



Virtual 77th Annual Conference - Simulive Edition | November 29 – December 7, 2022 | (10 bi-weekly sessions) | Virtual Seminar

Virtual 77th Annual Conference - Simulive Edition

PLANNING COMMITTEE:

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International President, TEI

Sandhya K. Edupuganty
Chair, Continuing Education
Committee and Senior Vice
President, TEI

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Executive Director, TEI

Patrick Evans
Chief Tax Counsel, TEI

Todd Lard
Tax Counsel, TEI

Ben Shreck
Tax Counsel, TEI

Although TEI's 77th Annual Conference has concluded – October 26 was the final day – TEI has hand-picked 10 sessions focused on U.S. federal, international, and state & local tax, and financial reporting for a virtual “**Simulive** edition” of this year's Annual Conference. These ten sessions represent the latest thinking and perspective on critical topics for in-house tax professionals.

We are airing these sessions in a **Simulive** format, which means we will replay the recorded sessions from the seminar and will have session speakers on hand to answer questions through chat and a live Q&A at the end of the session. Each **simulive** session will qualify for 1.0 CPE credit. **Simulive** 77th Annual Conference registrants will also receive on-demand access to the ten recorded sessions at the end of the **Simulive** seminar. Please note that CPE is not available for on-demand viewing of the sessions. TEI reserves the right to substitute live programming in place of the recorded session if the session content has been outdated or the recording is otherwise compromised.



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Time (ET)

Tuesday, November 29

11:00 am - 12:15 pm

FASB/Financial Reporting Update

Stephen Dunphy | VP, Tax Operations, Ross Stores, Inc. | **Moderator**

Damien Boudreau | US Tax Accounting Services Leader, PricewaterhouseCoopers LLP

Paul Vitola | Partner, Deloitte Tax LLP

1:00 - 2:15 pm

The Inflation Reduction Act's Book Minimum Tax

Eric Johnson | Senior Vice President of Tax, Ross Stores | **Moderator**

Jamie Brown | Partner, Ivins, Phillips & Barker, Chartered

Michael Lebovitz | Partner, Mayer Brown LLP

Heather Roush | Managing Director, Andersen Tax LLC

Wednesday, November 30

11:00 am - 12:15 pm

OECD/G20 BEPS Pillars One & Two – Where Are We and Will We Cross the Finish Line?

Josie Scalia | Head of Tax, Nestle Health Science (Treasurer, Tax Executives Institute) | **Moderator**

Quyen Huynh | Principal, KPMG LLP

Alison Lobb | Partner, Deloitte UK LLP

Will Morris | Deputy Global Tax Policy Leader, PwC

1:00 - 2:15 pm

OECD G20 BEPS Pillar Two Implementation – Holistic and Practical Issues

Sarah Winters | SVP, Chief Tax Officer & Global Treasurer, Cushman & Wakefield | **Moderator**

Rafic Barrage | Partner, Baker McKenzie LLP

Danielle Rolfes | Co-Leader - International Tax Group, KPMG LLP

Jason Yen | Principal, International Tax and Transaction Services, Ernst & Young LLP



Connect. Engage. Impact.

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Time (ET)

Thursday, December 1

11:00 am – 12:15 pm

Hybrid & Remote Workforce Issues – Corporate Income Tax Risks and Best Practices

Katrina Welch | North American Director of Tax, Gordon Food Service, Inc. | **Moderator**

Barton Bassett | Partner, Morgan, Lewis & Bockius LLP

Thomas Cryan | Partner, Ivins, Phillips & Barker, Chartered

Brian Kirkell | Principal – Washington National Tax, RSM US LLP

1:00 – 2:15 pm

Unpacking the Tax Treatment of Post-2021 R&E Expenditures Under Section 174 and Potential Implications Across the Return

Betty Mak | Senior Manager, Tax, Maxar Technologies Inc. (Vice Chair, TEI's Federal Tax Committee) | **Moderator**

Mark Hindes | Senior Manager, Deloitte Tax LLP

Hogan Humphries | Managing Director, KPMG LLP

Kathleen King | Managing Director and National R&D Practice Leader, Alvarez & Marsal Taxand, LLC

Tuesday, December 6

11:00 am – 12:15 pm

NOLs – The Most Valuable State Tax Assets You Only Think You Have

Natalie Friedman | Senior Manager, Tax, Charter Communications, Inc. (Chair, TEI's State & Local Tax Committee) | **Moderator**

Jessica Morgan | National Tax, Senior Manager, Ernst & Young LLP

Craig Fields | Partner, Blank Rome LLP

Charlie Kearns | Partner, Eversheds Sutherland (US) LLP

1:00 – 2:15 pm

The Worst SALT Decisions of the Year

Michell Rodriguez | Director, Corporate Income Tax, Costco | **Moderator**

Leah Robinson | State & Local Tax Partner, Mayer Brown LLP

Amy Nogid | Counsel, Alston & Bird LLP

Rebecca Balinskas | Of Counsel, Morrison & Foerster LLP



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Time (ET)

Wednesday December 7

11:00 am - 12:15 pm

Applying the New Foreign Tax Credit Regulations (Live Webinar)

Joe Calianno | Managing Director, Andersen

Matthew Jenner | Partner, Baker McKenzie LLP

Kenneth Murwanto | Senior Manager, International Tax, RSM US LLP

1:00 - 2:15 pm

The Fundamentals of Section 704(c) – Understanding Partnership Book
-Tax Differences

Sandhya Edupuganty | VP, Tax and Treasury, E2open, LLC
(Senior Vice President, Tax Executives Institute) | **Moderator**

Dan Carmody | Partner, Morgan, Lewis & Bockius LLP

Max Pakaluk | Managing Director, National Tax, Andersen



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GENERAL INFORMATION

Registration Fees

Simulive attendees may register for all 10 **Simulive** sessions (**Full Session Bundle**), or they may select individual sessions for purchase. Individual sessions are not eligible for discount.

	TEI Member	Non-Member
Full Session Bundle	\$495	\$650
Individual Sessions	\$100	\$150

Registrations

TEI Events are open to members of TEI and other in-house tax professionals. Individuals engaged in private law, accounting, or other consulting practices, as well as government employees, are ineligible to attend.

Format

These **Simulive** sessions were recorded at the 77th Annual Conference and will be re-aired with live subject matter experts to answer questions from registrants. There will be attendance popups throughout the sessions to ensure active participation.



By web:

<https://www.tei.org/events-education/events/77th-annual-conference-simulive-edition>
You must log in before registering.



By mail:

Send registration form with check or credit card information to Tax Executives Institute, Lockbox 9407
PO Box 70280, Philadelphia, PA 19176-0280.



By fax:

202.638.5607. Credit card registrations only.



By email:

Scan and send completed registration form with credit card information to meetings@tei.org.

Cancellation and Substitution Policy

All cancellations must be received in writing by November 25, 2022 at meetings@tei.org. Cancellations will be subject to a \$50 cancellation fee. There are no partial refunds if you can only attend some of the sessions. Substitutions may be made prior to the start of the series; however, there are no partial registrations or sharing of registration for CPE purposes. Substitutions requests should be emailed to meetings@tei.org and are subject to a \$25 fee.

TEI's liability is limited to the return of the registration fee.
TEI's Federal Taxpayer ID Number is 52-0239291.

If you have any questions or concerns leading up to the sessions, please contact meetings@tei.org.



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GENERAL INFORMATION - CONTINUED

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. To request information on whether you might qualify, please contact us at meetings@tei.org.

Questions?

Call TEI at 202.638.5601, email meetings@tei.org or visit www.tei.org. Click on "Events & Education."

CPE Credit Information

Tax Executives Institute Education Foundation is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of "Internet live" continuing professional education on the National Registry of CPE Sponsors.

Date

November 29 - December 7, 2022

Delivery Method

Internet Live

Program Level

Overview

Field of Study

Taxes

Prerequisite

None

Advanced Preparation

No advanced preparation required.

CPE Credit

Approximately 10.0 credits based on a 50-minute hour.

Disclaimers

State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. To submit a complaint about a specific program, speaker or content, please email meetings@tei.org. Complaints regarding sponsors may be addressed to National Registry of CPE Sponsors, 150 Fourth Avenue North, Ste. 700, Nashville, TN 37219-2417. Website: www.nasbaregistry.org





ELIGIBILITY

TEI events are open to members of TEI and other in-house tax professionals. Individuals engaged in private law, accounting, or other consulting practices, as well as government employees, are ineligible to attend.

REGISTRATION FEES (in U.S. \$)

FULL SESSION BUNDLE

\$495 Member

\$650 Non-Member

SELECT INDIVIDUAL SESSIONS

\$100 Member

\$150 Non-Member

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Update

The Inflation Reduction Act's
Book Minimum Tax

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Two – Where Are We and Will
We Cross the Finish Line?

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Hybrid & Remote Workforce
Issues – Corporate Income Tax
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Under Section 174

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Applying the New Foreign Tax
Credit Regulations

The Fundamentals of Section
704(c) – Understanding
Partnership Book-Tax
Differences

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REGISTRATION FORM

The registration fee covers course materials and other items specified in the seminar announcement. Applications will be accepted on a first-come, first-served basis. Registrants are encouraged to register via www.tei.org. Credit card registrations may be scanned and emailed to: meetings@tei.org. If registering by check, make checks payable to Tax Executives Institute and mail to Tax Executives Institute, Lockbox 9407 PO Box 70280, Philadelphia, PA 19176-0280. Do not mail registrations to TEI's street address. Questions? Call 202.638.5601 or email: meetings@tei.org.

Name

Company

Mailing Address

City

State/Province Zip/Zone

Telephone/Fax

Email

Charge to: VISA MasterCard American Express Discover Diners Club

Card Number

Exp. Date CVV

Cardholder Name (print)

Signature

