

# TriTech Services

## Organizational Team

TriTech Services is a U.S. based company, headquartered in Texas. Our management team is comprised of tax and technology veterans who take an active interest in the ever-changing tax laws of the insurance industry. Our mission is to offer quality tax processing services to insurance professionals at significantly lower costs in a highly secure environment. Our staff serves as a virtual extension of your office - we are always just a click or a phone call away.

### Robert A. Sartori

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Bob is the Vice President of TriTech Services Consulting Practice. Bob leads the National Consulting Practice for TriTech Services and is responsible for oversight of all the TriTech Services Consulting Accounts. Prior to joining TriTech, Bob was a Tax Manager for Prudential Financial. He has been responsible for the oversight of insurance state and local premium taxes, including tax planning, compliance and state audits. Bob's experience consists of over 23 years of insurance company state and local taxes. He has had state insurance tax exposure in both the Life and Property & Casualty industries through working for companies like Chubb Insurance Co. and Crum & Forster Insurance Co. Bob is a frequent panelist and speaker at multiple insurance industry conferences.

### Christopher Hertzog

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Chris has been with TriTech for 6 years. Chris Hertzog has a BBA in Accounting from Midwestern State University and is a CPA. He owned and operated his own Small Business Tax Preparation Firm before working for TriTech Software. He has worked as a product Developer, Tester, and Manager of the Quality Assurance Team. He is currently the Manager of Tax Compliance with TriTech Services.

### Christine Gustafson

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Christine, a multi-discipline tax lawyer and recognized authority on state tax matters, serves as a Consultant to TriTech Services by assisting with state and local tax and legal matters. Possessing a very strong technical and accounting background, she has over 20 years of state and local tax experience. Chris graduated from DePaul University with a J.D. with emphasis in taxation. She has since worked for companies such as Allstate, Ernst & Young, and Foley & Lardner. Currently, she is the owner and practitioner of C. Gustafson Law, providing tax counseling, consulting, and compliance services. Chris has also published Lexis-Nexis Insights and she is an Illinois Certified Mediator, working pro bono juvenile cases.

### John Wagner

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John Wagner, a well-known tax professional, is one of the leading voices in the insurance industry. John is a key consultant and final reviewer of premium tax returns for TriTech's Tax Services Division.

John has over 42 years of experience and is a wealth of premium tax knowledge. John graduated from DePaul University with an MBA in 1974. He was with CNA Insurance Companies for over 37 years, the last 16 years spent as the Assistant Vice President of Premium Tax and has spent the last 5 years preparing premium taxes for CastlePoint National Insurance Company, a member of the Tower Group. For more than a decade, Wagner has served as a Steering Committee Member of the National Premium Tax Conference.

## Robert P. Fruh

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Robert P. Fruh's career has been devoted to the financial services industry, and he now puts his knowledge to work for TriTech Services. Mr. Fruh began his career in the financial reporting department of the Bank of New York. He transferred to the bank's tax department after getting his MBA in taxation. After six years, Mr. Fruh moved to the tax department of Crum and Forster. He worked in tax return preparation, research, and planning for both federal and state tax issues, focusing primarily on income taxes.

Mr. Fruh later joined Ambac Financial Group as an assistant vice president. He was responsible for preparing the consolidated federal income tax return and all state tax compliance, as well as federal and state tax provisions. He also became versed in premium taxes and handled research and planning as well as compliance.

## Mary Caputo

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Mary Caputo brings 35 years of state insurance tax experience to our Services & Consulting Practice. She has been in the insurance game at multiple levels, including assisting in the development of state tax legislation in numerous jurisdictions and speaking at various insurance industry conferences.

Caputo graduated from Central Connecticut State University. She has been a member of American Insurance Association's State and Local Tax Subcommittee for over 20 years, serving as Chair for two two-year terms. She recently retired as Assistant Vice President of State and Local Taxes at The Hartford Financial Services Group after 28 plus years, and she now lends her expertise to TriTech Services.

## Kristin Owen

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Kristin Owen is the lead account supervisor at TriTech Services under Christopher Hertzog, and assists in overseeing all aspects of the tax processing division. She is also responsible for individual client account management, tax compliance, and the preparation and review of returns. She received her Bachelor's degree from The University of North Texas, and has over 10 years of tax management and preparation experience. Kristin joined the TriTech team in 2007.

## Joyce Voyles

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Joyce Voyles received her BS degree from Southern Illinois University of Edwardsville, Illinois in 1975. She started working in the Insurance Industry in 1980 as a Financial Accountant, moved over to Premium Tax Accountant in 1981. In 2006 she started to work at TriTech Services as Tax Processor. She holds the position of Tax Services Account lead and is primarily responsible for client account management, tax compliance, and the preparation and review of returns.

## Lin He

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As a tax services account supervisor, Lin He is mainly responsible for communicating with clients, contacting states, and overseeing processors' work. She joined TriTech in 2005 after receiving a MS degree in Information System from the University of Texas at Arlington. While working at TriTech, she also earned her Master degree in accounting from the same school in 2007.

### More Information:

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1205 S. Greenville Ave.  
Allen, TX 75002