



Member Brochure



*... for the implementation of sound,
long-term tax policies that
promote the global competitiveness
of the U.S. technology industry.*

The Silicon Valley Tax Directors Group is composed of representatives from leading technology companies with corporate offices predominantly located in the area between San Francisco and San Jose, California (widely known as “Silicon Valley”).

The group engages with global tax policy makers for the purpose of sharing information about the technology industry and enabling open dialog regarding tax policy. It was formed in 1981 with current members representing the following companies:

Organization	Representative
Cisco Systems, Inc.	Robert F. Johnson; Senior Vice President, Global Tax and Customs (SVTDG Co-Chair)
Dolby Laboratories, Inc.	Grace L. Chu; Vice President of Tax and Treasurer (SVTDG Co-Chair)
Open AI	Stephen A. Bonovich; Vice President, Tax (SVTDG Co-Chair)
10x Genomics, Inc.	Anita VanHall; Senior Director, Tax and Treasury
Adobe Inc.	Vinh Hoang; Vice President, Global Tax
Advanced Micro Devices, Inc.	Jerome N. Meyer; Vice President, Global Tax
Agilent Technologies	Rajvi Shah; Vice President, Tax
Airbnb, Inc.	Mirei Yasumatsu; Vice President, Global Tax
Align Technology, Inc.	Joy Loh; Vice President, Tax and Treasury
Alphabet	Damon A. Richardson; Vice President, Global Tax
Amazon.com, Inc.	Kurt Lamp; Vice President Global Tax
Ancestry.com	Edward R. Gwynn; Vice President of Tax
Anthropic PBC	Jason Choi; Head of Tax
Anysphere, Inc.	Brian O’Cuiv; Head of Tax and Treasury
Apple Inc.	Phillip Bullock; Head of Tax
Applied Materials, Inc.	Ryan Pierson; Vice President Global Tax
Aptiv PLC	Timothy C. Seitz; Senior Vice President, Finance & Government Affairs
Arista Networks	Hayden Marshall; Director, Tax
Atlassian	Morgan Randolph; Global Head of Tax
Autodesk, Inc.	Stashu J. Stemkowski; Vice President, Tax and Financial Services
Axon Enterprises, Inc.	Bill Ling; Vice President, Tax;
Benchmark Electronics, Inc.	Matt Beckler; Vice President, Tax
Blackhawk Network, Inc.	Christian A. Howald; Vice President, Global Tax
BMC Software, Inc.	Matt Howell; Vice President, Global Tax
Broadcom Inc.	Ivy Pong; Vice President, Global Taxation
Cadence Design Systems, Inc.	Dean Ozawa; Vice President, Corporate Tax
Chegg, Inc.	Stephanie Lam; Senior Director Tax
Cirrus Logic, Inc.	Sarah Wallis; Vice President, Tax
Cloud Software Group	Brian Shytte; Vice President, Corporate Treasurer
CoreWeave	Marc Lewis; Vice President of Tax

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Organization	Representative
CrowdStrike	Tal Kaissar; Vice President and Director of Tax
Databricks, Inc.	Joe Giovanelli; Senior Director, Tax
Dell Technologies	Thomas J. Vallone; Senior Vice President, Global Tax
Docusign	Miriam Paul Thacker; Vice President, Head of Global Tax
DoorDash, Inc.	Glen A. Kohl; Vice President, Tax
Dropbox, Inc.	Lisa Youel; Global Head of Tax
Dynatrace	Paul J. Scarcello Jr.; Vice President of Tax
eBay Inc.	Heather J. Jurek; Vice President, Tax
Elastic N.V.	Heather Norko; Vice President, Tax and Treasury
Electronic Arts Inc	Jim Crane; Vice President, Head of Tax
Expedia Group	Gordon Beckstead; <i>Senior Vice President</i>
F5, Inc.	Pankti Patel; Vice President, Tax
Flex Ltd.	Jason Spicer; Vice President, Tax
GE Vernova	Sharon Heck; Vice President, Treasurer and Chief Tax Counsel
Genesys Cloud Services	Kathryn Thompson; Chief Tax Officer
Gigamon Inc.	Rhonda Klein; Senior Director of Tax
Gilead Sciences, Inc.	Chan K. Chea; Vice President, Global Head of Tax
GitLab Inc.	James J. Gladen; Vice President Tax
GlobalLogic	James K. Lucas; Vice President, Tax
Hewlett Packard Enterprise	Jeremy K. Cox; Senior Vice President, Tax
HP Inc.	Brian Lynn; Global Head of Tax
IBM Corporation	Kanthimathi Morrissey; Chief Tax Officer
Indeed	Brian Farrell; Head of Tax
Ingram Micro Inc.	David Edquist; Senior Vice President, Tax
Instacart	Ben Wylie; Senior Director, Tax;
Intuit Inc.	Sandra Hahn; Global Head of Tax
Intuitive Surgical	Jonathan C Grahmann; Vice President - Tax
Jazz Pharmaceuticals	Diana Chan; Executive Director - Tax
Keysight Technologies, Inc.	Michael Kelchen; Vice President, Global Tax
KLA Corporation	Jim Cordoba; Vice President, Tax
Lam Research Corporation	K. Alia Ayub; Vice President, Tax
Lattice Semiconductor Corporation	Darius Portela; Senior Director, Tax & Treasury
Liftoff Mobile, Inc.	Benita Wold; Vice President, Tax
LiveRamp, Inc.	Markus Dinkel; Vice President, Corporate Tax
Logitech Inc.	Gretchen Horwitz; Global Head of Tax
Lucid Motors	Angela Sun; Global Head of Tax
Marvell Technology, Inc.	Gregg S. Morrison; Senior Vice President, Treasurer & Head of Global Tax
Match Group	Rebecca Shaffer; Senior Vice President of Tax
Meta Platforms, Inc.	Frances Erskine; Vice President, Tax

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Organization

Representative

Micron Technology, Inc.	Alex Biegert; Corporate Vice President, Tax
Microsoft Corporation	Daniel Goff; Corporate Vice President Worldwide Tax & Trade
Monolithic Power Systems, Inc.	Dale Green; Director of Corporate Taxes
Netflix, Inc.	Josh Mishoe; Head of Global Tax
Netskope	Erin Stuart-Cayot; Vice President Global Tax
Nutanix Inc.	Priya Roche; Vice President, Global Tax
NVIDIA Corporation	Mark Hoose; Vice President Global Tax
Okta	William DeFazio; Senior Vice President Tax and Treasury
onsemi	Shannon Janis; Vice President Global Tax
Oracle Corporation	Greg Hilbrich; Executive Vice President and Treasurer
Ouster Inc.	Alecia Wu; Senior Director of Global Tax
Palo Alto Networks Inc	Lilack Ben Zeev; Vice President Head of Global Tax
PayPal Holdings Inc.	Ameeta Patel; Senior Vice President, Chief Tax Officer
Penguin Solutions	Hans Tanzler; Vice President, Tax
Pinterest	John Buchta; Vice President, Tax
Pure Storage, Inc.	Lance Heinig; Vice President, Tax & Trade
Qualcomm, Inc.	Roberta L. Swanson; Vice President, Global Head of Tax
QuantumScape Corporation	Crystal Chen; Tax Director
Robinhood	Annie Herlitz; Vice President of Finance & Tax
Roku, Inc.	Shellie K. Sakamoto; Head of Tax
salesforce.com	Darryl Yee; Executive Vice President of Tax
Samsara, Inc.	Temikia Montford; Vice President, Tax
Sandisk Corporation	Jon Alleman; Vice President Tax
Seagate Technology	Henry Garrido III; Senior Director, Global Tax
Semtech Corporation	Venkata J. Dhunaka; Senior Director, Tax
SentinelOne	Jennifer A. Raney; Vice President, Tax & Treasury
ServiceNow	Elisabeth Loew; Vice President Tax
Snap Inc.	Jonathon Locascio; <i>Vice President of Tax</i>
Snowflake Inc.	Michael Bumbaca; Vice President, Tax
SoFi Technologies, Inc.	Chase Bradshaw; Senior Director, Global Head of Tax
Sophos	Donald Blach; Vice President, Tax
Stripe, Inc.	Humberto Reboredo; Head of Tax & Tax Policy
Structure Therapeutics, Inc.	Ryan Oh; Executive Director, Global Tax and Treasury
Supermicro Computer, Inc.	Vicki Huang; Global Head of Tax
SurveyMonkey	Kent Nguyen; Senior Tax Director
Synopsys, Inc.	Jill Harding; Vice President Tax, Treasury & Corporate Planning
Teradyne, Inc.	Drew Adams; Head of Tax
Tesla, Inc.	Joe Gruber; Vice President, Tax
The Cooper Companies	Agostino Ricupati; Senior Vice President Tax

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Organization**Representative**

The Walt Disney Company	John A. Stowell; Senior Vice President - Tax, Incentives & International Financial Reporting
Trimble Inc.	Jiao Zhang; Vice President, Global Tax
Twilio Inc.	John Schreiber; Vice President, Global Tax
Uber Technologies	Kirsten Nordlof; Vice President, Tax
UiPath	Ionut Sas; Vice President, Tax & Treasury
Unity Software Inc.	Amy Dodge; Senior Director, Global Tax
Upstart Holdings, Inc.	Jenna Wei; Tax Director
Upwork, Inc.	Trevor Russ; Senior Director, Tax
Visa Inc.	Wayne G. Monfries; Senior Vice President, Global Tax
Western Digital	Robert Stockton; Vice President, Global Tax
Workday Inc.	Teresa Chen; Vice President, Tax
Yahoo, Inc.	Darin Orr; Vice President, Tax
Yelp Inc.	Ed Jajeh; Vice President, Tax, Treasury and Workplace
Zillow Group	Diana Backhouse; Head of Tax
Zoom Communications, Inc.	John Lee; Head of Tax
Zscaler, Inc	Jay Lall; Vice President, Tax

Worldwide Totals for Companies Represented by Group Members

REVENUE

\$3.1 Trillion

RESEARCH & DEVELOPMENT

\$377.4 Billion

EMPLOYEES

4.9 Million

SVTDG MEMBERS

123

Statement of Purpose

The purpose of the Silicon Valley Tax Directors Group is to promote sound, long-term tax policies that support innovation and the global competitiveness of the U.S. technology industry. Members of this group believe that tax policies should enhance opportunities for growth by encouraging and rewarding enterprises that develop goods and services that meet international market standards.

The companies represented by the Group depend on research and development in order to remain on the cutting edge of technology innovation and to compete in the international marketplace. Due to their large expenditures on research and development, it is necessary to maintain worldwide sales levels. (Approximately half of all U.S. technology revenue comes from international sales.)

The Group believes that long-term tax policies should enhance and support innovation and competitiveness by:

- 1 Stimulating increased research and development.
- 2 Making it easier for U.S. corporations to compete internationally.
- 3 Encouraging investment in capital assets.
- 4 Bolstering efforts to develop and reward a skilled U.S. workforce.

Our purpose is to strive for the implementation of long-term tax policies that will allow the U.S. high technology industry to continue to be innovative and competitive in the global marketplace.

Visit the Silicon Valley Tax Directors Group Website at
www.svtdg.org



Co-Chair,
Silicon
Valley Tax
Directors
Group

Robert F. Johnson

Senior Vice President, Global Tax and Customs; Cisco Systems, Inc.

Contact

johnsonr@cisco.com
408.527.9087 PHONE

Education

B.S. Accounting, Pennsylvania State University

Professional Organizations

Board - Alliance for Competitive Taxation (ACT); Tax Committee - Business Round Table (BRT); Tax Committee - National Foreign Trade Council (NFTC); Tax Committee - United States Council for International Business (USCIB); Tax Committee - Business at OECD (BIAC); Tax Committee - Information Technology Industry Council (ITI); Tax Committee - Coalition for American Innovation (CAI)

Background

Public accounting and corporate tax management. Current responsibilities include management of Cisco's global tax and customs obligations and leading and Cisco's global tax and customs team.

Company Profile

Cisco Systems, Inc.

170 West Tasman Drive
San Jose, California 95134

Cisco designs and sells a broad range of technologies that power the Internet. Cisco's platforms are integrated across networking, security, collaboration, applications and the cloud.



Co-Chair,
Silicon
Valley Tax
Directors
Group

Grace L. Chu

Vice President of Tax and Treasurer; Dolby Laboratories, Inc.

Contact

grace.chu@dolby.com
415.558.0200 PHONE

Education

B.S.C. Santa Clara University; C.P.A. in California and Hawaii

Professional Organizations

Board Member Silicon Valley Chapter of Tax Executive Institute; California Society of Certified Public Accountants; Hawaii Society of Certified Public Accountants

Background

Public accounting. Current responsibilities include worldwide corporate tax, treasury and risk management.

Company Profile

Dolby Laboratories, Inc.

1275 Market Street
San Francisco, California 94103

Dolby Laboratories, Inc. creates audio and imaging technologies that transform entertainment and communications at the cinema, at home, at work, and on mobile devices.



Co-Chair,
Silicon
Valley Tax
Directors
Group

Stephen A. Bonovich

Vice President, Tax; Open AI

Education

B.A. Hamilton College; J.D. Hastings College of the Law, University of California; LL.M. New York University

Professional Organizations

California State Bar, American Bar Association, Tahirih Justice

Background

Started in big SF law firms, Sun Microsystems, Intel Corporation, Agilent Technologies.

Company Profile

Open AI

3180 18th Street Suite 100
San Francisco, CA 94110

Open AI seeks to ensure that artificial general intelligence benefits all of humanity.



Anita VanHall

*Vice President, Tax and Treasury;
10x Genomics, Inc.*

Education

M.B.A Michigan State University;
Professional Program Accounting

Professional Organizations

Santa Clara County Chapter TEI

Background

EY (Tax) in Cleveland, Woodland Hills and San Jose offices. Tax and treasury leader for biotech and technology companies.

Company Profile

10x Genomics, Inc.

6230 Stoneridge Mall Road
Pleasanton, California 94566

10x Genomics builds products to interrogate, understand and master biology. Our products have been adopted by researchers around the world, including the top 100 global research institutions and the top 20 global pharmaceutical companies, and have been cited in over 1,500 research papers on discoveries across the life sciences, including oncology, immunology, and neuroscience.



Vinh Hoang

*Vice President, Global Tax;
Adobe Inc.*

Education

B.S., Business, California Polytechnic State University; C.P.A California

Professional Organizations

Santa Clara Valley Chapter of Tax Executives Institute and American Institute of Certified Public Accountants

Background

Public accounting and corporate tax management. Current responsibilities include global tax management and planning.

Company Profile

Adobe Inc.

345 Park Avenue, MS E07
San Jose, California 95110-2704

Adobe is a diversified software company and a global leader in digital media and digital marketing solutions. Adobe's creative, marketing, and document offerings enable everyone to design and deliver exceptional digital experiences worldwide .



Jerome N. Meyer

*Vice President, Global Tax;
Advanced Micro Devices, Inc.*

Company Profile

Advanced Micro Devices, Inc.

2485 Augustine Drive
Santa Clara, California 95054

For nearly 50 years, AMD has driven innovation in high-performance computing, graphics and visualization technologies — the building blocks for gaming, immersive platforms and the datacenter. Hundreds of millions of consumers, leading Fortune 500 businesses and cutting-edge scientific research facilities around the world rely on AMD technology daily to improve how they live, work and play. AMD employees around the world are focused on building great products that push the boundaries of what is possible. (NASDAQ: AMD).



Mirei Yasumatsu

*Vice President, Global Tax;
Airbnb, Inc.*

Contact

mirei.yasumatsu@airbnb.com

Education

B.S.B.A., J.D., M.B.A. Washington
University in St. Louis; LL.M. (Taxation)
New York University School of Law

Professional Organizations

California State Bar; California Society
of Certified Public Accountants; Santa
Clara Valley Chapter of Tax Executive
Institute

Background

Public accounting and corporate tax
management. Currently responsible for
worldwide corporate tax management.

Company Profile

Airbnb, Inc.

888 Brannan Street
San Francisco, California 94103

Airbnb was born in 2007 when two
Hosts welcomed three guests to their
San Francisco home, and has since
grown to over 4 million Hosts who have
welcomed more than 1 billion guest
arrivals in almost every country across
the globe. Every day, Hosts offer unique
stays and experiences that make it
possible for guests to connect with
communities in a more authentic way.



Rajvi Shah

*Vice President, Tax;
Agilent Technologies*

Education

M.B.T., University of Southern California
(USC)

Professional Organizations

AICPA, TEI (Silicon Valley Chapter)

Background

Over 20 years of experience in tax
operations, strategy, and planning (Big
4 + Industry). Current responsibilities
include Global Direct & Transaction
Taxes

Company Profile

Agilent Technologies

5301 Stevens Creek Blvd
Santa Clara, California 95051

Agilent Technologies Inc. is a global
leader in life sciences, diagnostics and
applied chemical markets, providing
application focused solutions that
include instruments, software, services
and consumables for the entire
laboratory workflow.



Joy Loh

*Vice President, Tax and Treasury;
Align Technology, Inc.*

Education

B.S. Business Administration,
Accounting and Marketing, University
of California at Berkeley

Professional Organizations

Santa Clara Valley Chapter of Tax
Executives Institute; California Society
of Certified Public Accountants

Background

Current responsibilities include
worldwide corporate tax, treasury and
risk management. Former roles in
public accounting, and corporate tax
in industry.

Company Profile

Align Technology, Inc.

2820 Orchard Parkway
San Jose, California 95134

Align Technology is a leading global
medical device company that is
changing lives through better smiles
with the Invisalign® system, the most
advanced clear aligner system in the
world, and iTero® intraoral scanners
and services. Align has revolutionized
the dental and orthodontic industry
by combining artificial intelligence
and machine learning, digital imaging
and visualization, biomechanics and
material science to develop the most
advanced clear aligner system in
the world.



Damon A. Richardson

*Vice President, Global Tax;
Alphabet*

Education

B.S. University of California, Riverside;
J.D. University of California, Los Angeles

Professional Organizations

Board Member; University of California,
Riverside Board of Trustees

Background

Public Accounting Experience: PwC
- International Tax; Private Industry
Experience: Agilent Technologies -
International Tax; Google/Alphabet:
Current Role: Vice President, Global
Tax; Previous Roles: Vice President,
International Tax; Director, International
Tax Counsel; International Tax Counsel.

Company Profile

Alphabet

1600 Amphitheatre Parkway
Mountain View, California 94043

Alphabet Inc (Alphabet), the holding
company of Google, is a global
technology company. It offers a wide
range of products and platforms
including Search, Google Maps,
calendar, ads, Gmail, Google Play,
Android, Google Cloud, Chrome, and
YouTube. It also offers hardware
products such as Pixel phones,
smartwatches, and Google Nest
home products. The company offers
online advertising services through
its Google Network services.



Kurt Lamp

*Vice President, Global Tax;
Amazon.com, Inc.*

Contact

206.266.1000 OFFICE

Education

BA in Economics, University of North
Dakota; J.D. University of North Dakota;
LL.M in Taxation New York University

Professional Organizations

Tax Foundation, Tax Executives Institute,
Council on State Taxation, Washington
Bar

Background

Currently responsible for global tax
matters at Amazon. Previously with
Arthur Andersen 1994–1997 and
Microsoft 1997–2010.

Company Profile

Amazon.com, Inc.

234 Ninth Avenue, Second Floor
Seattle, Washington 98109

We seek to be Earth's most customer-
centric company We are guided by four
principles: customer obsession rather
than competitor focus, passion for
invention, commitment to operational
excellence, and long-term thinking. Our
business now encompasses a large
variety of product types and services
offerings. This includes the products we
sell to consumers through our online
and physical stores, services we offer to
third-party sellers to sell and fulfill their
products, subscriptions like Amazon
Prime, on-demand technology services
through AWS, and advertising services.



Edward R. Gwynn

*Vice President of Tax;
Ancestry.com*

Contact

egwynn@ancestry.com

Education

B.B.A., University of Texas (Arlington);
M.S.T., University of Texas (Arlington)

Professional Organizations

Texas CPA, American Institute of
Certified Public Accountants

Background

Previously spent 17 years at Arthur
Andersen and Ernst & Young and 6
years as VP of Tax at MDC Holdings,
Inc. Currently managing Ancestry's
worldwide corporate tax function.

Company Profile

Ancestry.com

1300 W Traverse Parkway
Lehi, Utah 84043

Ancestry, the global leader in family
history and consumer genomics,
harnesses the information found in
family trees, historical records, and
DNA to help people gain a new level of
understanding about their lives.



Jason Choi

*Head of Tax;
Anthropic PBC*

Education

BA, Stanford; JD, Columbia Law School
Professional Organizations
California bar

Background

ServiceTitan, Netflix, Intel, Latham &
Watkins

Company Profile

Anthropic PBC

548 Market Steet
San Francisco, California 94104

Anthropic is an AI safety and research
company that's working to build reliable,
interpretable, and steerable AI systems.



Brian O'Cuiv

*Head of Tax and Treasury
Anysphere, Inc.*

Contact

bocuiv@anysphere.co
408.876.0017
cursor.com

Education

Bachelor of Laws, University College
Dublin; Postgraduate Diploma in
Accounting, Dublin City University

Professional Organizations

Irish Chartered Accountants, Irish
Taxation Institute; CPA (California)

Background

Formerly VP Tax and Treasury at Faire
Wholesale. Prior to Faire, spent 20
years with PwC in Ireland and the bay
area.

Company Profile

Anysphere, Inc.

2261 Market Street, STE 86466
San Francisco, California, 94114

Anysphere, Inc. (dba Cursor) is an
AI software company building Cursor,
an AI-powered coding environment
that helps developers write, edit, and
understand code faster and more
effectively.



Phillip Bullock

*Head of Tax;
Apple Inc.*

Contact

408.996.1010 OFFICE

Education

B.S.B.A. Accounting, Information
Systems, Virginia Tech; M.P.A., Taxation,
The University of Texas at Austin

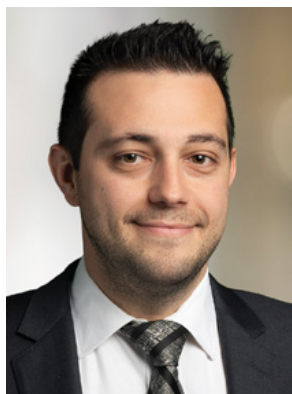
Background

Currently responsible for worldwide
corporate tax matters at Apple. Former
roles in public accounting, corporate tax
and financial management.

Company Profile

Apple Inc.

One Apple Park Way
Cupertino, California 95014



Ryan Pierson

*Vice President, Global Tax;
Applied Materials, Inc*

Education

B.A. Accounting & Information Systems, Michigan State University; M.S. in Accounting (specialization in tax), Michigan State University

Background

International Tax Services at Grant Thornton and Ernst & Young; former head of tax at Dana Incorporated; current head of tax at Applied Materials

Company Profile

Applied Materials

3225 Oakmead Village Drive, M/S 1281
Santa Clara, California 95052



Timothy C. Seitz

*Senior Vice President, Finance &
Government Affairs; Aptiv PLC*

Education

B.B.A., Eastern Michigan University; J.D., University of Colorado Law School

Professional Organizations

Colorado Bar, Colorado and American Bar Associations. Colorado CPA (Expired 2019).

Background

Past experience includes: Principal, KPMG, Value Chain Management. Senior Vice President, Tax, Trade, Financial Supply Chain Design; Flextronics International, Ltd. Advisory Panel Eclipse Ventures; Partner, Deloitte & Touche, LLP, various offices.

Company Profile

Aptiv PLC

5 Hanover Quay, Grand Canal Dock
Dublin 2 Ireland

Aptiv is a European multi-national headed by Aptiv AG, a publicly traded Swiss resident entity. Collectively, the Aptiv Group is one of the largest industrial technology suppliers in the global automotive and mobility industry. Its mission is to be a leader provider of technology solutions that integrate hardware, software, data and analytics into solution sets that together make mobility safer (reducing injury and property damage), greener (facilitating transition to cleaner and more sustainable energy sources), and more connected (harnessing the power of data to improve efficiency, access, and congestion).



Hayden Marshall

*Director, Tax;
Arista Networks*

Contact

hayden@arista.com
408.547.5720 PHONE

Education

B.A., The University of Melbourne, Australia; B.Comm., Deakin University, Australia; C.A. (Chartered Accountant), Australia

Professional Organizations

Silicon Valley Chapter of the Tax Executive Institute; Chartered Accountants Australia and New Zealand

Background

Hayden started his career in 2004 as a Chartered Accountant at PwC in Melbourne, Australia, before moving into Industry. He joined the Symantec tax team in 2009 following an acquisition and then joined the Arista tax team in 2018. Current role at Arista Networks is the head of global tax, leading all direct and indirect corporate tax matters.

Company Profile

Arista Networks

5453 Great America Parkway
Santa Clara, California 95054

Arista Networks is an industry leader in software driven cognitive cloud networking solutions for large-scale data center and campus workspace environments. Arista's award-winning platforms deliver availability, agility, automation analytics, and security through an advanced network operating system.



Morgan Randolph

*Global Head of Tax;
Atlassian*

Education

BBA from Texas Tech University; MST
from the University of Texas at Arlington
- College of Business

Professional Organizations

Tax Executives Association - Austin;
Texas State Board of Public
Accountants - CPA

Background

Public accounting and private industry,
primarily in technology. Currently
responsible for worldwide
tax management.

Company Profile

Atlassian

350 Bush Street, 13th Floor
San Francisco, California 94104

Atlassian's mission is to unleash the
potential of every team. We make
collaboration software tools including
Jira, Confluence and Trello.



Stashu J. Stemkowski

*Vice President, Global Tax,
Payroll and Stock;
Autodesk, Inc.*

Education

B.A. Economics, Rhodes College;
M.S. Accounting, Rhodes College

Professional Organizations

American Institute of Certified
Public Accountants

Background

Public accounting and corporate tax
management. Current responsibilities
include global corporate tax, payroll and
stock administration management.

Company Profile

Autodesk, Inc.

One Market, Suite 400
San Francisco, California 94105

Autodesk is changing how the
world is designed and made.
Our technology spans architecture,
engineering, construction, product
design, manufacturing, media, and
entertainment, empowering innovators
everywhere to solve challenges big
and small. From greener buildings
to smarter products to mesmerizing
blockbusters, Autodesk software
empowers innovators to design and
make a better world for all.



Bill Ling

*Vice President, Tax;
Axon Enterprises, Inc.*

Contact

bling@axon.com
415.592.4221 PHONE
axon.com

Education

BSBA, American University; MST,
Baruch College

Professional Organizations

AICPA, CalCPA

Background

I'm a seasoned in-house tax
professional with a broad background
in corporate and international taxation,
including tax planning, tax policy,
M&A, restructurings, transfer pricing,
tax controversy, tax accounting, and
compliance. I've led tax strategy across
complex areas like new business
launches, payments, and insurance
products, while managing end-to-end
tax operations—from provision to audit
defense.

Company Profile

Axon Enterprises, Inc.

San Francisco, California 94129

Axon Enterprise, Inc. is an American
company that develops weapons
and technology products for military,
law enforcement, and civilians. The
company has since diversified into
technology products for military and
law enforcement, including body-worn
cameras, dashcams, computer-aided
dispatch software, and Evidence.com, a
cloud-based digital evidence platform.



Matt Beckler

*Vice President, Tax;
Benchmark Electronics, Inc.*

Education

B.A. in Accounting, Grand Canyon University;
MBA, Arizona State University

Professional Organizations

America Institute of Certified Public Accountants; Arizona Society of CPAs; Association of Financial Professionals (CTP certification); Tax Executives Institute

Background

Public accounting and private industry. Current responsibilities include global corporate tax.

Company Profile

Benchmark Electronics, Inc.

56 South Rockford Drive
Tempe, Arizona 85288

Benchmark provides comprehensive solutions across the entire product life cycle by leading through its innovative technology and engineering design services, leveraging its optimized global supply chain and delivering world-class manufacturing services in the following industries: commercial aerospace and defense, medical, industrial, semiconductor capital equipment and advanced computing and communication. Benchmark's global operations include facilities in seven countries and its common shares trade on the New York Stock Exchange under the symbol BHE.



Christian A. Howald

*Vice President, Global Tax;
Blackhawk Network, Inc.*

Contact

christian.howald@bhnetwork.com

Education

JD, University of Houston Law Center; MBA, University of Houston; BBA, Accounting, Harding University

Professional Organizations

State Bar of Texas - Tax Section

Background

Christian previously spent over 18 years in public accounting providing tax technical and income tax accounting services involving multiple disciplines and jurisdictions, including providing pre-acquisition tax services to both private equity and strategic buyers. He received his B.B.A. in Accounting from Harding University and both his J.D. and M.B.A. from the University of Houston. Christian is a licensed member of the State Bar of Texas and a Certified Public Accountant in California and Texas.

Company Profile

Blackhawk Network, Inc.

6220 Stoneridge Mall Road
Pleasanton, California 94588

Blackhawk Network is a leading prepaid payment network utilizing proprietary technology to offer a broad range of prepaid gift, telecom, and debit cards, in physical and electronic forms, as well as related prepaid products and payment services.



Matt Howell

*Vice President, Global Tax;
BMC Software, Inc.*

Education

M.P.A. Taxation, B.A., University of Texas at Austin

Professional Organizations

American Institute of Certified Public Accountants; Texas Society of CPAs; Manufacturers Alliance (MAPI)

Background

Public accounting and corporate tax management. Currently responsible for worldwide corporate tax management.

Company Profile

BMC Software, Inc.

2103 CityWest Boulevard
Houston, Texas 77042

BMC delivers software solutions that help IT transform digital enterprises for the ultimate competitive business advantage. We have worked with thousands of leading companies to create and deliver powerful IT management services. From mainframe to cloud to mobile, we pair high-speed digital innovation with robust IT industrialization—allowing our customers to provide amazing user experiences with optimized IT performance, cost, compliance, and productivity. We believe that technology is the heart of every business, and that IT drives business to the digital age.



Ivy Pong

*Vice President, Global Taxation;
Broadcom Inc.*

Education

MS Taxation; MS Accounting; BA;
CPA California

Professional Organizations

Tax Executives Institute

Background

Public accounting and tax management in hi-tech industry. Currently oversee worldwide corporate tax planning, reporting, compliance, audit and controversy.

Company Profile

Broadcom Inc.

3421 Hillview Avenue
Palo Alto, California 94304

Broadcom Inc. is a global technology leader that designs, develops and supplies a broad range of semiconductor and infrastructure software products. Broadcom's category-leading product portfolio serves critical markets including data center, networking, software, broadband, wireless, storage and industrial.



Dean Ozawa

*Vice President, Corporate Tax;
Cadence Design Systems, Inc.*

Education

B.A. University of California, Davis;
C.P.A.

Professional Organizations

Tax Executives Institute

Background

Seven years of public accounting with Arthur Andersen LLP. Joined Cadence Design Systems, Inc. in March, 1994. Promoted to Vice President in November 2001. Responsible for managing corporate tax function.

Company Profile

Cadence Design Systems, Inc.

2655 Seely Avenue, Building 5
San Jose, California 95134

Cadence develops computational, AI-driven software, accelerated hardware, and silicon intellectual property (IP) products and solutions. Its technologies enable semiconductor and systems companies to design, verify, and bring to life innovative electronic and electromechanical products. Cadence's solutions are used across applications including semiconductor design, advanced packaging, printed circuit boards, system analysis, artificial intelligence, data centers, automotive, aerospace and defense, industrial systems, and life sciences. The company maintains sales offices, design centers, and research facilities around the world and is headquartered in San Jose, California.



Stephanie Lam

*Senior Director Tax;
Chegg, Inc.*

Contact

slam@chegg.com

Education

B.A. Accounting, San Jose State
University

Company Profile

Chegg, Inc.

3990 Freedom Circle
Santa Clara, California 95054

Chegg, Inc., through its web site Chegg.com, is a student hub allowing students to connect to the people and tools needed to succeed throughout their high school and college career. The company offers an array of scholastic materials including textbook rentals, homework help, scholarship connections, course organization and scheduling enhancing education for millions of students by saving them time, saving them money, and helping them get smarter.



Sarah Wallis

*Vice President, Tax;
Cirrus Logic, Inc.*

Contact

www.cirrus.com

Education

BBA Texas A&M University; MS
Accounting (Tax) Texas A&M University;
C.P.A. Texas

Professional Organizations

Tax Executives Institute, Central Texas
Chapter President

Background

Public accounting and corporate tax management. Current responsibilities include global tax controversy, financial reporting, transfer pricing, tax planning, and tax compliance.

Company Profile

Cirrus Logic, Inc.
800 West 6th Street
Austin, Texas 78701

Founded in 1984 in Silicon Valley, Cirrus Logic is a leader in low-power, high-precision, mixed-signal processing solutions. Leveraging a broad portfolio of hardware, software and proprietary algorithms, Cirrus Logic excels at developing IP-rich solutions that create innovative user experiences for the world's top mobile and consumer applications.



Brian Shytle

*Vice President, Corporate Treasurer;
Cloud Software Group
(formerly Citrix)*

Contact

brian.shytle@cloud.com
954.267.2505 PHONE

Education

B.A. Acctg University of Florida;
M.S.T University of Florida

Background

Joined Citrix from EY in 2003 to build global tax department. Manage all aspects of global Tax in publicly traded multinational company. As career progressed, expanded role to include treasury, source to pay and real estate/facilities.

Company Profile

Citrix
851 W. Cypress Creek Road
Ft. Lauderdale, Florida 33309

Citrix is a digital workspace platform that gives employees everything they need to be productive in one unified experience while arming IT with the visibility, simplicity, and security needed to enable and control it all. Since 1989, Citrix has made it easier for people to access the applications and content they need to do their very best work — wherever and whenever work needs to get done. Today, more than 100 million users across 400,000 organizations — including 98% of the Fortune 500 — trust Citrix to power a better way to work.



Marc Lewis

*Vice President of Tax;
CoreWeave*

Contact

mlewis@coreweave.com
646.734.3658 CELL

Education

New York University, BA; New York Law School, JD; Georgetown University Law Center, LL.M in Taxation

Background

PE/public company finance executive with 20+ years of experience building tax and treasury functions from the ground up in capex intensive industries. Expert at translating complex financial challenges into actionable insights for Boards. Deep expertise in tax, accounting, cross-border structuring, cash planning, debt issuance, tax audits, and financial planning. Trusted advisor and Adjunct Tax Law Professor/ Author.

Company Profile

CoreWeave
100 Mathilda Place, Suite 400
Sunnyvale, California, 94086

CoreWeave is a specialized, AI-native cloud infrastructure provider that delivers massive-scale GPU compute resources, purpose-built for training and inference of large-scale generative AI models. As a premier partner to many companies, it operates a high-performance network of data centers, focusing on speed, efficiency, and flexibility for AI startups and enterprises.



Tal Kaissar

*Vice President and Director of Tax;
CrowdStrike*

Contact

tal.kaissar@crowdstrike.com

Education

BS Accounting Rutgers University; CPA
New York

Professional Organizations

AICPA

Background

Senior Tax Manager at EY (1994-2005).
Co-head of Global Tax Acct at Citigroup
(2005-2007). VP and Global Head
of Tax at AIG (2007-2015). Senior
Tax Partner at KPMG (2015-2024).
Currently, head of tax at CrowdStrike

Company Profile

CrowdStrike

150 Mathilda Place
Sunnyvale, California 94086

CrowdStrike is a leader in cybersecurity.
The company secures the most critical
areas of risk - endpoints and cloud
workloads, identity, and data - to keep
customers ahead of today's adversaries
and stop breaches.



Joe Giovanelli

*Senior Director, Tax;
Databricks, Inc.*

Contact

joe.giovanelli@databricks.com

Education

BA University of Washington; MST
University of Washington

Professional Organizations

San Francisco Chapter Secretary - Tax
Executive Institute

Background

Previously worked at Big 4 (PwC)
accounting firm focused on global
corporate tax accounting and US tax. In
my current role at Databricks, Inc. I am
responsible for all global corporate tax
matters.

Company Profile

Databricks, Inc.

160 Spear Street, 15th Floor
San Francisco, California 94105

Databricks is the Data and AI company.
More than 15,000 organizations
worldwide — including Block, Comcast,
Condé Nast, Rivian, Shell and over
60% of the Fortune 500 — rely on
the Databricks Data Intelligence
Platform to take control of their data
and put it to work with AI. Databricks
is headquartered in San Francisco,
with offices around the globe, and was
founded by the original creators of
Lakehouse, Apache Spark™, Delta Lake
and MLflow.



Thomas J. Vallone

*Senior Vice President, Global Tax;
Dell Technologies*

Contact

tom.vallone@dell.com

Education

J.D., Harvard University; B.A.,
Rutgers University

Background

Current responsibilities include global
corporate tax.

Company Profile

Dell Technologies

401 Dell Way
Round Rock, Texas 78682



Miriam Paul Thacker

*Vice President, Head of Global Tax;
DocuSign*

Education

Juris Doctor, Howard University School of Law, Georgetown University Law Center; Bachelor of Commerce, University of Calgary; B.A., University of California at Los Angeles

Professional Organizations

Member, California Bar; Member, New York Bar; Member, International Fiscal Association; Member, Chief

Background

Corporate Tax Law at Sullivan & Cromwell and Loeb & Loeb; Formerly with The Coca-Cola Company and Google



Glen A. Kohl

*Vice President, Tax;
DoorDash, Inc.*

Education

B.S. Tufts University; J.D. Yale Law School; LL.M. New York University School of Law

Professional Organizations

California State Bar; American Bar Association; Manufacturers Alliance (MAPI)

Background

Corporate and tax law in law firms and an internet bubble company; U.S. Treasury Official. Responsibilities include Tax and Treasury function. Formerly with Electronic Arts, Amazon and Stripe.

Company Profile

DoorDash, Inc.
San Francisco, California



Lisa Youel

*Global Head of Tax;
Dropbox, Inc.*

Contact

lyouel@dropbox.com
206.579.1752 CELL

Education

B.A. State University of New York, C.B.A. Georgetown University, M.B.A. Pace University

Background

Big 4 and private industry. Current responsibilities include worldwide corporate tax management.

Company Profile

Dropbox, Inc.
1800 Owens Street, Suite 200
San Francisco, California 94158

Dropbox provides the platform and tools to help individuals and distributed teams securely create content and share it with collaborators—from anywhere.



Paul J. Scarcello Jr.

*Vice President of Tax;
Dynatrace*

Contact

paul.scarcello@dynatrace.com
313.227.3422 OFFICE

Education

B.A., Albion College; J.D.,
Tulane Law School

Professional Organizations

State Bar of Michigan

Background

Eight years of public accounting; 18 years in private industry, including nine years as head of tax. Extensive experience globally in international, Federal and state tax, tax accounting, strategic planning, mergers and acquisitions, project management, compliance and regulations, transfer pricing, systems management, data analysis, forecasting and process improvement. Additional proven aptitude in policies and procedures, budgeting, client/vendor relations, implementations, and tax research.

Company Profile

Dynatrace

2000 Brush Street
Detroit, Michigan 48226

Dynatrace is a publicly traded company offering the market-leading software intelligence platform, purpose-built for dynamic multicloud environments.



Heather J. Jurek

*Vice President, Tax;
eBay Inc.*

Contact

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408.335.4797 CELL

Education

B.COMM Australian National University;
LL.B Australian National University;
Chartered Accountant, Australia

Professional Organizations

Silicon Valley Chapter of the Tax Executive Institute; Chartered Accountants of Australia & New Zealand

Background

Almost 20 years with Deloitte in offices around the world, including Washington National Tax - International Tax and Tax Accounting. International tax operations and accounting roles at Bunge, AIG, and GE/Synchrony. Currently, Head of Tax for eBay Inc.

Company Profile

eBay Inc.

2065 Hamilton Ave
San Jose, California 95125

We connect people and build communities to create economic opportunity for all. At eBay, we create pathways to connect millions of sellers and buyers in more than 190 markets around the world. Our technology empowers our customers, providing everyone the opportunity to grow and thrive—no matter who they are or where they are in the world. And the ripple effect of our work creates waves of change for our customers, our company, our communities and our planet.



Heather Norko

*Vice President, Tax and Treasury;
Elastic N.V.*

Education

Education: B.S Sacred Heart University; MST, University of New Haven; CPA, State of Connecticut

Professional Organizations

Westchester County Tax Executive Institute; Connecticut Valley Chapter Tax Executive Institute

Background

Heather Norko is currently VP of Tax and Treasury at Elastic N.V., a search technology company based in Mountain View, California. Bringing more than 25 years of diverse tax and finance experience, she leads a distributive and remote tax and treasury function in all facets of corporate income tax (tax planning, provision, M&A due diligence and integration, audits) and corporate treasury (forecasting, liquidity management and investing).

Company Profile

Elastic N.V.

800 West El Camino Real, Suite 350
Mountain View, California 94040

Elastic N.V. is a search company which delivers technology solutions designed to run in public or private clouds in multi-cloud environments. It primarily offers Elastic Stack, a set of software products that ingest and store data from various sources and formats, as well as perform search, analysis, and visualization.



Jim Crane

*Vice President, Head of Tax;
Electronic Arts Inc*

Education

B.S.B.A. Washington University in Saint Louis; C.P.A. (inactive) Missouri

Professional Organizations

Silicon Valley Chapter of Tax Executives Institute

Background

Private industry. Currently responsible for global corporate tax.

Company Profile

Electronic Arts Inc

209 Redwood Shores Parkway
Redwood City, California 94065

Electronic Arts is a global leader in digital interactive entertainment. We develop, market, publish and deliver games, content and services that can be experienced on game consoles, PCs, mobile phones and tablets. At our core is a portfolio of intellectual property from which we create innovative games and experiences that deliver high-quality entertainment and drive engagement across our network of hundreds of millions of unique active accounts.



Gordon Beckstead

*Senior Vice President;
Expedia Group*

Contact

gbeckstead@expediagroup.com

Education

B.A. Brigham Young University; MAac Brigham Young University; J.D. Brigham Young University

Professional Organizations

Certified Public Accountant; American Bar Association; AICPA; California CPA; Tax Executive Institute; IFA

Background

Public accounting and private industry. Current responsibilities include global corporate tax.

Company Profile

Expedia Group

1111 Expedia Group Way W
Seattle, Washington 98199

Expedia Group leverages platform and technology capabilities across an extensive portfolio of businesses and brands to orchestrate the movement of people and the delivery of travel experiences on both a local and global basis.



Pankti Patel

*Vice President, Tax;
F5, Inc.*

Contact

www.f5.com

Education

M.S. in Accounting and Information Management, University of Texas at Dallas; CPA Washington

Professional Organizations

Seattle Chapter of Tax Executives Institute

Background

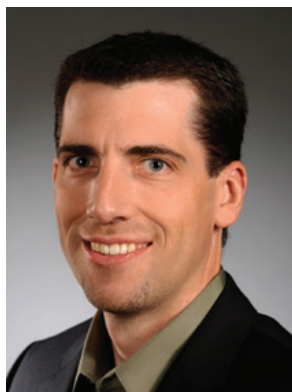
Currently responsible for global tax at F5. Former roles in public accounting at KPMG.

Company Profile

F5, Inc.

801 5th Avenue
Seattle, Washington, 98104

F5 is a multicloud application delivery and security provider committed to bringing a better digital world to life. F5 partners with the world's largest, most advanced organizations to optimize and secure every application and Application Programming Interface anywhere. F5 enables businesses to continuously stay ahead of threats while delivering exceptional, secure digital experiences for their customers.



Jason Spicer

*Vice President, Tax;
Flex Ltd.*

Contact

408.576.5144 OFFICE
720.299.1048 CELL

Education

B.B.A.. Accounting - University of Iowa;
Masters of Tax - University of Denver

Professional Organizations

American Institute of Certified Public
Accountants, Tax Executives Institute

Background

Public accounting and corporate tax.
Currently responsible for global
tax function.

Company Profile Flex Ltd.

6201 America Center Drive
San Jose, California 95002

Flex is the manufacturing partner of choice that helps a diverse customer base design and build products that improve the world. Through the collective strength of a global workforce across 30 countries and responsible, sustainable operations, Flex delivers technology innovation, supply chain, and manufacturing solutions to diverse industries and end markets.



Sharon Heck

*Vice President, Treasurer
and Chief Tax Counsel;
GE Vernova*

Education

Sharon holds a Juris Doctor degree from Creighton University, a Master's degree in taxation from Georgia State University and a Bachelor's degree in accounting from Troy University.

Background

Sharon Heck serves as Vice President, Treasurer, and Chief Tax Counsel for GE Vernova. Sharon leads a global team of more than 700 global professionals across the tax, treasury, and stat functions of the company.

Company Profile GE Vernova

58 Charles Street
Cambridge, Massachusetts 02141

GE Vernova is a planned, purpose-built global energy company that includes Power, Wind, and Electrification businesses and is supported by its accelerator businesses of Advanced Research, Consulting Services, and Financial Services. Building on over 130 years of experience tackling the world's challenges, GE Vernova is uniquely positioned to help lead the energy transition by continuing to electrify the world while simultaneously working to decarbonize it. GE Vernova helps customers power economies and deliver electricity that is vital to health, safety, security, and improved quality of life.



Kathryn Thompson

*Chief Tax Officer;
Genesys Cloud Services*

Contact

kathryn.thmpson@genesys.com
480.329.4171 PHONE

Education

Bachelor's in Accounting, Arizona State University; Master's in Taxation, Arizona State University; C.P.A. Arizona

Professional Organizations

Kansas City Chapter of TEI, AICPA

Background

Public Accounting - KPMG, Private Industry - Microchip Technology and Genesys Cloud Services. Current responsibilities include global corporate tax - both direct and indirect, including telecommunications.

Company Profile Genesys Cloud Services

1302 El Camino Real, Suite 300
Menlo Park, California 94025

Genesys Cloud, the Company's AI-Powered Experience Orchestration strategic platform, combines a powerful agentic AI framework with an open event data platform to orchestrate superior experiences at enterprise scale on a unified, cloud-native infrastructure. Genesys Cloud combines agentic, generative, predictive and conversational AI within a single framework, enabling pervasive use of AI through intuitive creation, testing, tuning and governance.



Rhonda Klein

*Senior Director of Tax;
Gigamon Inc.*

Contact

rhonda.klein@gigamon.com
408.831.4192 WORK

Education

B.S. Weber State University, Ogden, UT;
M.P.Acy. (Tax) Weber State University,
Ogden UT; CPA California

Professional Organizations

Silicon Valley Chapter of the Tax
Executive Institute

Background

Thirty years of tax experience in
public accounting and Silicon Valley
companies including tax lead roles
in software, hardware and SaaS
industries. Current responsibilities
include worldwide tax planning
and compliance for income and
indirect taxes.

Company Profile

Gigamon Inc.

3300 Olcott Street
Santa Clara, California 95054

Gigamon provides visibility into
physical, virtual and cloud networks.
By minimizing complexity and providing
application-layer intelligence to
every tool, customers can optimize
performance, improve threat detection
and incident response.



Chan K. Chea

*Vice President, Global Head of Tax;
Gilead Sciences, Inc.*

Education

MBT University of Southern California;
BS University of California, Riverside

Professional Organizations

Tax Executives Institute, Orange
County Chapter

Background

Public accounting (with AA and
Deloitte). Private industry (mostly
in biopharma). Areas of notable
experience include international tax,
transfer pricing, income tax accounting,
global supply chain management,
M&A/post-merger integration, and
talent development

Company Profile

Gilead Sciences, Inc.

333 Lakeside Drive
Foster City, California 94404

Gilead Sciences Inc. is a research-
based biopharmaceutical company that
discovers, develops and commercializes
innovative medicines in areas of unmet
medical need.



James J. Gladen

*Vice President Tax;
GitLab Inc.*

Education

B.S. San Diego State University;
M.B.T. University of Southern California

Professional Organizations

Silicon Valley Chapter of the Tax
Executive Institute

Background

29 Years of tax leadership, including
the last 15 years as VP Tax, primarily
in the software, SaaS, and electronic
services industries. Current
responsibilities include worldwide
corporate tax management.

Company Profile

GitLab Inc.

268 Bush Street, Suite 350
San Francisco, California 94104



James K. Lucas

*Vice President, Tax;
GlobalLogic*

Education

B.S. San Jose State University;
M.S.T San Jose State University;
C.P.A. California

Professional Organizations

Santa Clara Chapter of the Tax
Executive Institute; American Institute
of Certified Public Accountants; Silicon
Valley Tax Directors Group

Background

Public accounting and private industry.
Current responsibilities include global
corporate tax.

Company Profile

GlobalLogic

1741 Technology Drive, 4th Floor
San Jose, California 95110

GlobalLogic helps brands create value
across the entire product lifecycle —
not just by developing cutting-edge
technology, but also by helping make
mature products more relevant to
digitally-savvy consumers. By using
human-centered design practices,
superior engineering skills, and agile
delivery — we help customers re-
imagine their business, consumer
interactions, and develop innovative
products and services, with an
accelerated time-to-market.



Jeremy K. Cox

*Senior Vice President, Tax;
Hewlett Packard Enterprise*

Contact

888.342.2156 PHONE

Education

B.A. Accounting, Texas Tech University;
J.D., Southern Methodist University
School of Law

Professional Organizations

State Bar of Texas

Background

Mr. Cox has global responsibility for all
tax matters of HPE and its subsidiaries,
including income and transaction tax
compliance, financial reporting, transfer
pricing, planning, tax policy and audit/
controversy.

Company Profile

Hewlett Packard Enterprise

6280 America Center Drive
San Jose, California 95002

HPE is a global, edge-to-cloud Platform-
as-a-Service company built to transform
your business. How? By helping you
connect, protect, analyze, and act on
all your data and applications wherever
they live, from edge to cloud, so you
can turn insights into outcomes at
the speed required to thrive in today's
complex world.



Brian Lynn

*Global Head of Tax;
HP Inc.*

Contact

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858.774.5847 CELL

Education

JD, Harvard Law School; LLM,
Georgetown University Law Center;
BA (Business Economics),
UC Santa Barbara

Professional Organizations

Tax Executives Institute, American
Bar Association

Background

Law firm and public accounting.
Manage global tax team at HP currently.

Company Profile

HP Inc.

1501 Page Mill Road
Palo Alto, California 94304

HP, Inc. is a provider of products,
technologies, software, solutions and
services to individual consumers,
small- and medium-sized businesses,
and large enterprises, including
customers in the government, health
and education sectors. The Company
provides personal computing and other
access devices, imaging and printing
products, and related technologies,
solutions and services.



Kanthimathi Morrissey

*Chief Tax Officer;
IBM Corporation*

Contact

ksrikant@us.ibm.com
708.381.9664 PHONE
www.ibm.com

Education

BCom from Bangalore University,
Member of Institute of Chartered
Accountants of India, Passed my US
CPA and have a Masters of Science in
Taxation from Fordham University.

Professional Organizations

Institute of Chartered Accountants of
India

Background

3 years in PwC India and then 22 years
in IBM (India, Singapore and US)

Company Profile

IBM Corporation

1 North Castle Drive
Armonk, New York, 10504

As the world's #1 job site, with over
300 million unique visitors every month
from over 60 different countries, Indeed
has become the catalyst for putting the
world to work. Indeed helps companies
of all sizes hire the best talent and
offers the best opportunity for job
seekers to get hired.



Brian Farrell

*Head of Tax;
Indeed*

Contact

bfarrell@indeed.com
+353864107657 OFFICE

Education

B.B.S. Accounting and Finance
University of Limerick

Professional Organizations

ACA Institute of Chartered Accountants
Ireland, ITI Institute of Tax Ireland

Background

Big 4 International tax roles —
Director in KPMG and Deloitte.
Worked in LinkedIn's tax team.
Current responsibilities include
management of the worldwide
tax function for Indeed.

Company Profile

Indeed

124 St Stephen's Green
Dublin 2, Ireland

As the world's #1 job site, with over
300 million unique visitors every month
from over 60 different countries, Indeed
has become the catalyst for putting the
world to work. Indeed helps companies
of all sizes hire the best talent and
offers the best opportunity for job
seekers to get hired.



David Edquist

*Senior Vice President, Tax;
Ingram Micro Inc.*

Education

B.S. Finance, University of Illinois;
J.D. University of North Carolina;
LL.M. (Taxation) Georgetown University

Professional Organizations

San Diego Chapter of the Tax
Executive Institute

Background

Public accounting and corporate tax
management. Currently responsible for
worldwide corporate tax management.

Company Profile

Ingram Micro Inc.

3351 Michelson Drive, Suite 100
Irvine, California 92612

Ingram Micro is a Fortune 100
Company that delivers a full spectrum
of global technology and supply chain
services to businesses around the
world. Deep expertise in technology
solutions, mobility, cloud, and supply
chain solutions enables Ingram Micro's
business partners to operate efficiently
and successfully in the markets
they serve.



Ben Wylie

*Senior Director, Tax;
Instacart*

Education

BS Acc. - University of Missouri; BEc - University of Missouri; MAcc - University of Missouri; C.P.A. Missouri

Background

Ben has 25 years of experience serving in public accounting and industry. He is based in the Bay Area and the Head of Tax at Instacart. Prior to his current role, Ben served as a Senior Director at Walmart, where he led the eCommerce division. Before Walmart, he was a Director in the SALT group at PwC in New York.

Company Profile

Instacart

50 Beale Street Street, #600
San Francisco, California 94105

Instacart, the leading grocery technology company in North America, works with grocers and retailers to transform how people shop. The company partners with more than 1,500 national, regional, and local retail banners to facilitate online shopping, delivery and pickup services from more than 85,000 stores across North America on the Instacart Marketplace. Instacart makes it possible for millions of people to get the groceries they need from the retailers they love, and for approximately 600,000 Instacart shoppers to earn by picking, packing and delivering orders on their own flexible schedule.



Sandra Hahn

*Global Head of Tax;
Intuit Inc.*

Contact

sandra_hahn@intuit.com

Education

B.S. Accounting/Finance, U.C. Berkeley;
M.S. Taxation, Golden Gate University;
M.B.A. University of Santa Clara;
C.P.A. California

Professional Organizations

AICPA, TEI

Background

Public accounting and corporate tax management. Currently responsible for worldwide corporate tax function.

Company Profile

Intuit Inc.

2700 Coast Avenue
Mountain View, California 94043

Intuit Inc. provides business and financial management solutions for small businesses, consumers, and accounting professionals in the United States, Canada, the United Kingdom, Australia, India, and Singapore.



Jonathan C Grahmann

*Vice President - Tax;
Intuitive Surgical*

Contact

jonathan.grahmann@intusurg.com

Education

B.B.A and M.P.A, University of Texas at Austin

Professional Organizations

Texas Society of CPAs

Background

Public Accounting and private industry, primarily in technology. Currently responsible for all taxes globally.

Company Profile

Intuitive Surgical



Diana Chan

*Executive Director - Tax;
Jazz Pharmaceuticals*

Education

B.A. UC Berkeley (Molecular & Cell Biology); B.A. UC Berkeley (Economics); M.S.T. Golden Gate University (Taxation); C.P.A. California

Professional Organizations

Tax Executive Institution

Company Profile

Jazz Pharmaceuticals

3170 Porter Drive
Palo Alto, California 94304



Michael Kelchen

*Vice President, Global Tax;
Keysight Technologies, Inc.*

Education

BA University of Missouri-Columbia; JD Tulane University School of Law; LLM Northwestern University School of Law

Professional Organizations

New York State Bar

Background

Vice President, Head of Global Tax for Keysight Technologies.

Company Profile

Keysight Technologies, Inc.

1400 Fountaingrove Parkway
Santa Rosa, California 95403

Keysight provides electronic design and test instruments, software and services to enable our customers to design, development and manufacture electronic products.



Jim Cordoba

*Vice President, Tax;
KLA Corporation*

Contact

jim.cordoba@kla.com

Education

M.S. Taxation, California State University, East Bay

Professional Organizations

Tax Executive Institute

Background

Public accounting and corporate tax management. Current responsible for worldwide corporate tax management.

Company Profile

KLA Corporation

One Technology Drive
Milpitas, California 95035

KLA-Tencor Corporation, a leading provider of process control and yield management solutions, partners with customers around the world to develop state-of-the-art inspection and metrology technologies. These technologies serve the semiconductor, data storage, LED, photovoltaic, and other related nanoelectronics industries.



K. Alia Ayub

*Vice President, Tax;
Lam Research Corporation*

Contact

alia.ayub@lamresearch.com
510.572.4080 PHONE

Education

B.A. in Accounting and M.S. in Public Administration, Punjab University

Professional Organizations

AICPA; CALCPA

Background

Twenty years of corporate tax experience with accounting firms and technology companies. Responsible for worldwide corporate taxes in the current position.

Company Profile

Lam Research Corporation

4650 Cushing Parkway
Fremont, California 94538

Lam Research Corporation is a supplier of wafer fabrication equipment and services to the worldwide semiconductor industry.



Darius Portela

*Senior Director, Tax & Treasury;
Lattice Semiconductor Corporation*

Education

B.S. Business Administration (Accounting and Finance) The Master's University; M.S.A.T. Boise State University; C.P.A. Idaho, C.T.P.

Professional Organizations

Gem State Tax Symposium Board Member; American Institute of Certified Public Accountants; Tax and Design Committee Semiconductor Industry Association

Background

Public accounting and private industry, including US and international tax planning, global tax provision and reporting, compliance and transfer pricing, M&A due diligence and structuring. Current responsibilities include leading the global corporate tax & treasury function for a publicly traded semiconductor company.

Company Profile

Lattice Semiconductor Corporation

2115 O'Nel Drive
San Jose, California 95131

Lattice Semiconductor was founded in 1983 and is an American semiconductor company that specializes in the design and manufacturing of low power, field-programmable gate arrays and related software solutions. With a large presence in Oregon and California and a global footprint including China, Philippines, Singapore, Malaysia, Taiwan, India, and Canada.



Benita Wold

*Vice President, Tax;
Liffott Mobile, Inc.*

Contact

bwold@liffott.io

Education

B.Sc. (Biochem) University of British Columbia; MBA UBC; CPA British Columbia Canada

Professional Organizations

Chartered Professional Accountant of British Columbia; North Bay Tax Directors Group

Background

Public accounting, private and public industry experience. Current responsibilities include global corporate tax.

Company Profile

Liffott Mobile, Inc.

900 Jefferson Ave, 4th Floor
Redwood City, California 94063

Liffott Mobile, Inc., a BlackStone Group portfolio company, is a leader in mobile app advertising by end to end technological functionalities that fuels the entire mobile app growth cycle across user acquisition, creative, engagement, influencer marketing, monetization and analytics.



Markus Dinkel

*Vice President, Corporate Tax;
LiveRamp, Inc.*

Education

B.S. Managerial Economics, University of California at Davis; M.S. Taxation, Golden Gate University; C.P.A. California

Professional Organizations

Tax Executives Institute

Background

Public accounting and corporate tax management. Currently responsible for the management of LiveRamp's worldwide tax function.

Company Profile

LiveRamp, Inc.

225 Bush Street, 17th Floor
San Francisco, California 94104

LiveRamp enables companies and their partners to better connect, control, and activate data to transform customer experiences and generate more valuable business outcomes. Our fully interoperable infrastructure delivers end-to-end addressability for the world's top brands, agencies, and publishers and our neutral and open approach ensures that our clients can select from among best-in-class partners and technology to meet their specific needs.



Gretchen Horwitz

*Global Head of Tax;
Logitech Inc.*

Contact

ghorwitz@logitech.com
510.795.8500 PHONE

Education

BBA, University of Cincinnati

Background

- 1994 - 2011 - Deloitte - Cincinnati, London, Chicago, New York
- 2011-2020 - Cognizant - VP, Global Tax
- 2020 - 2024 - Baker Hughes, Chief Tax Officer
- Dec 2024 - Present - Logitech, Inc. - Global Head of Tax

Company Profile

Logitech Inc.

3930 North First Street
San Jose, California 95134

Logitech International S.A. is a Swiss multinational manufacturer of computer peripherals and software. Headquartered in Lausanne, Switzerland, the company has offices throughout Europe, Asia, Oceania, and the Americas, and is one of the world's leading manufacturers of input and interface devices for personal computers (PCs) and other digital products. It is a component of the flagship Swiss Market Index, and listed on the Nasdaq.



Angela Sun

*Global Head of Tax;
Lucid Motors*

Contact

www.lucidmotors.com

Education

B.S. Finance, University College of the Cariboo; M.S. Taxation, Golden Gate University; C.P.A. California

Professional Organizations

Santa Clara Valley Chapter of TEI

Background

Public accounting and corporate tax management. Current responsibilities include worldwide corporate tax.

Company Profile

Lucid Motors

7373 Gateway Boulevard
Newark, California 94560



Gregg S. Morrison

*Senior Vice President, Treasurer
& Head of Global Tax;
Marvell Technology, Inc.*

Contact

gmorrison@marvell.com

Education

University of Connecticut (Acctg);
University of New Haven (MS Taxation);
Harvard Business School

Professional Organizations

Twice President of Orange County
Chapter of the Tax Executive Institute;
CT Society of CPAs (currently inactive)

Background

Public Accounting and Semiconductor
Industry (Tax, Treasury, Shareholder
Services, Operations). Current
responsibilities at Marvell include
Global Treasury & Tax, Enterprise
Risk Management, and North
American Payroll.

Company Profile

Marvell Technology, Inc.

5488 Marvell Lane
Santa Clara, California 95054

Marvell is a leading fabless
semiconductor company with expertise
in microprocessor architecture and
digital signal processing that drives
multiple platforms including high
volume storage solutions, mobile and
wireless, networking, consumer and
green products.



Rebecca Shaffer

*Senior Vice President of Tax;
Match Group*

Contact

rebecca.shaffer@match.com

Professional Organizations

Pennsylvania Institute of Certified Public
Accountants

Background

Five years of public accounting (EY);
20 years of tax experience in retail
industry (Dicks Sporting Goods,
Bloomin Brands and Michaels Arts
and Crafts); New to technology in
2022 (Match)

Company Profile

Match Group

Match Group owns and develops
online dating services apps and
websites including Match.com, Tinder,
OK Cupid, Plenty of Fish among others.



Frances Erskine

*Vice President, Tax;
Meta Platforms, Inc.*

Contact

franerskine@meta.com

Education

B.S. University of Illinois at Chicago;
M.S.T. Depaul University

Professional Organizations

AWBi Board Member

Background

Public accounting and corporate tax
management. Currently responsible for
worldwide corporate tax affairs.

Company Profile

Meta Platforms, Inc.

1 Hacker Way
Menlo Park, California 94025

Our mission is to give people the power
to build community and bring the world
closer together.



Alex Biegert

*Corporate Vice President, Tax;
Micron Technology, Inc.*

Education

Masters of Accounting, University of North Carolina at Chapel Hill; B.A., University of North Carolina at Chapel Hill

Professional Organizations

California Certified Public Accountant (inactive)

Background

Public accounting and corporate tax management. Currently responsible for worldwide corporate tax.

Company Profile

Micron Technology, Inc.

130 Holger Way
San Jose, California 95134

We are a world leader in innovative memory solutions that transform how the world uses information. For over 45 years, our company has been instrumental to the world's most significant technology advancements, delivering optimal memory and storage systems for a broad range of applications.



Daniel Goff

*Corporate Vice President
Worldwide Tax & Trade;
Microsoft Corporation*

Education

B.S. Accounting, University of Idaho;
J.D. University of Idaho; LL.M. (Taxation)
New York University School of Law

Professional Organizations

Tax Executives Institute, Manufacturers Alliance (MAPI), and the California and Idaho State Bars

Background

Corporate Tax. Current responsibilities include worldwide corporate tax management.

Company Profile

Microsoft Corporation

One Microsoft Way
Redmond, Washington 98052

Microsoft was founded in 1975. Our mission is to enable people and organizations throughout the world to do more and achieve more by creating technology that transforms the way people learn, work, play, and communicate. We develop and market software, services, and devices that deliver new opportunities, greater convenience, and enhanced value to people's lives. We do business worldwide and have offices in more than 100 countries.



Dale Green

*Director of Corporate Taxes;
Monolithic Power Systems, Inc.*

Contact

Dale.Green@monolithicpower.com
425.371.5179 PHONE
www.monolithicpower.com

Education

Master of Accounting In Tax – Brigham Young University

Professional Organizations

Tax Executive Institute

Background

Dale R. Green, CPA, is a seasoned tax executive with more than two decades of leadership experience guiding multinational corporations through complex U.S. and international tax landscapes. He has a deep technical experience of ASC 740 and income tax accounting, combined with extensive expertise in global tax planning, compliance, systems implementation, and cross-functional strategic initiatives.

Company Profile

Monolithic Power Systems, Inc.

5808 Lake Washington Blvd. NE
Kirkland, Washington 98033

Monolithic Power Systems, Inc. is a fabless global company that provides high-performance, semiconductor-based power electronics solutions. Incorporated in 1997.



Josh Mishoe

*Head of Global Tax;
Netflix*

Education

JD University of Florida; MAcc University of West Florida; MBA University of West Florida; BA University of Northern Iowa

Professional Organizations

Georgia and American Bar Associations;
Tax Executives Institute

Background

Prior to joining Netflix Josh was with Hewlett Packard Enterprise, Time Warner and Hunton & Williams (now Hunton Andrews)

Company Profile

Netflix

121 Albright Way
Los Gatos, California 95032

Netflix is one of the world's leading entertainment services with over 300 million paid memberships in over 190 countries enjoying TV series, films and games across a wide variety of genres and languages. Members can play, pause and resume watching as much as they want, anytime, anywhere, and can change their plans at any time.



Erin Stuart-Cayot

*Vice President Global Tax;
Netskope*

Contact

ecayot@netskope.com

Education

B.S. Economics; M.S. Accounting;
M.S. Taxation

Professional Organizations

Tax Executive Institute; American Institute of Certified Public Accountants; Board and Audit Committee of Encompass Community Services

Background

Have been the leader of Global High Tech tax departments for 20+ years including Plantronics, Cymer and JDS Uniphase. Prior to leading the tax function worked for Ernst and Young and tech companies in their tax groups.

Company Profile

Netskope

2445 Augustine Drive, 3rd Floor
Santa Clara, California 95054

Netskope is a cloud application analytics and policy company which provides a SaaS based platform that enables enterprises to keep their data and users secure worldwide. It offers Netskope Security Cloud that provides visibility and real-time data and threat protection when accessing cloud services, websites and private apps from anywhere on any device.



Priya Roche

*Vice President, Global Tax and Treasury;
Nutanix Inc.*

Education

M.S. Taxation, San Jose State University; C.P.A. California, MBA Finance

Background

Manage all aspects of global Tax and Treasury in publicly traded, high growth multinational companies. Experience in both public accounting and Technology companies.

Company Profile

Nutanix Inc.

1740 Technology Drive
San Jose, California 95110

Nutanix, Inc. is a cloud computing company that sells hyper-converged infrastructure software, cloud services, and software-defined storage.



Mark Hoose

*Vice President Global Tax;
NVIDIA Corporation*

Education

L.L.M. Taxation, Georgetown;
J.D., George Washington;
B.S., University of Illinois, Minor in
Accountancy

Company Profile

NVIDIA Corporation

2788 San Tomas Expressway
Santa Clara, California 95050

NVIDIA is a world leader in Artificial
Intelligence Computing.



William DeFazio

*Senior Vice President Tax and Treasury;
Okta*

Contact

bill.defazio@okta.com
203.913.2034 CELL

Education

BS Elmira College; MBA Sacred Heart
University; MS Taxation University of
New Haven; CPA, New York

Professional Organizations

North Bay Tax Directors Group, TEI,
AICPA, NYSSCPA

Background

Currently Head of Tax and Treasury for Okta,
responsible for all tax and treasury matters
globally. Prior to Okta, held tax/treasury
leadership roles at Blackhawk Network,
Time Inc. and 21st Century Fox, and was
also a TMT tax partner with Ernst & Young
and a senior manager with PwC, both in
New York.

Company Profile

Okta

100 First Street, Suite 600
San Francisco, California 94105

Okta is the leading independent identity
management platform for the enterprise.
Okta's vision is to enable everyone to safely
use any technology, and we believe identity
is the key to making that happen. Okta's
mission is to bring simple and
secure data access to people and
organizations everywhere.



Shannon Janis

*Vice President Global Tax;
onsemi*

Contact

shannon.janis@onsemi.com

Education

Master of Taxation; University of
Wisconsin Milwaukee; Bachelor of
Science in Accounting, Spanish Minor,
University of Wisconsin

Background

Shannon Janis is the Vice President,
Global Tax and Finance Transformation
at onsemi, a Fortune 500 manufacturer
of intelligent power and intelligent
sensing semiconductor products. She
has over 20 years of experience in
global tax operations, including 8 years
at onsemi, and has a broad base of
knowledge in the areas of global tax
policy and incentives, transfer pricing,
international tax and M&A.

Company Profile

onsemi

5701 N. Pima Road
Attn: Finance Tax Department
Scottsdale, Arizona 85250

onsemi (Nasdaq: ON) is driving
disruptive innovations to help build
a better future. With a focus on
automotive and industrial end-
markets, the company is accelerating
change in megatrends such as vehicle
electrification and safety, sustainable
energy grids, industrial automation, and
5G and cloud infrastructure.



Greg Hilbrich

*Executive Vice President and Treasurer;
Oracle Corporation*

Education

B.S., Chemical Engineering, University of California, Davis; J.D., University of California, Berkeley (Boalt Hall); Member of Ohio and California State Bars; Ohio C.P.A.

Professional Organizations

Tax Executives Institute

Background

Private law practice and corporate tax management. Current responsibilities include tax and customs.

Company Profile

Oracle Corporation

500 Oracle Parkway, MS 50p6
Redwood Shores, California 94065

Oracle Corporation, the world's largest enterprise software company founded in 1977, engages in the development, manufacture, distribution, servicing, and marketing of database, middleware, and application software designed to help customers manage and grow their business operations. The company operates in five segments: New Software Licenses, Software License Updates and Product Support, Consulting, On Demand, and Education. Oracle distributes its products and services to businesses of many sizes, government agencies, educational institutions and resellers.



Alecia Wu

*Senior Director of Global Tax;
Ouster Inc.*

Contact

alecia.wu@ouster.io
669.275.2523 PHONE

Education

B.S.C. Santa Clara University

Professional Organizations

Santa Clara Valley Chapter of the Tax Executive Institute; California Society of Certified Public Accountants

Background

Public accounting and industry. Current responsibilities include worldwide corporate tax.

Company Profile

Ouster Inc.

5521 Hellyer Avenue
San Jose, California 95138

Ouster, Inc. is building the eyes of autonomy. We are a leading global provider of light detection and ranging ("lidar") sensors for the automotive, industrial, robotics, and smart infrastructure industries. Ouster's products include high-resolution scanning and solid-state digital lidar sensors, Velodyne Lidar sensors, and software solutions.



Lilack Ben Zeev

*Vice President Head of Global Tax;
Palo Alto Networks Inc*

Contact

lzeev@paloaltonetworks.com
650.475.6798 OFFICE

Education

B.A. Accounting and Economy, University of Haifa, Israel; MBA, University of Haifa, Israel

Professional Organizations

Silicon Valley Chapter of Tax Executives Institute

Background

I joined Palo Alto Networks in 2015 and currently serve as VP, Head of Global Tax. In this role, I oversee the company's global tax compliance strategy and support international expansion while leading a team of more than 30 professionals across India, Amsterdam, London, and California.

Company Profile

Palo Alto Networks Inc

3000 Tannery Way
Santa Clara, California 95054

Palo Alto Networks is the global cybersecurity leader, committed to making each day safer than the one before with industry-leading, AI-powered solutions in network security, cloud security, and security operations. Powered by Precision AI, our technologies deliver precise threat detection and swift response, minimizing false positives and enhancing security effectiveness.



Ameeta Patel

*Senior Vice President, Chief Tax Officer;
PayPal Holdings Inc.*

Contact

amepatel@paypal.com

Education

B.A. Stanford University; JD, MBA,
LLM Georgetown University Law Center

Professional Organizations

California Bar Association, ABA,
TEI, USCIB

Background

Global corporate tax

Company Profile

PayPal Holdings Inc.

2211 North First Street
San Jose, California 95131

PayPal is a leading technology platform company that enables digital and mobile payments on behalf of consumers and merchants worldwide. We put our customers at the center of everything we do. We strive to increase our relevance for consumers, merchants, friends and family to access and move their money anywhere in the world, anytime, on any platform and through any device. We provide safer and simpler ways for businesses of all sizes to accept payments from merchant websites, mobile devices and applications, and at offline retail locations through a wide range of payment solutions across our Payments Platform.



Hans Tanzler

*Vice President, Tax
Penguin Solutions*

Education

LLM (Tax) - University of Florida; JD -
University of Florida; MBA - University of
Florida; M.S. (Accounting) - University of
Florida; B.S. (Accounting) - University of
Florida; Executive Education (General
Management) - Harvard Business
School; C.P.A. - Florida; Licensed
Attorney - Florida

Professional Organizations

Tax Section of the Florida Bar (member);
Federal Bar Association (member);
American Institute of Certified Public
Accountants (member)

Background

Leading the global tax function at
Penguin Solutions, a multinational
artificial intelligence company.

Company Profile

Penguin Solutions

39870 Eureka Drive
Newark, California 94560-4809

Penguin Solutions, Inc. is an end-to-end technology company. The Company's segments include Advanced Computing, Integrated Memory, and Optimized LED. Its Advanced Computing segment offers specialized platform solutions and services for artificial intelligence, high-performance computing, machine learning, advanced modeling and the internet of things that span the continuum of edge, core and cloud under its Penguin Computing and Stratus brands. Its Integrated



John Buchta

*Vice President, Tax;
Pinterest*

Company Profile

Pinterest

651 Brannan Street
San Francisco, California 94107

Pinterest's mission is to bring everyone the inspiration to create a life they love. It's the biggest dataset of ideas ever assembled, with over 100 billion recipes, home hacks, style inspiration and other ideas to try. More than 640 million people around the world use Pinterest to dream about, plan and prepare for things they want to do in life.



Lance Heinig

*Vice President, Tax & Trade;
Pure Storage, Inc.*

Education

B.A. California State University,
Hayward, Accounting & Finance;
M.S.T. California State University,
Hayward; C.P.A. California

Professional Organizations

Santa Clara Valley Chapter of the Tax
Executive Institute

Background

Public accounting. Current
responsibilities include worldwide
corporate tax.

Company Profile

Pure Storage, Inc.

650 Castro Street, Suite 400
Mountain View, California 94041



Roberta L. Swanson

*Vice President, Global Head of Tax;
Qualcomm, Inc.*

Contact

rlswan@qualcomm.com
858.658.2233 OFFICE

Education

B.A. UC Santa Barbara; M.S.T. Golden
Gate University; C.P.A. California

Professional Organizations

Orange County Chapter of the Tax
Executive Institute; America Institute
of Certified Public Accountants; Board
Member Girl Scouts of Orange County;
Tax Committee Semiconductor Industry
Association

Background

Public accounting and private industry.
Current responsibilities include global
corporate tax and Trade.

Company Profile

Qualcomm, Inc.

5775 Morehouse Drive
San Diego, California 92121

We are a global leader in the
development and commercialization
of foundational technologies for
the wireless industry, including
3G (third generation), 4G (fourth
generation) and 5G (fifth generation)
wireless technologies and processor
technologies including high-
performance, low-power computing
and on-device artificial intelligence (AI)
technologies. Our technologies and
products are used in mobile devices
and other wireless products.



Crystal Chen

*Tax Director;
QuantumScape Corporation*

Education

Master of Science in Accountancy
from University of Illinois at Urbana-
Champaign; CPA California

Professional Organizations

America Institute of Certified Public
Accountants

Background

Public accounting and private industry.
Current responsibilities include global
corporate tax and risk management.

Company Profile

QuantumScape Corporation

1730 Technology Drive
San Jose, California 95110

QuantumScape is a leader in
developing next-generation solid-state
lithium-metal battery technology for
electric vehicles ("EVs") and other
applications. QuantumScape's solid-
state lithium-metal battery technology
is designed to offer greater energy
density, faster charging, and enhanced
safety when compared to today's
conventional lithium-ion batteries.



Annie Herlitz

*Vice President of Finance & Tax;
Robinhood*

Education

B.A. University of California at Riverside;
J.D. University of Oregon;
LL.M. Georgetown University

Professional Organizations

American Bar Association

Company Profile

Robinhood

85 Willow Road
Menlo Park, California 94025



Shellie K. Sakamoto

*Head of Tax;
Roku, Inc.*

Education

B.S. University of Southern California,
M.S.T. Golden Gate University, C.P.A.
California

Professional Organizations

Silicon Valley Chapter of the Tax
Executive Institute; California Society
of CPAs

Background

Public accounting and private industry
experience. Current responsibilities
include global corporate tax.

Company Profile

Roku, Inc.

1173 Coleman Avenue
San Jose, California 95110

Roku is a leading developer and
provider of a TV streaming platform
that connects and benefits the shift of
the entire TV ecosystem to streaming
for viewers, content partners and
advertisers.



Darryl Yee

*Executive Vice President, Tax, Risk
Management, and Japan Finance;
salesforce.com*

Education

B.A. Economics, UCLA; MST, Golden
Gate University

Background

Darryl started his career at Ernst &
Young. After almost 17 years with
the firm, he joined McKesson to lead
the company's financial tax reporting
function. Thereafter, Darryl joined Visa
to lead the company's domestic tax
planning and controversies function.
Currently, he is responsible for
Salesforce's global tax function as well
as other finance functions.

Company Profile

salesforce.com

415 Mission Street
San Francisco, California 94105

Salesforce is the world's leading
customer relationship management
technology, helping you build and
improve your customer relationships. In
1999 we pioneered cloud-based CRM,
and today we're helping organizations
of all sizes re-imagine their business for
the world of AI. How? With Agentforce,
providing trusted, autonomous AI
agents that take action for your
employees and customers. With unified
data from all your systems, so every
employee has a 360-degree view of
every customer. And with #1 CRM
apps for your sales, service, marketing,
commerce, and IT teams.



Temikia Montford

*Vice President, Tax;
Samsara, Inc.*

Contact

678.373.4976 OFFICE
www.samsara.com

Education

B.S. Indiana University, Kelley School
of Business; C.P.A. Georgia

Professional Organizations

Georgia Society of CPAs; International
Fiscal Association; Tax Executives
Institute

Background

Public accounting and large
US publicly traded multinationals
spanning numerous industries
including manufacturing, insurance,
and technology. Current responsibilities
include all aspects of global
corporate tax.

Company Profile

Samsara, Inc.

1 De Haro Street
San Francisco, California 94103

Samsara (NYSE: IOT) is the pioneer
of the Connected Operations™ Cloud,
which is a platform that enables
organizations that depend on physical
operations to harness Internet of
Things (IoT) data to develop actionable
insights and improve their operations.
Samsara operates in North America
and Europe and serves tens of
thousands of customers across a
wide range of industries.



Jon Alleman

*Vice President Tax;
Sandisk Corporation*

Contact

801.735.5034 PHONE

Education

MAcc, Accounting/Tax, Brigham Young
University

Professional Organizations

Utah CPA, American Institute of
Certified Public Accountants

Background

Previously spent time at Grant Thornton
LLP, Goldman Sachs & Co., Ancestry,
and Unity Technologies. Currently
managing Sandisk Corporation's global
tax function.

Company Profile

Sandisk Corporation

951 Sandisk Drive
Milpitas, California 95035

Sandisk will focus on delivering a broad
and ever-expanding portfolio of flash-
based products. Sandisk also pursues
emerging development of disruptive,
new memory technologies.



Henry Garrido III

*Senior Director, Global Tax;
Seagate Technology*

Background

Public accounting and private industry.
Current responsibilities include global
corporate tax.

Company Profile

Seagate Technology

47488 Kato Road
Fremont, California 94538

Seagate is a world leader in hard disk
drives and storage solutions.



Venkata J. Dhunaka

*Senior Director, Tax;
Semtech Corporation*

Contact

vdhunaka@semtech.com
805.480.2184 PHONE

Education

Masters in Accounting from Nagarjuna University, India; CPA California

Professional Organizations

America Institute of Certified Public Accountants

Background

Dhunaka worked at EY for about 15 years and 4 years at Semtech. Currently, Head of Global Tax at Semtech and responsibilities include global tax and trade matters.

Company Profile

Semtech Corporation

200 Flynn Road
Camarillo, California 93012

Semtech is a leading supplier of high performance analog and mixed-signal semiconductors and advanced algorithms.



Jennifer A. Raney

*Vice President, Tax & Treasury;
SentinelOne*

Education

B.S. Business Administration,
Accounting Concentration; CPA,
State of California

Professional Organizations

Tax Executives Institute

Background

Big 4 accounting firm (EY San Jose) and high-tech public company industry experience. Current responsibilities include global corporate income and indirect tax as well as treasury.

Company Profile

SentinelOne

444 Castro Street, Suite 400
Mountain View, California 94041

SentinelOne was founded in 2013 by an elite team of cybersecurity and defense experts who developed a fundamentally new, groundbreaking approach to endpoint protection. SentinelOne is a pioneer in delivering autonomous security for the endpoint, datacenter and cloud environments to help organizations secure their assets with speed and simplicity. SentinelOne unifies prevention, detection, response, remediation and forensics in a single platform powered by artificial intelligence.



Elisabeth Loew

*Vice President Tax;
ServiceNow*

Company Profile

ServiceNow

2225 Lawson Lane
Santa Clara, California 95054

ServiceNow was founded on a simple premise: a better technology platform will help work flow better. Our purpose is to make the world work better for everyone. We help global enterprises across industries, universities and governments to digitize their workflows — the individual tasks that need to be executed to get a job done. Our technology platform, which we refer to as the Now Platform, seamlessly connects workflows across siloed organizations and systems in a way that unlocks productivity, improves experiences for both employees and customers and delivers real business outcomes.



Jonathon Locascio

*Vice President of Tax;
Snap Inc.*

Contact

jonathon@snap.com

Education

M.B.T. University of Southern California;
B.A./B.S. University of California,
Berkeley; C.P.A. California

Professional Organizations

Los Angeles Country Chapter of Tax
Executives Institute; American Institute
of Certified Public Accountants

Background

Public accounting and corporate tax
management. Currently responsible for
worldwide corporate tax management.

Company Profile **Snap Inc.**

2772 Donald Douglas Loop N
Santa Monica, California 95054

Hundreds of millions of people use
Snapchat every day to Snap with
family, watch Stories from friends,
see events from around the world,
and explore expertly-curated content
from top publishers. In short, we are
a passionate team working hard to
build the best platform in the world for
communication and storytelling.



Michael Bumbaca

*Vice President, Tax;
Snowflake Inc.*

Contact

michael.bumbaca@snowflake.com
www.snowflake.com

Education

J.D. University of Ottawa; LL.M.
Corporate Law New York University;
LL.M. Tax New York University

Background

Former roles in law firms, public
accounting, and private industry.
Currently responsible for worldwide
corporate tax management.

Company Profile **Snowflake Inc.**

450 Concar Drive
San Mateo, California 94402

Snowflake created the Data Cloud—
a global network where thousands
of organizations mobilize data with
near-unlimited scale, concurrency, and
performance. Inside the Data Cloud,
organizations unite their siloed data,
easily discover and securely share
governed data, and execute diverse
analytic workloads. Snowflake's
platform is the engine that powers and
provides access to the Data Cloud,
creating a solution for applications,
collaboration, cybersecurity, data
engineering, data lake, data science,
data warehousing, and unistore.
Snowflake's vision is a world with
unlimited access to governed data,
so every organization can tackle the
challenges and opportunities of today
and reveal the possibilities of tomorrow.



Chase Bradshaw

*Senior Director, Global Head of Tax;
SoFi Technologies, Inc.*

Education

Master's degree, Accounting - Tax,
Brigham Young University; Bachelor's
degree, Accounting, Brigham Young
University

Professional Organizations

CPA in California, Board Member of
Utah Chapter of Tax Executive Institute

Background

Current responsibilities are primarily
global tax. Leadership responsibilities
extend into global equity, payroll and
technology transformation. Previous
experiences were in public accounting
at EY.

Company Profile **SoFi Technologies, Inc.**

234 1st Street
San Francisco, California 94105

SoFi Technologies, Inc. (SOFI) is a
digital financial services company
offering a wide range of products and
services, including lending, technology
platform, and financial services, all
designed to help members manage
their money. The company's mission
is to empower individuals to achieve
financial independence and realize their
ambitions through its comprehensive
suite of products.



Donald Blach

*Vice President, Tax;
Sophos*

Contact

don.blach@sophos.com

Education

Bachelor of Science, Accounting and Management, Santa Clara University;
Juris Doctor, Santa Clara University

Professional Organizations

Silicon Valley Chapter of Tax Executive Institute; American Institute of Certified Public Accountants; California State Bar Association

Background

Public accounting and private industry. Current responsibilities include global corporate tax.

Company Profile

Sophos

3945 Freedom Circle #1100
Santa Clara, California 95054

Sophos is an industry-leading cybersecurity company. Sophos is a global leader in next-gen, cloud-managed network and end user cybersecurity, harnessing the power of world-leading artificial intelligence, through deep learning neural networks, to adapt ever more quickly to the emerging threat landscape.



Humberto Reboredo

*Head of Tax & Tax Policy;
Stripe, Inc.*

Contact

humberto@stripe.com
305.804.6756 CELL
www.stripe.com

Education

JD, Harvard Law School. BBA, Accounting, University of Miami

Professional Organizations

New York State Bar

Background

Extensive career as a tax lawyer both at a law firm and in-house and a tax director leading global functions at Credit Suisse and Morgan Stanley before joining Stripe. Most recent experience was as CFO of Morgan Stanley's Institutional Securities Segment

Company Profile

Stripe, Inc.

354 Oyster Point Blvd.
South San Francisco, CA 94080

Stripe's focus is to grow the GDP of the internet. Our core product is our payments product and we offer many other products and services in the space.



Ryan Oh

*Executive Director,
Global Tax and Treasury;
Structure Therapeutics, Inc.*

Contact

ryan.oh@structuretx.com
www.structuretx.com

Education

M.B.A Accounting and Tax, Golden Gate University; CPA California Professional Organizations
San Jose Chapter of the Tax Executive Institute; America Institute of Certified Public Accountants

Background

Public accounting (EY & others) and private industry. Current responsibilities include global corporate tax, treasury, and risk insurance management.

Company Profile

Structure Therapeutics, Inc.

601 Gateway Blvd. Suite 900
San Francisco, California 94080



Vicki Huang

*Global Head of Tax;
Supermicro Computer, Inc.*

Contact

vickif@supermicro.com
408.612.5807 PHONE

Education

Master of Accountancy - University of South Dakota; Master of Taxation - San Jose State University; C.P.A. California

Professional Organizations

AICPA (America Institute of Certified Public Accountants). Silicon Vally Chapter of the Tax Executive Institute (Board Member, Cochair of HOT Committee TEI SVC). Member and prior year board member (Treasurer) of Kona Kai Tennis and Swimming Club

Background

I am a CPA working for private and public companies for the past 25 years in Silicon Vally.

Company Profile

Supermicro Computer, Inc.

601 Gateway Blvd. Suite 900
San Francisco, California 94080

Super Micro Computer, Inc. (commonly known as Supermicro) is a global leader in high-performance, energy-efficient server and storage technology. Headquartered in San Jose, the company designs and manufactures advanced computing solutions, including servers, AI infrastructure, cloud computing platforms, and edge systems.



Kent Nguyen

*Senior Tax Director;
SurveyMonkey*

Education

B.A. University of California Los Angeles;
M.S.T San Jose State University;
C.P.A California

Professional Organizations

AICPA

Background

Big 4 and industry experience, specializing in technology companies.

Company Profile

SurveyMonkey

One Curiosity Way
San Mateo, California 94403

SurveyMonkey is a leader in agile experience management, providing Software-as-a-Service ("SaaS") solutions that help businesses collect and analyze stakeholder sentiment at scale.



Jill Harding

*Vice President Tax, Treasury &
Corporate Planning;
Synopsys, Inc.*

Company Profile

Synopsys, Inc.

675 Almanor Ave
Sunnyvale, California 94085

Synopsys, Inc. is the Silicon to Software™ partner for innovative companies developing the electronic products and software applications we rely on every day. As the world's 16th largest software company, Synopsys has a long history of being a global leader in electronic design automation (EDA) and semiconductor IP and is also growing its leadership in software quality and security solutions. See more at: <http://www.synopsys.com/Company/AboutSynopsys/Pages/CompanyProfile.aspx>.



Drew Adams

*Head of Tax;
Teradyne, Inc.*

Education

B.S Boston College; J.D. Suffolk University Law School; MSF Suffolk University Graduate School; LLM Taxation Boston University Law School

Professional Organizations

New England Chapter of the Tax Executive Institute; Massachusetts Bar Association

Background

Public accounting and private industry including working at PricewaterhouseCoopers, DELL, PerkinElmer, RSA Security and Teradyne. Current responsibilities include global corporate tax, and I have been the Chief Tax Officer for approximately 15 years at companies.

Company Profile

Teradyne, Inc.

600 Riverpark Drive
North Reading, Massachusetts 01864

Teradyne is a global supplier of automated test equipment and robotic solutions. The Semiconductor Test segment includes operations related to the design, manufacturing and marketing of semiconductor test products and services inclusive of storage and system level test products. Its advanced robotics business includes collaborative robots and mobile robots that support manufacturing and warehouse operations for companies of all sizes.



Joe Gruber

*Vice President, Tax;
Tesla, Inc.*

Education

University of Pennsylvania BA;
University of Miami School of Law JD;
New York University School of Law LLM

Background

Law Firm and private industry. Most recently spent past eight years as Senior Vice President of Global Tax at Pfizer.

Company Profile

Tesla, Inc.

13101 Harold Green Road
Austin, Texas 78725

Tesla designs, develops, sells and leases high-performance fully electric vehicles and energy generation and storage systems and offer services related to our sustainable energy products. Our mission is to accelerate the world's transition to sustainable energy.



Agostino Ricupati

*Senior Vice President Tax;
The Cooper Companies*

Contact

925.460.3655 OFFICE

Education

M.S.T. DePaul University; B.S. Accounting Northern Illinois University (NIU)

Background

Chief Administrative Officer and Senior Vice President Tax. A strong finance leader with extensive expertise in life science and technology companies with 20+ years of experience in leading and managing all aspects of financial strategy and operations, including accounting, tax, financial planning and analysis, treasury, and investor relations.

Company Profile

The Cooper Companies

6101 Bollinger Canyon Road, Suite 500
San Ramon, California 94583

Cooper Companies is a global, consumer-centric medical device company that supports how people want to live, at every stage of life. We are a global company with nearly 15,000 employees located in 30 countries across Europe, Asia, Africa, and the Americas. Our corporate headquarters are in San Ramon, CA.



John A. Stowell

*Senior Vice President - Tax, Incentives & International Financial Reporting;
The Walt Disney Company*

Background

Public accounting and corporate tax management; previously led global tax functions for Avery Dennison Corporation and Delphi Automotive PLC

Company Profile

The Walt Disney Company

500 S. Buena Vista Street
Burbank, California 91521-1142

The Walt Disney Company operates as an entertainment company worldwide. The company operates in five segments: Media Networks, Parks and Resorts, Studio Entertainment, Consumer Products, and Interactive. The company was founded in 1923 and is based in Burbank, California.



Jiao Zhang

*Vice President, Global Tax;
Trimble Inc.*

Education

B.A. in Accounting, Texas A&M University; M.S. in Accounting Concentrating in Tax, Texas A&M University

Background

Public accounting and private industry. Current responsibilities include global corporate tax.

Company Profile

Trimble

510 De Guigne Drive
Sunnyvale, California, 94085

Trimble is a global technology company that connects the physical and digital worlds, transforming the ways work gets done. With relentless innovation in precise positioning, modeling and data analytics, Trimble enables essential industries including construction, geospatial and transportation. Whether it's helping customers build and maintain infrastructure, design and construct buildings, optimize global supply chains or map the world, Trimble is at the forefront, driving productivity and progress.



John Schreiber

*Vice President, Global Tax;
Twilio Inc.*

Education

MBA, Michigan State University;
BSBA, Central Michigan University

Professional Organizations

Licensed Active California CPA;
Manufacturers Alliance for Productivity and Innovation; American Institute of Certified Public Accountants

Background

Public accounting and private industry experience. Current responsibilities include worldwide direct and indirect tax matters.

Company Profile

Twilio Inc.

101 Spear Street, Fifth Floor
San Francisco, California 94105

Twilio is the world's leading cloud communication platform that enables customer engagement across channels — SMS, voice, video, WhatsApp, email and more.



Kirsten Nordlof

*Vice President, Tax;
Uber Technologies*

Education

B.A., Comparative Literature, University of Oregon; J.D., University of Oregon; LL.M., University of Washington

Professional Organizations

Washington State Bar

Background

Kirsten is a lawyer by training and a finance executive by experience. She started her career in the Big Four as an M&A consultant advising technology companies and private equity on large complex transactions in San Francisco, New York, Washington DC and Berlin. She has spent the last decade growing and leading finance functions in the technology industry. Her first love is tax, her passion is nurturing talent and building diverse teams. #taxiscool

Company Profile

Uber Technologies

1515 3rd Street
San Francisco, California 94158

Uber's mission is to create opportunity through movement. We started in 2010 to solve a simple problem: how do you get access to a ride at the touch of a button? More than 25 billion trips later, we're building products to get people closer to where they want to be. By changing how people, food, and things move through cities, Uber is a platform that opens up the world to new possibilities.



Ionut Sas

*Senior Vice President Finance;
UiPath*

Education

BA Finance and Stock Exchange, Academy of Economic Studies, Bucharest, Romania

Professional Organizations

Fellow ACCA Member; Member of Romanian Chamber of Tax Advisors; Previous Board Member (2017–2019) of American Chamber of Commerce in Romania; Member in American Chamber of Commerce in European Union.

Background

Private accounting and tax experience, more than 20 years of experience in this area. Involved predominantly in corporate tax matters, business model reorganisation and efficient tax structure models. Previous tax partner within PwC Romania, had leadership roles for PwC in Central Eastern Europe for Technology industry. Current responsibilities include global corporate tax, tax modelling, equity taxation and payroll operations.

Company Profile

UiPath

One Vanderbilt Avenue, 60th Floor
New York, New York, 10017

UiPath is at the forefront of technology innovation and thought leadership in automation, as the provider of an end-to-end platform that can help customers realize the true potential of digital transformation.



Amy Dodge

*Senior Director, Global Tax;
Unity Software Inc.*

Education

B.A., Arizona State University; J.D., Sandra Day O'Connor College of Law; LL.M., New York University

Background

Public accounting and private industry. Current responsibilities include global corporate tax.

Company Profile

Unity Software Inc.

116 New Montgomery Street
San Francisco, California 94105

Unity is the leading platform to create and grow games and interactive experiences across all major platforms from mobile, PC, and console, to extended reality (XR).



Jenna Wei

*Tax Director;
Upstart Holdings, Inc.*

Education

Master of Science in Taxation from Golden Gate University and Bachelor of Arts in Economics from University of California, Berkeley

Professional Organizations

California-licensed CPA and America Institute of Certified Public Accountants

Background

Public accounting and private industry. Current responsibilities include all aspects of corporate tax matters including financial reporting, direct and indirect tax compliance, information reporting, and tax planning.

Company Profile

Upstart Holdings, Inc.

2950 S. Delaware Street, Suite 300
San Mateo, California 94403

Upstart Holdings, Inc. and its subsidiaries (Nasdaq: UPST) apply modern data science and technology to the process of originating consumer credit. The Company helps originate credit, including personal and auto loans, by providing lending partners with access to a proprietary, cloud-based, artificial intelligence lending marketplace. As the Company's technology continues to improve and additional lending partners adopt the Upstart platform, consumers benefit from improved access to affordable and frictionless credit.



Trevor Russ

*Senior Director, Tax;
Upwork, Inc.*

Education

B.A. Business (Accounting) University of Washington; M.S. Professional Accounting (Taxation) University of Washington

Professional Organizations

Tax Executives Institute, Washington State CPA

Background

Big 4 public accounting and private industry. Currently responsible for global tax at Upwork.

Company Profile

Upwork, Inc.

475 Brannan Street, Suite 430
San Francisco, California 94107

Upwork operates the world's largest work marketplace that connects businesses with independent talent from across the globe, as measured by gross services volume.



Wayne G. Monfries

*Senior Vice President, Global Tax;
Visa Inc.*

Education

B.S. Business Administration (Accounting), Georgetown University

Professional Organizations

Tax Executives Institute

Background

Public accounting and corporate tax management. Currently responsible for worldwide corporate tax management.

Company Profile

Visa Inc.

900 Metro Center Boulevard
Foster City, California 94404-2775

Visa Inc. operates as a payments technology company worldwide. The company facilitates commerce through the transfer of value and information among consumers, merchants, financial institutions, businesses, strategic partners, and government entities. It operates VisaNet, a processing network that enables authorization, clearing, and settlement of payment transactions. In addition, the company offers card products, as well as value-added services. It provides its services under the Visa, Visa Electron, Interlink, V PAY, and PLUS brands. The company was founded in 1958 and is headquartered in San Francisco, California.



Robert Stockton

*Vice President, Global Tax;
Western Digital*

Contact

949.672.7364 OFFICE

Education

B.A. UC Santa Barbara; CPA California

Professional Organizations

Orange County Chapter of the Tax Executive Institute; American Institute of Certified Public Accountants; California Society of CPAs

Background

Two terms at Arthur Andersen in public accounting. Started tax function at Sage Software and am currently on my second term with Western Digital. Current responsibilities include corporate tax across the entire organization both indirect and direct.

Company Profile

Western Digital

3355 Michelson Drive, Suite 100
Irvine, California 92612



Teresa Chen

*Vice President, Tax;
Workday Inc.*

Education

B.A. Accounting, University of Wisconsin at Madison; M.S. Taxation, University of Illinois at Urbana-Champaign; C.P.A. California

Professional Organizations

Santa Clara Valley Chapter of the Tax Executive Institute

Background

Public accounting and hi-tech industry. Current responsibilities include Workday's global corporate tax management.

Company Profile

Workday Inc.

6110 Stoneridge Mall Road
Pleasanton, California 94588

Workday is a leading provider of enterprise cloud applications for finance and human resources. Founded in 2005, Workday delivers financial management, human capital management, and analytics applications designed for the world's largest companies, educational institutions, and government agencies.



Darin Orr

*Vice President, Tax;
Yahoo, Inc.*

Education

B.A., Accounting – Brigham Young University; MAcc, Accounting - Tax Brigham Young University; C.P.A. California

Background

Business leader and global corporate tax expert at Yahoo with diverse experience across multiple industries and companies. Deep expertise in a variety of tax related matters. Significant Board of Directors (Public Company and Private Equity) involvement. Strong focus on team engagement and development.

Company Profile

Yahoo, Inc.

770 Broadway, 9th Floor
New York, New York 10003-9562

Yahoo's media, technology and business platforms connect hundreds of millions of people around the world to the things they love. With apps and sites like Yahoo Sports, Yahoo Finance, Yahoo Fantasy, Yahoo Mail and more and a powerful, open platform that connects brands and publishers to passionate fans, Yahoo is all about putting an exclamation point on what you're into.



Ed Jajeh

*Vice President, Tax, Treasury
and Real Estate;
Yelp Inc.*

Education

B.A. and B.S., University of California
at Davis; J.D., Catholic University;
LL.M., Georgetown University

Professional Organizations

TEI; California Bar

Background

Public Accounting, in-house tax counsel
and tax management. Currently
responsible for global tax, treasury and
real estate matters.

Company Profile

Yelp Inc.

350 Mission Street, 10th Floor
San Francisco, California 94105



Diana Backhouse

*Head of Tax;
Zillow Group*

Contact

dianab@zillowgroup.com
617.233.1256 CELL

Education

B.A. Queen's University - Canada; JD
University of Victoria - Canada; LLM
Harvard Law School - Boston; LLM NYU
School of Law - New York

Professional Organizations

New York State Bar Association

Background

Law firm and private industry. Current
responsibilities include global tax.

Company Profile

Zillow Group

1301 Second Avenue
Seattle Washington, 98101

Zillow's mission is to make
homeownership a reality for more
people by leveraging technology to
streamline buying, selling, financing,
and renting. They focus on increasing
housing accessibility, advocating for
fairer housing policies, and providing
digital tools to empower consumers in
the real estate market.



John Lee

*Head of Tax;
Zoom Communications, Inc.*

Education

MBT, University of Southern California;
BS, University of Southern California

Professional Organizations

Tax Executives Institute

Background

Federal and international tax at
Big 4 firm and industry head of tax
roles. Currently responsible for global
corporate tax matters.

Company Profile

Zoom Video Communications, Inc.

55 Almaden Boulevard, Suite 600
San Jose, California 95113.

Zoom is a system of action for modern
work, turning live collaboration
into completed results. From
entrepreneurs to global enterprises,
customers choose Zoom to seamlessly
collaborate, communicate, and drive
outcomes across meetings, phone,
contact center, and more — all with
the built-in assistance of Zoom AI
Companion. Founded in 2011, Zoom is
headquartered in San Jose, CA.



Jay Lall

*Vice President, Tax;
Zscaler, Inc*

Contact

jlall@zscaler.com

Education

B.A. Economics, University of California,
San Diego; M.S. Accountancy (Tax), San
Diego State University; C.P.A. California

Professional Organizations

Board of Directors, Tax Executives
Institute, Silicon Valley

Background

Public accounting and private industry.
Responsibilities include global
corporate tax.

Company Profile

Zscaler, Inc

120 Holger Way
San Jose, California 95134

The evolution of social, mobile, and cloud has created a need for different security requirements and connectivity. Zscaler's purpose-built security platform puts your defenses and controls where the connections occur — the internet — so that every connection is fast and secure, no matter how or where users connect or where their applications reside.