

2025 INSTRUCTOR & ADVISER PROFILES UVM EXTENSION INCOME TAX SCHOOLS

Seth Anderson, EA, is the owner of Birch Tree Tax, LLC in Shelburne, Vt. His practice focuses on individual and business tax preparation as well as small business consulting. He is the coordinator of the UVM Extension Tax Schools and a contributing author to the Land Grant University Tax Education Foundation's National Income Tax Workbook. Seth graduated from Bryant University with a concentration in accounting and served in the U.S. Army and Vermont Army National Guard for over five years.

Sharon Asay, CPA, is currently the Director of Finance for the Vermont Department of Taxes. Sharon joined the Department in 2007 and served as the Director of Taxpayer Services for over 12 years. She became the Director of Finance in 2020. The Finance Division oversees Revenue Accounting, Returns Processing, Forms Administration and Building Security and Personnel Management for the entire Department. Sharon came to the Department with over twenty years of experience in public accounting. Prior to joining the Department, Sharon managed her own Certified Public Accounting firm in the state of New Jersey. Sharon has a bachelor's degree in accounting and is currently a licensed Certified Public Accountant in Vermont.

Jennifer Bouchard, CPA, has been a Farm Tax Specialist for Farm Credit East, ACA for the last 6 years. She is a 2001 graduate of the University of Vermont with a BS in Business Administration. Prior to joining Farm Credit East, ACA Jennifer spent time working with PricewaterhouseCoopers, LLP and Aon Insurance Managers. She specializes in CenterPoint Accounting Software and QuickBooks. After being raised on her family's farm, Jennifer, her husband and 3 children now run their own grass fed organic dairy farm in northern Vermont.

Molly Bucci, Esq. is an estate planning attorney at Primmer Piper Eggleston & Cramer. She has decades of experience helping families achieve their personal and financial estate planning objectives. She also provides counsel to both fiduciaries and beneficiaries in all aspects of trust, probate, and estate administration. Her practice also includes business succession planning, business formation and real estate law as they relate to estate planning issues. Molly is active in her community and is involved in many organizations. She has served on the Vermont Supreme Court Advisory Committee on Rules of Probate Procedure Committee and currently is on the boards of the Vermont Children's Trust Foundation and SSTA (Special Services Transportation Agency).

Jason Cadwell, CPA/PFS, CFP®, is a veteran of 21 tax seasons with Gallagher Flynn. He started Vermont Pure Financial, Inc. in 2004 to provide hourly financial planning services. As he is not tied to product or managing assets as part of his business model, his clients' economic resources are varied, and he can tailor his services to meet most needs. Under the adage that the easiest way to make a small fortune is to start with a big one, he spends as much time reviewing client's spending as their earning. This approach manifests in aligning spending with client's values and goals as well as managing the cost of college, investment management, taxes, and risk coverage.

Kerry Claffey is the owner of Copper Hill Tax Services in South Royalton. Tax Preparation is a retirement job for Kerry who retired in 2018 from a 30-year career in the Army Corp of Engineers researching sea ice and mountaintop icing. Kerry started into the non-profit world in the mid-1990's when he was guilted into becoming treasurer of his community church. He soon learned that despite "Separation of Church and State" there is a lot of involvement between the Church and the IRS. He took training offered by the church (UCC) conference and a lot of reading of IRS requirements for church organizations to make sure he was doing everything correctly. When Kerry started his tax preparation service he stumbled upon a nearby, multiday IRS workshop on non-profit organizations requirements adding an understanding of general non-profits to his knowledge of Church-IRS requirements. Kerry has over 30 clients who he prepares 990/990 EZ forms and continues to update his training in the non-profit area. Kerry is a member of Common Good Vermont, a statewide organization for Vermont Non-Profits and the people who support them.

John Demeter is the Assistant Director, Division of Taxpayer Services, and has served the Department of Taxes for over 20 years, working primarily with corporate and business income tax in the Taxpayer Service and Compliance Divisions. He's also invested significant energy in developing and deploying audit discovery programs – using wide-ranging data to identify and address significant underpayment of tax. Prior to his time with VDT, he worked for several small and medium-sized businesses in operations and management. John holds a Bachelor of Arts in Public Policy Studies from Duke University and has pursued graduate work and continuing education in accounting, public administration, and organizational development. John lives in Middlesex with his wife and daughter. In addition to enjoying time with his family and taking care of his property, he is passionate about music, snowboarding, the outdoors, and cooking and eating.

Rena DiGregorio works as the Assistant Director of Finance at the Vermont Department of Taxes. Rena holds an associate's degree in liberal studies, a bachelor's degree in accounting, and is currently actively studying for her MBA with Public Administration certificate at Champlain College. She joined the department in 2015 in the Taxpayer Services Division and spent much of her time focused on process improvement within the VTax project team. In 2021 she transitioned to her role on the finance team, focusing on numerous areas of work around the entire department. Rena lives in Hardwick with her husband and two beautiful little girls (ages 4 and 1).

Sandra Enman, CPA, has focused on tax planning and tax preparation for 37 years. She began her career working for a large local firm transitioning in 1987 to her own business in Williston. With the metamorphosis of her clients through the stages of their lives, she developed a special interest in trusts and estates along with charitable strategies. In 2016, her company merged with A.M. Peisch & Company, LLP in Colchester. She is a member of the Vermont Society of CPAs and currently serves on the board of the Vermont Tax Practitioners Association.

Jeff Fothergill, CPA, is Principal Emeritus, Fothergill Segale & Valley, Montpelier (now an Archer Lewis firm). Jeff joined the firm in 1981 after five years with the State Labor and Industry Department and received his CPA license in 1983. He has a bachelor's degree in accounting from the University of Vermont. Jeff has served two stints on the Governing Council of the American Institute of CPAs. In addition to participation in various committees, he has been a director and president of the Vermont Society of CPAs. Jeff stepped down from full-time work in 2019 but has continued a small diet of small business income taxes and ownership transitions since then. Over the years, Jeff has conducted classes for small businesses, bankers, judges, Realtors, attorneys and other tax practitioners and CPAs.

Joan Holloway, CPA, concentrates her tax compliance and consulting practice in the areas of individual and small business taxes and is a QuickBooks consultant. She began working in public accounting in 1995, and prior to that was the accounting manager for a local non-profit. She has taught Federal Taxes and Accounting Information Systems as an adjunct instructor at Champlain College. She graduated from SUNY Brockport, cum laude, with a B.A. in Business. Joan is a member of the Vermont Society of CPA's, currently serves on the board of the Vermont Tax Practitioners' Association, and was appointed to the Tax Administration Advisory Board by the Vermont Commissioner of Taxes.

Mark A. Langan is a tax attorney at Dinse, P.C. in Burlington. Before joining the Dinse firm in 1996, he practiced law in Manchester, New Hampshire since 1981. Mr. Langan is the current chair of the Probate and Trust and Law Section of the Vermont Bar Association, a fellow in the American College of Trust and Estate Counsel (ACTEC), and editor of and contributor to A Practical Guide to Estate Planning in Vermont. As Chair of the Probate and Trust Law Section of the Vermont Bar Association, he chaired the committees of the Vermont Trust Code, the Uniform Power of Attorney Act, the Uniform Trust Decanting Act and the statutory Tenants-by-the-entirety Trust Act. Mr. Langan is a former chair of the Tax Section of the New Hampshire Bar Association. Best Lawyers has named him "Lawyer of the Year (2021) - Burlington in Trust and Estates." He is a graduate of Georgetown University Law School and the University of California-Berkeley.

Elisia Laramee, CPA, is a tax senior manager at Gallagher, Flynn & Co. (GFC) specializing in tax consulting for credits and incentives, with an extensive background in helping clients identify, document, and support R&D credits. Prior to rejoining GFC in 2019, she spent eight years at RSM US LLP in Boston, Massachusetts focusing largely on R&D credits and compliance for large multi-state C corporations. Prior to that, she was with BDO in Los Angeles, California, for three years focusing primarily on R&D credits amongst other general tax services. Elisia started her career with GFC in 2007 after graduating from the University of Vermont with a Bachelor of Science in Business Administration with a concentration in Accounting and a minor in Statistics.

Stephanie Machia, EA, is an owner of Young’s Accounting LLC in Enosburg Falls, Vt. She graduated from Niagara University, Niagara Falls, N.Y. with a BS in Business Administration. She has worked with her family in the business for over 25 years., serving individuals, small businesses, and farms. She has served on the VTPA board, the Enosburg Business Association, and the Enosburg Falls Country Club Board of Directors.

Alicia Marcy, EA, has been a Farm Tax Specialist for Farm Credit East, ACA for the last 10 years. She is a Champlain College graduate and earned her EA in 2018. She specializes in CenterPoint Accounting, QB Desktop, and QB Online software. She grew up on her family’s farm in Vt. and served in the grocery and fuel industries prior to joining Farm Credit East, ACA. She enjoys music and spending time with her husband, 10-year-old son, and their cats. She also takes great joy in sharing her knowledge with others so they have the tools they need to succeed.

Lela McCaffrey, CPA, CFP®, works for Marble Trail Financial based in Middlebury, Vt. and Portland, Maine. She spent many years working in a traditional CPA firm, but as more and more clients asked for financial planning work, and she realized how much she wanted to be able to expand her client relationships and went back to school to gain that designation as well. She found her home at Marble Trail, which is an investment advisory and accounting firm, providing financial planning, investment management, tax preparation, and business accounting assistance. As a CPA and CFP®, she works in all sides of the business, providing holistic financial advice for clients year-round.

Joseph McCarthy, CPA, is a retired Senior Stakeholder Liaison with the Stakeholder Liaison Field division of the Internal Revenue Service. He had been doing outreach and working closely with tax practitioners for over 20 years. Prior to this, he was a Revenue Agent with the Internal Revenue Service for 9 years. Joe's territory includes both Vermont and Connecticut. He has over 30 years of accounting experience. He has Bachelor of Science degree in accounting from Quinnipiac College in Connecticut and he is a Certified Public Accountant.

Brian R. Murphy is an experienced corporate and tax attorney active (albeit now working part-time) in counseling closely held businesses and tax-exempt organizations on a wide variety of business and tax matters, including business formation and structuring issues, mergers and acquisitions, executive compensation, and employee benefits (including 409A compliance), tax planning, and representing clients before the IRS. Before forming Rack Road Advisors, PLC in 2023, he was a partner at Dinse P.C., a full-service law firm in Burlington, Vermont, for over two decades. Prior to joining Dinse P.C., Mr. Murphy was a partner at Young Conaway Stargatt & Taylor, a nationally recognized corporate and bankruptcy firm based in Wilmington, Delaware. Prior to practicing law, he practiced for six years as a certified public accountant with the Boston Office of Ernst & Young, LLP. Mr. Murphy is listed in the 2005-2021 editions of “America’s Leading Lawyers for Business” published by Chambers and Partners USA. He is a graduate of Suffolk University Law School (summa cum laude, 1991) and Providence College (1984). He enjoys cycling, hiking, high school sports, and is active in his local church.

Lisa Pinkus currently serves as Section Chief in the Personal Income Tax section in the Taxpayer Services Division. Lisa attended Johnson State College and Champlain College with a major in Business Management and a Minor in Education. Lisa has been with the Vermont Department of taxes for 17 years starting her career as a temporary employee and advancing through the ranks to Section Chief. Lisa lives in Montpelier with her two dogs, one cat, and two aquatic turtles and loves spending her summers in Isle LaMotte in her camper at Sunset Rock RV Park.

Kuroosh Sarafzade began his career in Montreal after earning a Bachelor of Arts from McGill University and later a Bachelor of Commerce from Concordia University. About ten years ago, he was introduced to HerrickGlobal and discovered that tax advisory work offered a meaningful way to help others. Over time, he developed a deep interest in the international aspects of U.S. tax compliance and cross-border planning. In 2024, Kuroosh earned a Master of Accounting degree, Tax Concentration, from the University of North Carolina at Chapel Hill, further strengthening his expertise in international taxation. He currently commutes from Montreal but plans to relocate to Vermont in the near future.

John Scheer, CPA, is President and managing shareholder of Scheer & Hickey, P.C. in Colchester, Vt. John graduated from UMass-Amherst in 1977 and is a member of the American Institute of CPAs. John worked for three different accounting firms in Boston and Vermont before starting his own practice in 1992. His firm's focus is tax planning and preparation for closely held businesses and individuals. John has been teaching at the UVM Tax School for over ten years and has conducted classes for various business groups. John has served on various nonprofit boards and is currently treasurer of the Vermont Senior Games Association.

Claude Schwesig, CPA, B Comm., received his Bachelor of Commerce with Honours in Business Administration from Sir George Williams University in Montreal. Claude was initially employed in the textile industry in Montreal and then was the Secretary-Treasurer of Sutton, Québec. He subsequently received a graduate diploma from the Université de Neuchâtel in Switzerland. After establishing his own accounting practice in Quebec focusing on U.S./Canada tax matters, he relocated to the U.S., completed courses at the University of Vermont in U.S. Taxation and Business Law, and received his CPA license in 1987. Claude has focused on U.S./foreign tax situations for over thirty years and co-authors the chapters on International Tax Matters for the national LGUTEF annual textbook. He is an owner and President of HerrickGlobal and has served as President of the Vermont Society of CPAs and is a member of the American Institute of Certified Public Accountants. Claude is also a licensed Insurance Producer (Life) in California and is presently developing a financial advisory practice in the Los Angeles area.

Ashlie Smith, MS Accounting, is a graduate of Champlain College and owner of Elite Financial Services, an independent tax and business consulting service. Ms. Smith serves as the President for the Vermont Tax Practitioners Association and is active in her community, serving as treasurer for several non-profit youth organizations and as a consultant to local businesses. She is also passionate about health and wellness coaching; inspiring others to lead their strongest and best lives.

Arlon Warner, EA, is the sole proprietor of a small home office tax business. He is a 1972 graduate of Johnson State College with B.S. in Math and Economics and has over 45 years of experience in personal and business income tax returns. Arlon specializes in military returns resulting from 35 years of service in the Vermont Army National Guard. He is and has been a member of NATP (National Association of Tax Preparers) and VTPA (Vermont Tax Practitioner’s Association) for several years and was on the VTPA Board for six years when he served as Secretary. He is on the State Chapter of NATP serving as a board member and President. He is also a member of NAEA (National Association of Enrolled Agents). Finally, Arlon serves on the TAAB (Vermont Tax Administration Advisory Board).

Rebecca Wasserman is the first Executive Director of VT Saves, a new public retirement savings program. She is a former legislative counsel of the Vermont General Assembly’s office of Legislative Counsel. Becky is a graduate of the University of Pennsylvania and holds a master’s in European political economy from the London School of Economics and Political Science and a law degree from Brooklyn Law School. She is co-founder of the Vermont Asylum Assistance Project, a nonprofit serving asylum seekers in Vermont.

UVM Extension Income Tax School – Advisers and Facilitators

Lauren Jarvi, EA, is a self-employed tax practitioner with over forty years’ experience in the preparation of individual and small business tax returns. She is enrolled to practice before the Internal Revenue Service and advises and represents clients in a wide range of tax matters. She is an active member of the Vermont Tax Practitioners’ Association and is a member of the National Association of Enrolled Agents and the National Association of Tax Professionals. She has served on the Board of Directors of the Northern New Society of Enrolled Agents and has also been an instructor and planner for the annual UVM Income Tax School for many years. Lauren was appointed as a charter member of the new Vermont Tax Administration Advisory Board as of 2022. She received her B.S. from the University of Vermont.

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