasurer for HealthSpring, Inc. for approximately six years, where he was responsible for overseeing all tax matters as well as the organization’s credit facilities, investments and real estate activity. Before joining HealthSpring, Brian was Director of Tax and Treasurer for Spheras, Inc. for three years. Prior to working in industry, Brian worked in public accounting for approximately seven years for Arthur Andersen and Ernst & Young LLP.

Brian graduated with a Master of Accountancy degree from the University of Tennessee, Knoxville in 1996 and is a Certified Public Accountant in the state of Tennessee.

Mike McCullough  
Banner Health

Mike McCullough is a Tax Consultant for Phoenix-based Banner Health. Banner Health is recognized as one of the top health systems in the country. Banner Health operates 29 hospitals, including three academic medical centers, and other related health entities that service seven states (Alaska, Arizona, California, Colorado, Nebraska, Nevada and Wyoming).
Banner Health has rapidly evolved from a health system of hospitals to a fully integrated system that includes significantly expanded services through Banner Health Network, Banner Medical Group and, in 2015, Banner – University Medicine. Banner employs about 47,000 employees.

Mike joined Banner Health 14 years ago. Before joining Banner Health, Mike was a Tax Manager at a major public accounting firm and then was a Tax Specialist for a Fortune 500 company.

Mike’s duties at Banner Health include coordinating the federal and state income tax return preparation for Banner Health and its 69 subsidiaries, managing all state and local property tax activity, managing all state and local sales tax activity, Form-1099 preparation, and developing practical applications for technical pronouncements and regulatory mandates.

Mike received his BS in Accounting from Arizona State University and is licensed as a Certified Public Accountant in the state of Arizona.

Mollie L. Miller
Fresenius Medical Care North America

Mollie L. Miller is the State Tax Director for Fresenius Medical Care North America. Her responsibilities include managing all aspects of state taxation, including planning, compliance and audits for state income/franchise tax and sales tax, M&A due diligence and legislative monitoring. Prior to joining Fresenius, she was a senior manager at KPMG in the Boston, MA, State and Local Tax practice. Mollie is a CPA and received her BS in Accounting from Babson College and her JD from Suffolk University School of Law. Mollie is a member of the Board of Trustees for the New England State & Local Tax Forum and has participated as a speaker or facilitator at Council on State Taxation (COST) meetings, the Institute of Professionals in Taxation (IPT) Sales Tax meeting, and the New England State and Local Tax Forum.

Matt Musso
Surgery Partners, Inc.

Matt Musso is the Vice President, Tax Services, of Symbion Healthcare, which owns and operates a network of outpatient ambulatory surgical centers and specialty surgical hospitals. Prior to joining Symbion, Matt worked with Ernst & Young LLP in Nashville for nine years, specializing in the for-profit health care provider industry.

Matt received his BS and MAcc degrees from The University of Tennessee, Knoxville. He is a Certified Public Accountant and an active member of the Tax Executives Institute – Nashville Chapter. Matt and his wife live in Nashville and have two children.
Kevin P. Nowell  
Presbyterian Healthcare Services

Kevin Nowell is the Enterprise-Wide Director of Tax for Presbyterian Healthcare Services, a 501(c)(3) tax-exempt integrated delivery system headquartered in Albuquerque, New Mexico. Presbyterian owns or operates 8 hospitals; 40 primary, specialty and urgent-care clinics with more than 790 employed physicians and other providers; three ambulance services; and a for-profit health maintenance organization with over 420,000 members.

Kevin is responsible for all tax planning, research and compliance matters for the system. He has a combined total of 19 years of experience in health care at Presbyterian, an acute care hospital in Salt Lake City, and a national third-party administrator. In addition to his tax responsibilities, Kevin is Director of Payroll and Accounts Payable. Kevin is a Certified Public Accountant.

Jacqueline A. Perrotti  
Actavis, Inc.

Jackie Perrotti is the Executive Director, Tax for Allergan, a global pharmaceutical company headquartered in Dublin, Ireland. Allergan is focused on developing, manufacturing and commercializing innovative branded pharmaceuticals, high-quality generic and over-the-counter medicines and biologic products for patients around the world. Allergan markets a portfolio of best-in-class products that provide valuable treatments for the central nervous system, eye care, medical aesthetics, gastroenterology, women’s health, urology, cardiovascular and anti-infective therapeutic categories, and operates the world’s third-largest global generics business, providing patients around the globe with increased access to affordable, high-quality medicines. Allergan has commercial operations in approximately 100 countries. In her role she is responsible for the global Tax Accounting and Reporting and US International Tax Compliance. She joined the Company in 2013 with the acquisition of Actavis, a generic pharmaceutical company located in Iceland and has integrated several large acquisitions into the companies consolidated income tax reporting and compliance, including Actavis, Warner Chilcott, Forest Laboratories, and Allergan. Prior to this role, Jackie was the Director of Tax at Rockwood Specialties Inc., a $3.8B specialty chemical company for 7 years, where she was responsible for Tax Accounting, Reporting and Compliance. She started her tax career at AT&T and held various tax positions with increasing responsibility over the years including responsibility for the Tax Accounting during many large acquisitions and dispositions.

Jackie has a Bachelor of Science in Accounting from Bryant University, a Master's of Science in Taxation from Seton Hall University, and is a NJ Certified Public Accountant. She belongs to both the NJ Society of CPA’s and the AICPA. In her spare time, she is a volunteer and coach for the New Jersey Special Olympics Hunterdon Independents.
**Reed Seabright**  
**CHRISTUS Health**

Reed Seabright is the Director of Tax for CHRISTUS Health, a large Catholic health care system, based in the Dallas area, with operations in Texas, Louisiana, Arkansas, New Mexico, Georgia, Iowa and several Latin American countries.

In his current role, Reed and his team are responsible for the filing of, and/or advising on issues related to, federal and state tax-exempt entity filings, federal and state income tax, sales and use tax, unclaimed property, payroll tax, property tax and excise tax.

Reed is a Certified Public Accountant, licensed in the state of Minnesota. He has more than 20 years of tax experience, and previously served in the tax departments of the Mayo Clinic and CHE Trinity Health, as well as having worked for the MN Department of Revenue and two large public accounting firms.

**Jerimi Ullom**  
**Hall Render**

Jerimi Ullom's legal practice is devoted to assisting various parties in financing matters. He serves as borrowers’ and bond counsel to the firm’s hospital and health system clients and also routinely serves as lenders’ and/or underwriters' counsel in health care financing transactions. Mr. Ullom advises the firm’s clients in all aspects of financings, including consideration of various financing structures, identification of assets to be financed and ongoing tax compliance. He is often involved with firm clients in the earliest stages of a financing, assisting them with the appropriate structuring, negotiation and, ultimately, the documentation of the transaction. Such a consulting approach to financing projects provides value to the firm’s clients, exceeding the traditional attorney-client relationship. While resident in the firm's Indianapolis office, Mr. Ullom has served as counsel in transactions throughout the country.

Mr. Ullom is a graduate of DePauw University in Greencastle, Indiana, and DePaul College of Law in Chicago, Illinois. When not drafting trust indentures, he enjoys playing golf, coaching basketball and spending time with his wife Kristin and their four children.

**Robert F. Waitkus**  
**Cleveland Clinic Health System**

Bob Waitkus is the Senior Director of Taxation and Compliance for the Cleveland Clinic Health System. In this position, Bob is responsible for all aspects of the Health System’s tax reporting and compliance, tax planning, tax audits and tax-exempt bond compliance. The Cleveland Clinic is a not-for-profit, multispecialty academic medical center and health system that integrates clinical and hospital care with research and education operating in Ohio, Florida, Nevada and Canada.

Bob has over 30 years of tax and accounting experience in both public accounting and industry. He has spoken frequently on tax matters and related accounting issues.
Bob received his BS in Business Administration, majoring in Accounting, from Bowling Green State University. He received his Master of Business Administration from Case Western Reserve University. Bob is a licensed Certified Public Accountant and a member of the American Institute of Certified Public Accountants and the Ohio Society of Certified Public Accountants.