



Upcoming Webinars and Conferences

Digital Asset Webinar
July 10, 2026
Noon-1:00pm

TEI-SJSU High Tech Tax Institute
November 2-3, 2026

4th Annual Blockchain Tax
Conference
January 29, 2027

For more information, visit
www.sjsu.edu/taxinstitute

Tell your colleagues about our
upcoming Certificate in Tax
Practice information sessions.

All sessions will be
conducted via Zoom.

For more information, and to
register, refer them to:

www.sjsu.edu/lucasgsb/events.php

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@sjsutax

Accounting grads working in tax:
Gain crucial tax research skills in
this fall's SJSU Tax Research
course. Begins August 20 online.
For details, contact Professor
Nellen at
annette.nellen@sjsu.edu

MST FACULTY & STAFF NEWS



On March 27 and 28, students from the SJSU Chapter of Beta Alpha Psi, along with co-Faculty Advisors Joel Busch (MST Faculty and '95 MST Alumnus) and Ben Anderson co-hosted a spectacular Midyear BAP Conference in San Jose with 285 Beta Alpha Psi students and faculty advisors from all across the country in attendance.



Professor Caroline Chen reports another successful filing season with many SJSU accounting students helping through Tax Aid. Professor Chen notes: "This work matters – for our clients and for our students. Tax preparation isn't just about forms and filings; it's about people helping people, learning by doing, and using education to make a meaningful difference. During the filing season, I was honored to work alongside [Tax-Aid](#)'s dedicated professional volunteers and my incredible students."

Professor Caroline Chen was elected Chair, Committee on Committees/Associate Vice Chair of the SJSU Academic Senate for 2026/2027.

Professor Annette Nellen's article, "Defying Science - Our Amazing (and Troubled) Tax Laws," was [published](#) in *Tax Notes State* in January 2026. You can read her April 2026 [article](#) in *The Conversation* on tax law changes for gig workers. At the May 2026 ABA Tax Section meeting in Washington, DC, Annette presented on three panels covering the history of tax policy, the future of collections, and the legal and ethical boundaries of data privacy in tax practice. Annette completes her two-year term chairing the ABA Tax Section's Tax Policy & Simplification Committee on July 1 and will start a 3-year term as council director for the Taxation Section. She continues her work on the AICPA SALT Committee and chairing the Digital Asset Tax Task Force.

UPCOMING TAX CONFERENCES

Digital Asset Webinar

Digital Asset Webinar on July 10, 2026 from noon - 1 pm - Tax Changes Proposed by the Bipartisan Digital Asset PARITY Act.

This webinar is free and California attorneys and CPAs, as well as Enrolled Agents can earn one hour of continuing education credit.

Presenters: Sean McElroy, Partner - Fenwick; Annette Nellen, Professor - SJSU Tax Program; and Yu Ting Wang, CPA, MST, Partner - Dello PC (and SJSU MST alum)

Register for free: <https://www.sjsu.edu/taxinstitute/webinars.php>

42nd Annual TEI-SJSU High Tech Tax Institute

The 2026 institute takes place on November 2 - 3 in Palo Alto. Topics include international tax developments, side-by-side, tariffs, M&A in the tech space, AI considerations in transfer pricing, AI legal considerations, taxing digital services, federal controversy and more. Keynote presenters: Michael Desmond of Miller & Chevalier and former IRS Chief Counsel; and a tax technology trends discussion with Alpa Lally, Chief Product Officer with Grant Thornton; Richard Cimino, Partner, Tax Ignition with KPMG; and Nikki Flom, Tax Director with Meta and incoming President of the Silicon Valley TEI Chapter.

Register: <https://www.sjsu.edu/taxinstitute/conference-details/registration.php>

4th Annual Blockchain Tax Conference

Mark your calendar for January 29, 2027 for this amazing event to be held in Santa Clara.

Register: <https://www.sjsu.edu/taxinstitute/conference-details/registration.php>

MST FACULTY & STAFF NEWS, CONT.

Congratulations to Cathy Daugherty who was recognized with the SJSU Staff Distinguished Service Award this spring. Cathy retired after serving over 20 years at SJSU in athletics and the College of Business. Cathy has been instrumental in helping MST students move from admissions to graduation offering encouragement and support all along the way. Cathy - thank you for your many years of outstanding service. We'll miss you. We are fortunate that Cathy will continue to work for the Tax Institute supporting our conferences and webinars.

Staff Distinguished Service Award

Presented by Acting VP Chris Wissella

Honorable Mentions:

Elena Seto, Library Resource Management and Delivery

Christine Marie Holmes, Library Resource Management and Delivery



Catherine Dougherty
Business Graduate Program
Specialist
Lucas College and Graduate
School of Business

Catherine Dougherty has worked at San José State for more than 20 years supporting graduate programs in the Lucas College and Graduate School of Business. She earned two bachelor's degrees and a master's degree from SJSU and was a student-athlete during her undergraduate years. Her work supports graduate students from admission through graduation.

"It's truly an honor to receive this recognition," she says. "I've been fortunate to work with wonderful colleagues from all across campus and with amazing students at San José State University, and I enjoy helping students navigate their path through graduate school."

"I enjoy helping students navigate their path through graduate school."



MST ALUMNI NEWS

Congratulations to Nisha Golcha, Partner at GHJ CPAs, named a [Trailblazer nominee](#) in CalCPA's Women to Watch Program.

CERTIFICATE IN ADVANCED TAX PRACTICE

Please help us promote our 3-course **Certificate in Advanced Tax Practice**.

The classes: Tax Research, Taxation of Business Entities, and Taxation of Property Transactions. These courses will help set a strong foundation for a career in tax and greater advancement opportunities.

This certificate program is now offered as an online format with occasional optional sessions on campus.

For more information visit

<https://www.sjsu.edu/lucasgsb/prospective-students/advanced-certificates/tax->

MST students and alums:

Have news to share with others? Please send details to

catherine.dougherty@sjsu.edu

ALUMNI NEWS, CONT.

Sara Sun



Sara Sun, CPA, is a Tax Manager at Robinhood, where she focuses on tax provision and planning. After graduating from San Jose State University's MST program in 2018, Sara joined PwC, where she began her tax career and built a strong foundation in corporate tax, tax accounting, compliance, and advisory work. In 2025, she moved to Robinhood, bringing her public accounting experience into an in-house tax role in the financial technology industry.

During her time in the MST program, Sara was actively involved in *The Contemporary Tax Journal*, SJSU's student-managed tax journal. She served as Student Editor, an experience she describes as one of the highlights of her MST journey. The journal gave her the opportunity to strengthen her technical writing, deepen her tax research skills, and collaborate with classmates, faculty, and tax professionals. Sara also authored an article for the journal on the Tax Cuts and Jobs Act's capitalization requirement for research and experimental expenditures.

Reflecting on why she pursued the MST degree, Sara says she wanted to build a deeper and more practical understanding of tax law while preparing for a long-term career in the tax profession. The MST program gave her the technical foundation, analytical mindset, and research discipline needed to navigate complex tax issues in practice. Just as importantly, it helped her develop confidence in reading tax authority, communicating conclusions clearly, and continuing to learn as tax law evolves.

"The MST degree was invaluable to me," Sara says. "It gave me a strong technical foundation, but it also taught me how to think like a tax professional. Tax is constantly changing, so the ability to research, analyze, and explain tax issues is just as important as knowing the rules themselves."

Sara also credits her experience with *The Contemporary Tax Journal* as an important part of her professional growth. Serving as Student Editor helped her appreciate the importance of clear writing and careful analysis - skills that continue to be essential in her current tax provision role. "The journal was an invaluable experience. It pushed me to be precise, organized, and thoughtful in how I approached tax topics. Those skills have stayed with me throughout my career."

Sara's advice to current MST students is to take full advantage of the program beyond the classroom. She encourages students to be curious, participate actively, and build relationships with classmates and instructors.

"Do not just focus on completing the degree - use the MST program as a place to build your professional foundation," Sara says. "Get to know your classmates, ask questions, volunteer for opportunities like the Tax Journal, and practice writing and communicating clearly. Technical knowledge is important, but your ability to keep learning, collaborate with others, and explain complex issues in a practical way will make a lasting difference in your career."

Sara also encourages students to stay open-minded about where a tax career can lead. "There are many paths in tax, from public accounting to industry and beyond. My experience at PwC gave me a broad and rigorous foundation, and my current role at Robinhood has allowed me to apply that experience in a dynamic corporate environment. The MST gives you the tools to grow across different stages of your tax career. Stay curious, keep learning, and do not underestimate the value of the relationships you build along the way."
