

2025 Midyear Conference

Grand Hyatt Washington, DC

March 16-19, 2025

Program At A Glance

Sunday, March 16, 2025

9:00 AM - 11:30 AM	Executive Committee Meeting
11:30 AM - 1:00 PM	Executive Committee and Past International Presidents Luncheon
1:00 PM - 4:00 PM	Board of Directors Meeting
4:00 PM - 5:00 PM	Roundtables (TLD, FED, IRSAA/CAP, SALT, INTL)
5:30 PM - 6:30 pm	First Time Registrant, New TEI Member and Non-Member Meet & Greet
6:30 PM - 7:30 PM	Welcome Reception
7:30 PM - 9:30 PM	Past International Presidents Dinner

Monday, March 17, 2025

	8:00 AM - 8:20 AM	Welcome/Opening Remarks
CTO/ FED/ INTL	8:30 AM - 9:30 AM	Tax Policy in 2025
	9:30 AM - 9:45 AM	Break
TECH	9:45 AM - 11:00 AM	The Future of Tax: Leveraging AI for Corporate Tax Strategy
	11:00 AM - 11:15 AM	Break
	11:15 AM - 12:15 PM	Breakout Sessions
INTL		The Proposed PTEP Regulations: Finally!
FED		Corporate Hot Topics, including CAMT and 355
SALT		State Corporate Income Tax in 2025: Key Trends and Implications
IRSAA		IRS Dispute Resolution Tools: What's New, What's Working, and What's Not
	12:15 PM - 1:45 PM	Lunch/Chapter Leaders Lunch
	1:45 PM - 2:45 PM	Breakout Sessions
INTL/TLD		International Tax Regulatory Update: Final DCL/DPL, 987, and Cloud Regulations
FED/IRSAA		Expanded Use of the Economic Substance Doctrine
SALT		SALT Legislative Update: Navigating the Twists and Turns of State Tax Trends
FED		Credit Marketplace Update

TRACK DESIGNATIONS: Educational tracks are identified throughout the program as follows:

TLD - Tax Leadership & Development
CTO - Chief Tax Officer

FED - Federal Tax
FIN - Financial Reporting

IRSAA - IRS Administrative Affairs
INTL - International Tax

TECH - Tax Technology
SALT - State & Local Tax
CAN - Canada

KEY:  ROUNDTABLE
 ACCOUNTING CREDIT

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Monday, March 17, 2025 (Cont.)

	2:45 PM - 3:00 PM	Break
	3:00 PM - 4:00 PM	Breakout Sessions
INTL		Entering New Markets: Top Direct and Indirect Tax Issues for U.S. Multinationals
FED		Dealing with Debt in 2025
TECH		Modernizing Tax Workflows: Automation and Optimization Strategies
SALT		Market-Based Sourcing: State Tax Tales and Tribulations
	4:00 PM - 4:30 PM	Sponsor Networking Break
	4:30 PM - 5:30 PM	Breakout Sessions
INTL		Mobile Employees: International Issues
FED/IRSAA		Accounting Method Considerations
SALT/TECH		State Tax Compliance: Riding the Wave of Tech Trends
FED		Cryptocurrencies and Digital Assets: Tax Implications for Businesses and Investors
	6:30 PM - 11:00 PM	Sponsor Parties/Events

Tuesday, March 18, 2025

	8:00 AM - 8:15 AM	Welcome Back & TEI Award Presentation
IRSAA	8:15 AM - 9:30 AM	Tax Administration & Compliance in the New Administration
	9:30 AM - 9:45 AM	Break
	9:45 AM - 10:45 AM	Breakout Sessions
INTL		Geopolitics, Customs, and Supply Chains
FED		Partnership Primer
TECH		Transforming Tax Processes with Automation and Data Management
SALT		Audits and Litigation in SALT: Top Emerging Trends
	10:45 AM - 11:00 AM	Break
	11:00 AM - 12:00 PM	Breakout Sessions
INTL		OECD Pillar Two for Passthrough Entities
FED		Managing Risk and Other Challenges in Credit Transactions ^A
FIN		Financial Reporting Considerations of Tax Reform Proposals, Including ETR Impacts
SALT		Unlocking Opportunities: The Latest in State and Local Tax Incentives
	12:00 PM - 1:30 PM	General Lunch/CTO Lunch/Small, Medium, and Large Tax Department Networking Session
	1:30 PM - 2:30 PM	Breakout Sessions
INTL		Challenges with Withholding Taxes, Systems, Processes, and Refunds
FED		Acquisition Considerations, including Section 382
TLD		How to Make Sense of (and Navigate) Your Co-Workers and Tax Teams
FED		Energy Credit Transfers: Experiences from a Developing Market

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Tuesday, March 18, 2025 (Cont.)

	2:30 PM - 2:45 PM	Break
	2:45 PM - 3:45 PM	Breakout Sessions
FIN/TECH		Implementing the New Rate Reconciliation Disclosures Under ASU 2023-09, Including Automation Opportunities A
FED		The Current State of R&D
TLD		How Be a Resilient and Effective Leader in Face of Audits, Provisions, and Compliance
INTL		Indirect Tax Developments in Canada, Mexico, and Brazil
	3:45 PM - 4:15 PM	Sponsor Networking Break
	4:15 PM - 5:15 PM	Breakout Sessions
INTL		Public CbC Reporting: The Latest Around the World
FED		R&D Controversy
SALT		SALT Income Tax Sourcing vs. Indirect Tax Sourcing: Key Differences and Implications
IRSAA		The BBA Partnership Audit Regime: Tricks, Traps, and Unintended Consequences
	6:30 PM - 9:30 PM	TEI Grand Reception

Wednesday, March 19, 2025

	7:30 AM - 8:30 AM	Thomson Reuters Advisory Boards
	8:30 AM - 9:30 AM	Breakout Sessions
INTL		OECD Pillar Two: Update and What Should U.S. Multinationals Do?
IRSAA		Tax Controversy Hot Topics
SALT		State Tax Complexities in Intercompany Debt and Other Transactions: Best Practices
	9:30 AM - 9:45 AM	Break
	9:45 AM - 10:45 AM	Breakout Sessions
IRSAA		Managing Transfer Pricing Exposures: Lessons Learned from Recent Cases and Penalty Assertions
FED		M&A Maze: Let Tax Insurance Be Your Compass
	10:45 AM - 11:00 AM	Break
TLD	11:00 AM - 12:15 PM	Composition of the Modern Tax Department: Hiring Trends & Changing Skills

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ELIGIBILITY TO ATTEND: Registration is open to TEI members and other in-house tax professionals. Individuals engaged in private law, accounting, or other consulting practice are ineligible to attend.

REGISTRATION FEES

TEI is offering an early registration discount to members and non-members whose registrations and payments are received by TEI by February 21, 2025.

FEES	EARLY (EXPIRE ON 2/21/25)	REGULAR (BEGINS ON 2/22/25)
First-Time Member	\$995	\$1,095
Member	\$1,195	\$1,295
Non-Member	\$1,450	\$1,595
Member-in-Transition & Early Member Emeritus	\$995	\$1,095

REGISTRATION PROCEDURE: Please register online at <https://25my.tei.org/25my/> or send the completed registration form to TEI with your registration fee. Checks should be made payable to Tax Executives Institute, Inc. All payments must be in U.S. dollars. A registration form will not be processed unless accompanied by payment.

Because of TEI's lockbox procedures, registrations should not be sent to TEI's street address.

By Web: Go to <https://25my.tei.org/25my/>

By Email: meetings@tei.org

By Mail and USPS Express Mail: Send registration form with check or credit card information (VISA, MasterCard, American Express, and Discover accepted) to Tax Executives Institute, Lockbox 9407, PO Box 70280, Philadelphia, PA 19176-0280.

By Fax: (202) 638-5607. Credit card registrations only.

Registration fees cover the following conference events: a welcome reception on Sunday; continental breakfast, breaks, and lunch on Monday; continental breakfast, breaks, lunch, and an evening reception on Tuesday; continental breakfast and breaks on Wednesday; and digital copies of all conference materials. After your registration has been processed, you will receive a confirmation and a receipt via email within two business days. (If you don't see it in your inbox, check your spam filter or send us an email at meetings@tei.org.)

TEAM DISCOUNT: As a special incentive for companies to send multiple attendees to the conference, a 20% discount will apply for the second (and all subsequent) full conference registrants from your company. In order to take advantage of this discount, the second and subsequent registrants must put in "MY25TEAM" into the discount code field during registration. The first registrant should not put in the discount code.

* Every participant in the team discount must register for a full conference member or non-member rate.

**Discounts may not be combined. You may not take the discounted First Timer Rate and also take the TEAM Discount. However, a First Timer may count as your first full registrant from your organization to earn the other attendees from your company the discount.

FINANCIAL AID FOR ILLINOIS LICENSED ATTORNEYS: Scholarships to defray tuition expense for this program are available for in-house tax professionals (both TEI members and nonmembers) who are temporarily unemployed and who are Illinois licensed attorneys with a demonstrated financial hardship. Scholarships will be reviewed and provided upon application on a case-by-case basis. Attorneys who qualify will receive at least a 50% reduction in the conference fee (which does not include any reduction or reimbursement for meals, lodging, or travel costs associated with the conference). To request information on whether you might qualify, please contact us at meetings@tei.org.

CONFERENCE PARTICIPATION: Conference name badges will be required for admission to all education sessions. A full conference registration cannot be split between registrants. Registrants are encouraged to visit exhibits hosted by TEI's conference sponsors, whose financial support enables the Institute to pursue its educational, networking, and advocacy goals without raising program fees or dues. Registrants should know that by entering drawings held by the sponsors, they are consenting to being contacted by the firms. In addition, TEI grants a one-time license to conference sponsors to contact registrants before and after the conference. Registrants wishing to have their names removed from the list provided to sponsors should email meetings@tei.org or write the word "remove" on the back of their business card and drop it off at the TEI Registration Desk.

Questions about TEI's sponsorship program should be directed to asturdevant@tei.org. Sponsors are not permitted to attend any educational sessions.

CONFERENCE HANDOUT MATERIALS: Conference materials (e.g., session handouts, presentation slides) will be posted on the virtual conference platform. TEI encourages you to download or print documents of interest in advance. All materials will remain accessible to registrants for at least three months after the conference on the conference website.

CONFERENCE PROGRAM: The conference program is subject to change. Please check the interactive program on <https://25my.tei.org/25my/> for the most up-to-date schedule of events.

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CPE CREDIT INFORMATION: Tax Executives Institute is registered with the National Association of State Boards of Accountancy as a sponsor of "group live" and Group Internet Based continuing professional education on the National Registry of CPE Sponsors (registry number 103086). State boards of accountancy have final authority on the acceptance of individual courses. Complaints regarding sponsors may be addressed to National Registry of CPE Sponsors, 150 Fourth Avenue North, Ste. 700, Nashville, TN 37219-2417. Website: www.nasba.org. For more information regarding administrative policies such as complaint and refund, call TEI at (202) 638-5601.

Date: March 16-19, 2025 Delivery Method: Group Live
Prerequisites: None Program Level: Overview
Fields of Study: Taxes Advanced Preparation: No advanced preparation required

LEARNING OBJECTIVES: To provide updates on legislative, regulatory, and judicial developments relating to international, indirect, and direct tax, corporate tax management and tax controversy, as well as to analyze the effect of financial reporting developments and tax technology on the effective operation for corporate tax departments.

CPE Credits possible: Approximately 17.0

CLE Credits possible: Approximately 14.0

Accounting Credits possible: 2.0

CPE/CLE requirements vary from jurisdiction to jurisdiction. TEI's educational programs are designed to meet NASBA standards and are generally accepted by CPE/CLE agencies across the United States. Registrants should check the rules in their own jurisdictions to ensure eligibility. TEI's 2025 Midyear Conference is co-sponsored by TEI Educational Fund, a qualified section 501(c)(3) organization.

HOTEL INFORMATION: A discounted block of sleeping rooms is being held at the **Grand Hyatt Washington Hotel** for TEI Midyear Conference Attendees. TEI's discounted sleeping room rate is \$359 + tax per night. Click [HERE](#) to make your reservations online. Do not attempt to call into the hotel directly, they will not be able to help you with a reservation under our block, all reservations must be made using our reservations link. **Our room block is limited and will likely sell out so do not delay in making your reservations.** Any unsold rooms in our block will go on sale to the general public on February 20.

HOTEL ADDRESS:

Grand Hyatt Washington Hotel
1000 H Street, NW
Washington, DC 20001
(p) 202.582.1234 (no call-in reservations will be taken for TEI's room block)

TRANSPORTATION INFORMATION:

The Grand Hyatt does not have shuttle service from any of the 3 Washington, D.C. area airports. The Grand Hyatt is approximately 4.0 miles from Reagan National Airport (DCA), 25.5 miles from Washington Dulles Airport (IAD), and 34.0 miles from Baltimore Washington Airport (BWI). Both National and Dulles Airports are now accessible via Washington's Metro Rail System.

COVID-19 PROTOCOLS: We are committed to fostering a safe and comfortable experience for those attending the Conference. All attendees must agree to comply with all COVID-19 safety protocols established by TEI and Grand Hyatt. For up-to-date information regarding these requirements, please visit: <https://24my.tei.org/24my/>

TEI's Updated COVID Policy: TEI's top priority is ensuring the health, safety, and well-being of our attendees. Participants must adhere to the COVID-19 guidelines published by the U.S. Centers for Disease Control and Prevention (CDC), as well as the state and local health authorities in the jurisdictions in which our events occur. Participants may not attend any TEI conference if they feel unwell, have tested positive for COVID-19 within 10 days before the event, or have been in contact with someone who has tested positive for COVID-19 within 10 days before the event. By registering for this event, attendees affirm their commitment to comply with TEI's in-person meeting guidelines.

Cancellation and Substitution Policy:

Cancellations made in writing by March 3, 2025 and will be subject to an administrative service charge of \$75 (USD); for cancellations after March 3 the charge will be \$200 (USD). No refunds will be made for cancellations received after March 10 or for no-shows. To cancel your registration, please send an email to meetings@tei.org.

SUBSTITUTIONS: There is a \$25 processing fee for each substitution, plus any registration fee difference. To request a substitution, please send an email to meetings@tei.org.

CANCELLATION OR OVER-SUBSCRIPTION OF THE CONFERENCE: In the event the conference must be canceled or is oversubscribed, TEI's liability is limited to the return of the registration fee.