



Upcoming Webinars and Conferences

TEI-SJSU High Tech Tax Institute
November 3 - 4, 2025

3rd Annual Blockchain Tax
Conference
January 30, 2026

We will soon announce the date
a 1-hour summer digital asset
tax update webinar.

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

Connect with us:



<http://bit.ly/3OEKpEN>



@sjsutax

Individuals eligible to enroll in
the MST Program or who already
have an MST may take courses via
Open University.

To learn more, visit:
<https://bit.ly/sjsumstopenu>

MST FACULTY NEWS

Professor Caroline Chen was awarded the 2024 Lucas
College of Business Distinguished Faculty Service Award.
Congratulations Caroline!

Pictured: Professor Chen receiving the award on May 13,
2025 at SJSU shown with Dean Priya Kannan (l) and
Associate Dean Meg Virick (r).



Annette Nellen was appointed to the AICPA Tax Division's State and Local Tax Committee for a 3-year appointment starting in May 2025. She also continues to chair the AICPA Digital Asset Tax Task Force and serves on the AICPA Disaster Relief Task Force and the Federal Tax Reform Tax Advisory Group. She is a former chair of the AICPA Tax Executive Committee. Nellen's article "Lessons From California's IRC Section 1031 Conformity Approach," was published in Tax Notes State, April 7, 2025, and "Overlooked Considerations That Could Improve Tax Systems," Tax Notes State, was published January 6, 2025. "Modernization Is Needed for §197 Intangible Asset Amortization," was published in Tax Management Memorandum, Bloomberg Tax, in February 2025. At the February ABA Tax Section meeting, Nellen presented on a panel, Tax Technologies & Access to Justice – What Can the Latest and Greatest Technologies Do to Assist Unrepresented and Low-Income Taxpayers?, with Amy Spivey, UC Law San Francisco. Annette was also awarded the Lori and Alan Kessler Endowed Professorship by the SJSU Lucas College and Graduate School of Business.

Cathy Dougherty was recognized this spring by San Jose State for her exemplary 20 years of service to SJSU.

Generative AI and Tax

If you have used any GenAI tool to help with tax research, you likely discovered it is not anywhere near as good as someone who has completed SJSU's BUS 223A, Tax Research and Decision-making course. But GenAI is here to stay and can serve useful and time-saving purposes if people know how it works and its limitations. A GenAI component will be added to BUS 223A starting this fall to be sure grad tax students understand how it works, how to best write prompts, ethical limitations, and why knowing how to find, interpret and apply primary tax authorities is even more crucial for competent tax practice and avoiding errors and malpractice.

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.

For more information visit

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

MST STUDENT NEWS

Natalie Nguyen (now an MST alum) was awarded the Sanford Miller Scholarship for Excellence in Advanced Corporate Taxation in Fall 2024.

Qi (Cecily) Cao was awarded the Scholarship for Outstanding Achievement in Tax Research and Writing in Fall 2024.

Congratulations Natalie and Cecily for your outstanding achievements in the MST Program!

ALUMNI NEWS

Daniel Currie



Daniel Currie, CPA, EA, MST, a Partner at Hillberg & Company CPAs, leads the firm's tax department with a focus on serving small business clients. He specializes in taxation for passthrough entities and individuals. His background while working at a small-sized firm in public accounting for over 18 years, has allowed him to gain well-roundedness in dealing with a wide-range of tax services for clients. Daniel enjoys learning about each client's unique tax and accounting needs and their business and financial goals. He takes pride in being an excellent listener to each client's story and partnering with them as a member of their team. Daniel values a team-approach with clients and colleagues because he finds success is often achieved through a collective effort of strengths and the synergy of the group. Daniel's biggest strength is his ability to teach others. He highlights this strength by effectively communicating and providing opportunity for his clients and colleagues to learn how certain tax rules and tax law apply to a set of narrow and unique client situations. His technique of gaining clarity for specific circumstances allows him to provide strategic tax planning and necessary due diligence for proper tax compliance.

Before Daniel achieved his Masters in Tax at SJSU, he graduated from CSU Stanislaus with a degree in Business, concentration in Accounting. Daniel is proud to be an alum from two of the CSUs! Daniel is a Certified Public Accountant (CPA) and Enrolled Agent (EA).

Daniel's advice for MST students: Take advantage of the classroom experience, learning and connecting with classmates because the relationships you form with clients and colleagues are the key ingredient to success in accomplishing your goals together. Daniel says he gravitated to the MST program at SJSU, despite having a long commute from the Central Valley, because of the opportunity to learn inside a classroom setting which allowed him to be more engaged in learning from instructors and fellow classmates.

Daniel suggests being thorough in your studying and reading in the MST materials because this is the same underpinning that develops strong research and preparedness in your working career. You quickly learn in tax, that it is just as important to read the exceptions (and exceptions to the exceptions) as it is to understand the general rules to tax law.

"Find a way that works for you to learn the subjects in the classroom and stay consistent. I found that it was helpful for me to organize all of the class materials in a binder, along with my notes, examples, and other resources I found. By organizing information in a central location, it not only allowed me to have valuable reference material, but the act of organizing allowed my mind to better understand the nature and interaction of certain tax rules and important tax principles."

Daniel also recommends embracing the art of learning while pursuing your MST degree, both in the classroom and outside because if you find in your career what he found in his, the passion for being a life-long learner establishes an unrelenting mindset of growth and advancement.

MST students and alums:

Have news to share with others? Please send details to
catherine.dougherty@sjsu.edu
