

ACCOUNTING

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PLAYTIME 6:00 – OR, READ THE TRANSCRIPT BELOW)

PODCAST EPISODE #7: WHO IS DEAN ZERBE AND WHY IS THIS “WASHINGTON INSIDER” COMING TO LANCASTER? INTERVIEW WITH JEFF BLEACHER, RBF MANAGING PARTNER TRANSCRIPT

Kae Wagner – Jeff Bleacher, Managing Partner of Ross Buehler Falk is with us, and Jeff you have a really significant event coming up in September. Why don't you tell us about that?

Jeff Bleacher – We're having what we're calling a "September Showcase Event" which is really our bi-monthly Executive Forum and we're very excited. We've got two outstanding speakers coming. This event will take place **Tuesday, September 19 from 8 AM to 11 AM at Lancaster Country Club**. Our first speaker will be Dean Zerbe, the National Managing Director of the alliantgroup. He will give us **"From-the-Hill: Up-to-the minute Legislative Updates Affecting American Businesses."** The alliantgroup helps companies with specialty tax services. Our other speaker will be Scott Fiore. He's a Vice President and Partner at Tri-Starr Staffing and his topic will be **"Recruiting and Retaining Employees in a Tight Labor Market."** It's so important today to maintain employees. I find that with my clients, the challenges, how does it impact our culture? What are some strategies to retain employees using compensation or other benefit packages? So we think we have a great Showcase and we're looking forward to it.

Kae Wagner – I'm very excited to hear Dean Zerbe and I know that you've heard him speak as well. He's considered a "Washington insider." And you heard him speak last fall. Tell us a little bit about him.

Jeff Bleacher – Dean Zerbe is a Managing Director of the alliantgroup, as I mentioned earlier. I had the pleasure of hearing him speak in a panel and speak individually in Houston last year. Very engaging individual, very inside in Washington. I heard him speak right after the election last year. When I heard him speak he had just gotten off the phone with Speaker Ryan and Nancy Pelosi's PAC staff, and really got up to date, what's going on with tax legislation, Trump winning the election, what impact would that have

and he actually got into what Donald Trump's tax plans were and how it would impact us and our clients. He was just fantastic.

Kae Wagner – So in addition to the work that he does on the Hill, he's also a contributor to Forbes and I know that you have his bio, I think as he has it written for Forbes, which really shows a lot of his character. Do you want to read that to us?

Jeff Bleacher – I sure will. Dean is a regular contributor to Forbes magazine, very inside in Washington; works with the Senate. And I'm just going to read his full bio from Forbes magazine because I think this gives you a real insight to Dean. *"After I wake up, feed my yellow lab and check the Internet for updates on Nebraska football, I do two things: 1) help small and medium business owners (especially manufacturers, architects, engineers, computer software and agriculture) keep more of their tax dollars as National Managing Director for the alliantgroup; 2) help whistleblowers who want to speak out about fraud involving taxes and government spending at my law firm ZFFJ. My hope is to comment on tax policy, cutting through the headlines to give business owners a clear sense of what is really going on in Washington, DC. I draw on nearly 18 years of government service – including 8 years as Tax Counsel for the Senate Finance Committee when we passed some of the largest tax bills in the history of the country. I try to highlight tax laws and regulations – and especially overlooked provisions that can benefit business owners or have an unexpected bite. That I am the only person who has both a BFA in Film Production and an LL.M in Tax from NYU (as well as a JD from George Mason) hopefully comes through in my writing as I try to overcome one of my greatest writing challenges – bringing humor to tax."*

Kae Wagner – So it sounds like he has a very humorous approach as well as really knowing what's going on on the Hill.

Jeff Bleacher – He does. He's very engaging, very funny, but he really has inside knowledge of what's going on in Washington. Not only just with taxes, but other legislation, maybe health care and other related topics which I'm sure he'll cover. His session is actually titled **"From the Hill: Up-to-the-minute Legislative Updates affecting American Businesses."**

Kae Wagner – So give us the dates, the times and the locations again just to let everyone know we'll be sending out registration forms. It is a free session, but just give us those details once again.

Jeff Bleacher – It's **Tuesday, September 19 from 8 AM to 11 AM at Lancaster Country Club.** Really wish and hope you can attend. I think we've got a great session.

Kae Wagner – And we will be doing an interview on a podcast with Scott Fiore who also is speaking that day and that will be our next podcast after this one. Jeff, I'm looking forward to the session. Can't wait to meet Dean Zerbe and I hope that all of our listeners attend and also pass the word.

Jeff Bleacher – Absolutely. Please share. We'd definitely like to have as many people attend; especially small and medium-size business owners, I think, will really benefit from his conversation.

Kae Wagner – Okay, great. Well, I will talk with you soon, Jeff and enjoy your afternoon.

Jeff Bleacher – Thank you. Good talking with you, Kae.