OUR SPEAKERS

Eric Lesser, Senior Counsel at WilmerHale

Eric Lesser, a former Massachusetts state senator and Obama White House aide, advises clients facing challenges at the intersection of law, business, and public policy issues touching the life sciences, technology, financial services, healthcare, higher education, transportation, and manufacturing industries. As a state senator in Massachusetts, Eric chaired the Committee on Economic Development & Emerging Technologies, co-authoring four major economic development packages over three legislative sessions. He led Senate negotiations for legislation authorizing more than $627 million in aid for families and small businesses in response to COVID-19, and historic zoning reform to alleviate the housing crisis. He co-authored and led negotiations for new laws regarding life sciences, sports wagering, consumer protection, intellectual property, and transportation infrastructure.

Doug Howgate, President of the Massachusetts Taxpayers Foundation

Doug began as President in January 2023, after serving as the Foundation's Executive Vice President for two years. Prior to his time at the Foundation, Doug served as Senior Policy Advisor to Senate President Karen Spilka and as Budget Director for the Senate Committee on Ways and Means from 2010 to 2014. Doug has a B.A. in Political Science from Holy Cross and holds a Master's degree from Georgetown's McCourt School of Public Policy.

Caroline Kupiec, Tax Associate at Sullivan & Worcester

Caroline has an extensive tax controversy and litigation practice. Caroline clerked in the chambers of the Honorable Joseph H. Gale of the United States Tax Court prior to her time at Sullivan. Caroline is a member of Sullivan's Women's Initiative and co-chair of the Boston Bar Association's State and Local Tax Committee. She speaks frequently on Massachusetts tax issues at professional conferences.

Matthew Schnall, Partner at Morgan, Lewis & Bockius

Matthew represents clients in a variety of complex business-related tax matters, including mergers, acquisitions, and other transactional tax matters for public and privately held companies; the formation, structuring, and restructuring of investment funds; and real estate development, leasing, and joint ventures. He represents clients in federal and state tax controversy matters, including audits, administrative appeals, and tax litigation. Matt's federal tax practice covers a full range of corporate, partnership, and international tax issues. He also has a robust state and local tax (SALT) practice, covering issues including corporate and personal income taxes, franchise taxes, sales and use taxes, property taxes, and constitutional issues.

Marikae Toye, Deputy General Counsel at DOR

Marikae Toye joined DOR's General Counsel's Office as Associate General Counsel in 2019 and was later promoted to Deputy General Counsel in 2023. Prior to these roles, she worked in the Department's Litigation Bureau, representing the Commissioner in matters before the Appellate Tax Board. She is a graduate of Rutgers School of Law in Camden, NJ, and completed her undergraduate degree in History at Eastern Nazarene College in Quincy, MA.

Megan Walsh, Partner at WilmerHale

Meghan Walsh is a tax partner in the firm's Boston office. She has extensive experience advising corporations and partnerships with respect to tax matters, including mergers and acquisitions, investments, and joint ventures. She received her JD and LLM in Taxation from Georgetown.

Michael Fatale, General Counsel at DOR

Michael Fatale is the General Counsel at the DOR. Previously, he served as the Deputy General Counsel and Chief of the Rulings & Regulations Bureau. He is an adjunct professor at Boston College Law School and at Boston University School of Law. Michael worked in private practice before joining DOR and holds an undergraduate degree from Columbia University and a law degree, with honors, from Boston College Law School.

Rebecca Forter, Deputy Commissioner of Tax Policy at DOR

Rebecca Forter is the Deputy Commissioner for Tax Policy and Chief of the Rulings & Regulations Bureau at DOR. Prior to joining DOR, she practiced at law firms in New York and Boston, where she advised clients on the federal and international tax implications of various transactions, including private investment fund formations and investments, mergers and acquisitions, joint ventures, and restructurings. She is a graduate of Princeton University and Columbia University School of Law.

Leanne Scott, Senior Director at Alvarez & Marsal Tax

Leanne Scott is a Senior Director in Alvarez & Marsal's Core SALT tax practice, based in Boston. Her primary areas of concentration are income and franchise, gross receipts, and sales and use tax matters, including consulting, planning, compliance, and tax controversies. Prior to joining the firm, Leanne was the state and local tax leader with a regional accounting firm. She previously served as the director of state and local taxes for a Boston-based financial services and insurance company, and has experience with both global and national accounting firms as well. In addition to serving clients, Leanne is a frequent author, contributor, and speaker on various state and local tax topics. Leanne is a graduate of Louisiana State University and Emory University School of Law and also has an LLM in Tax from Boston University.

Bradley Wilhelmson, Managing Director, State and Local Tax and Washington National Tax at KPMG

Brad is a managing director in KPMG's State and Local Tax and Washington National Tax practices. With over twenty years of experience advising clients on various tax matters, he serves as a national resource for KPMG's State and Local Tax practice, with responsibility for tracking developments across state and local jurisdictions and for developing training sessions on current developments. He works closely with clients of various KPMG industry groups, including Asset Management and Integrated Partnership Solutions. In addition, Brad serves as KPMG's primary resource for Illinois and Wisconsin income tax matters and for state elective pass-through entity tax developments.

Scott Roberti, US State Policy Services Leader at EY

Scott is a member of the Ernst & Young LLP National Tax team, leading the firm's State Policy Services practice. Previously, Scott led the state policy team at GE during his career from 1992 to 2017. Today, Scott works with client stakeholders to develop state tax policy models using a wing-to-wing approach from issue identification to government-facing engagement. Scott received his B.A. in Accounting from Niagara University and his M.B.A. in Tax from Pace University's Lubin School of Business.

Justin Theal, Senior Officer of Fiscal 50 at The Pew Charitable Trusts

Justin Theal is a senior officer with Pew's Fiscal 50 project and manages research on key state fiscal trends—including revenue, spending, and reserves—while providing data-driven insights that help policymakers understand and navigate complex fiscal challenges. He plays a leading role in expanding Pew's research on emerging risks to state budgets, including the fiscal impacts of climate change, demographic shifts, and advancing technologies. In this capacity, he also advises policymakers on practices and policies that support long-term budget sustainability and provides expertise in how federal spending and tax policy choices affect state finances.

Cindy Friedman, Massachusetts State Senator

Cindy Friedman was elected to the Massachusetts Senate on July 25, 2017, to represent the Fourth Middlesex District, which includes Arlington, Billerica, Burlington, Woburn, and precincts 1-2 and 4-7 of Lexington. Prior to becoming a state Senator, Cindy worked as a public school teacher, an executive in the high-tech industry, and later served for nearly a decade as chief of staff to the late Senator Ken Donnelly.

Matthew Gorzkowicz, Secretary of the Executive Office for Administration and Finance

Matthew Gorzkowicz is the Secretary of the Executive Office for Administration and Finance. He has more than 25 years of experience in state finance and budgeting in the Commonwealth. He has served as the Associate Vice President for Administration and Finance at the University of Massachusetts President's Office for more than a decade, where he has had a direct role in setting the University's long-range administrative and financial goals and managed the development of an annual operating budget of $3.8 billion. Prior to UMass, Secretary Gorzkowicz worked in the Massachusetts Senate, the Department of Mental Health, the School Building Authority, and the Executive Office for Administration and Finance under Governor Deval Patrick, where he served as Assistant Secretary for Budget and then Undersecretary. He is a graduate of Northeastern University and lives in Winthrop, MA, with his wife and two children.

Ashley Groffenberger, Chief Financial Officer at the City of Boston

Ashley Groffenberger was appointed Chief Financial Officer (CFO) and Collector-Treasurer for the City of Boston in August 2022. In this role, Groffenberger is responsible for all aspects of financial management to support the long-term growth and stability of the City of Boston, including debt and investment management, financial reporting, budget development and oversight, tax administration, and citywide procurement. Groffenberger has over a decade of experience leading multi-billion-dollar state and local budgets. Prior to joining the Wu Administration, Groffenberger served as the Budget Director for the City and County of San Francisco. Before that, she served in both the House and Senate Committees on Ways and Means in the Massachusetts State Legislature.

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