



1200 G Street NW, Suite 300  
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## TEI's Skills and Leadership Seminar FOR IN-HOUSE TAX PROFESSIONALS

### Sharpen your capabilities - become a more effective professional!

It's not just about "case, Code and reg" expertise anymore! To be effective, in-house tax professionals must also develop and maintain proficiency with a broad range of tools, skills, and capabilities to manage and process information efficiently, communicate effectively, and constructively interact with their teams, departments, and companies. TEI's two-day seminar is a "roll-up-your-sleeves," hands-on program to help you build and enhance the personal skills and competencies you need to be a more effective tax professional. Our program is designed around four tracks:

- ▶ **T** Tools
- ▶ **S** Communications Skills
- ▶ **M** Management Capabilities
- ▶ **PD** Professional Development

#### WEDNESDAY, JUNE 12

5:00 - 7:00 pm Registration Open

#### THURSDAY, JUNE 13

7:45 - 8:15 am Registration & Continental Breakfast

8:15 - 8:30 am Welcome, Introductions and Objectives — ***Taking A Personal Skills Inventory***  
Eli J. Dicker, Executive Director | *Tax Executives Institute, Inc.*

8:30 - 9:30 am **Keynote Address/Roundtable: *What it Takes to Get and Keep Your Seat at the Table***  
Janara Jones | *Home Depot, Inc.*  
Evelyn Kaupp | *Deloitte Tax LLP*

9:30 - 11:00 am ***Essential Communications Skills for Peers, Seniors, Subordinates, Tax & Non-Tax Professionals – A Workshop***  
Damien Boudreau, April Estes | *PricewaterhouseCoopers LLP*

***So You Think You Know "Excel?" - Challenge Yourself and Improve! (Beginners/Refreshers)***  
Professor Wayne L. Winston | *University of Indiana*

SCHEDULE CONTINUES...

# 2019 Skills and Leadership Seminar FOR IN-HOUSE TAX PROFESSIONALS

## THURSDAY, JUNE 13

CONTINUED...

11:00 - 11:15 am

Break

11:15 am - 12:15 pm

T

**Microsoft Power Tools – Power Pivot, Power Query & More**

Anthony Sciarra, Shawn Trahan, Shani Washington | *PricewaterhouseCoopers LLP*

T

**Technology Tools for Tax: A Tableau Workshop**

Ben Booher | *Deloitte Tax LLP*

12:15 - 1:30 pm

**Luncheon & Keynote Speaker/Roundtable**

**Effectively Managing Across Generations – X, Y, Millennials, etc.**

Chris Ward | *Ernst & Young LLP*

1:45 - 3:00 pm

M

**Remote and Far Flung Tax Departments – Managing, Motivating & Maintaining**

Clair Dornak | *AIG*

Anthony Sciarra, Shawn Trahan | *PricewaterhouseCoopers LLP*

T

**Technology Tools for Tax – Alteryx Workshop**

Charles Coleman, Kent Fidler, Meehir Mene | *Orasi Software, Inc.*

3:00 - 5:00 pm

S

**Negotiation Skills Workshop**

Dan Clivner, Matthew Lerner | *Sidley Austin LLP*

S

**Writing and Drafting Skills Workshop – It Just Ain't That Hard, Promise**

Kathleen Adcock, Joe Hagedorn | *Bloomberg Tax LLP*

5:00 - 6:00 pm

T

**Tax Research Tools – Thomson Reuters**

Jason Davis | *Thomson Reuters*

T

**Tax Research Tools – Bloomberg Tax**

Elisabeth Donegan | *Bloomberg Tax LLP*

6:00 - 7:00 pm

Reception & Networking

## FRIDAY, JUNE 14

7:30 - 8:00 am

Continental Breakfast

8:00 - 9:00 am

M

**Managing External Advisors or Herding Cats – Is There a Difference?**

PD

**Building My Network, and Developing My Personal Brand**

Barbara Coulter, Leon Trum | *PricewaterhouseCoopers LLP*

9:00 - 10:30 am

S

**Essential Communications Skills for Peers, Seniors, Subordinates, Tax & Non-Tax Professionals – A Workshop**

Damien Boudreau, Barbara Coulter | *PricewaterhouseCoopers LLP*

T

**So You Think You Know “Excel?” – Challenge Yourself and Improve! (Intermediate/Power Users)**

Professor Wayne L. Winston | *University of Indiana*

SCHEDULE CONTINUES...

# 2019 Skills and Leadership Seminar FOR IN-HOUSE TAX PROFESSIONALS

FRIDAY, JUNE 14

CONTINUED...

10:30 - 10:45 am	Break
10:45 am - 12:00 Noon	<p><b>S</b> <i>Time and Project Management</i></p> <p><b>S</b> <i>Delegation – Up, Down &amp; Sideways – Paradigms for Success &amp; Failure</i> Pamela Mable   <i>Ernst &amp; Young LLP</i></p>
12:00 Noon - 1:15 pm	Luncheon
1:15 pm - 3:15 pm	<p><b>S</b> <i>Writing and Drafting Skills Workshop – It Just Ain't That Hard, Promise</i> Kathleen Adcock, Joe Hagedon   <i>Bloomberg Tax LLP</i></p> <p><b>S</b> <i>Negotiation Skills Workshop</i> Dan Clivner, Matthew Lerner   <i>Sidley Austin LLP</i></p>
3:15 - 3:30 pm	Networking Break
3:30 - 4:45 pm	<p><b>PD</b> <i>Leadership Chemistry, Type &amp; Style – Challenges for the Aspiring Tax Manager</i> Maria Cumbest, Yolanda Wilson   <i>Deloitte Tax LLP</i></p> <p><b>S</b> <i>Getting &amp; Giving Feedback</i> Melisa Cook   <i>PricewaterhouseCoopers LLP</i></p>
4:45 pm	Program Concludes



# 2019 Skills and Leadership Seminar FOR IN-HOUSE TAX PROFESSIONALS

## Registrations



By web:



By mail:



By fax:



By email:

Registration is limited to members of TEI and other in-house tax professionals. (Individuals engaged in private law, accounting, or other consulting practice are ineligible to attend.) No partial or split registrations are permitted. Registration forms without payment will not be processed by TEI. **Please note:** Membership in Tax Executives Institute is on an individual basis; there are no "company" or "corporate" memberships. Only members of the Institute — or individuals whose membership applications are pending at TEI — are entitled to the member rate. All others are required to pay at the listed nonmember rate. For membership information, visit the "Membership" section of [www.tei.org](http://www.tei.org). A registration will not be processed unless it is accompanied by payment, and no registrations will be taken over the telephone.

**www.tei.org**. You must login before registering.

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

**202.638.5607**. Credit card registrations only. VISA, MasterCard, American Express, Diners Club, and Discover only. To ensure confidentiality, please fax between 9 a.m. and 4 p.m. ET.

**meetings@tei.org**

**Enrollment is limited** and registrations will be accepted on a first-come, first-served basis. Should maximum enrollment be reached prior to the seminar and TEI cannot accept your registration, you will be notified immediately. You will receive a confirmation by email; no other confirmation will be sent.

Applications should be completed in full. The requested information will be used to comply with continuing education requirements established by state CPA and bar associations as well as federal antidiscrimination rules.

## Cancellation and Substitution Policy

All cancellations must be made **in writing** by 4:00 pm ET on May 17, 2019, and will be subject to an administrative service charge of \$75 (U.S.); for cancellations after May 17, 2019 (the date handout materials become available) and before May 24, 2019, the charge will be \$200 (U.S.). No refunds will be made for cancellations received after May 24, and for no-shows. To cancel, please send an email to [meetings@tei.org](mailto:meetings@tei.org). In the event of cancellation or oversubscription of the conference, TEI's liability is limited to the return of the registration fee. There will be a \$50 substitution fee assessed if you would like to change registrants. Email substitutions to [meetings@tei.org](mailto:meetings@tei.org).

## Handout Materials

Materials will be posted in a searchable format on a secure website. Beginning two weeks before the conference, registrants will be able to access the handouts via a secure link (requiring a password), so they can download or print them out. **No paper copies will be provided in your registration materials, and no onsite printing facilities will be available.** TEI encourages you to download or print documents of interest in advance. (Wi-Fi will be available in the meeting rooms but we strongly suggest downloading the materials in advance.) Materials will remain accessible by registrants for one month after the conference.

## Facilities

TEI has secured a discounted block of rooms at the Westin Peachtree Plaza Hotel for seminar registrants at the rate of \$164 + tax per night. To make your reservation, please call 888-627-7087 or 404-659-1000 and say you are with the "TEI Skills Seminar". For online reservations, there is a link on our website and you will receive one in your confirmation email. TEI's discounted room block is limited and will likely sell out prior to our May 29, 2019 cutoff date when remaining rooms will be released back to the hotel for resale and prevailing rates will apply. Make your reservations today.

Westin Peachtree Plaza Hotel, 210 Peachtree Street, NW, Atlanta, GA 30303

## Recording Devices

The use of recording devices is prohibited. Please silence all electronic devices upon entering the meeting room.

## 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 seminar). To request information on whether you might qualify, please contact us at [meetings@tei.org](mailto:meetings@tei.org).

## Questions?

Call TEI at 202.638.5601, email to [meetings@tei.org](mailto:meetings@tei.org) or visit **www.tei.org**. Click on "Continuing Education."

# 2019 Skills and Leadership Seminar FOR IN-HOUSE TAX PROFESSIONALS

## CPE CREDIT INFORMATION



Tax Executives Institute is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Website: [www.nasba.org](http://www.nasba.org).

For more information regarding administrative policies such as complaint or refund, please contact TEI directly at 202.638.5601.

Date	June 13-14, 2019
Delivery Method	Group Live
Program Level	Basic
Field of Study	Taxes
Learning Objective	Designed to provide the tools and techniques to enable tax professionals to effectively communicate and constructively interact with their teams, departments, and companies.
Prerequisite	No prerequisites.
Advanced Preparation	No advanced preparation required.
CPE Credit	<b>18.5</b> Maximum credits for two-day program (based on a 50-minute hour).
CLE Credit	<b>15.5</b> Maximum credits for two-day program (based on a 60-minute hour).

### Disclaimers

Tax Executives Institute and TEI Education Fund accord to participants of any race, color, creed, sex or national ethnic origin all the rights, privileges, programs, and activities generally accorded or made available to participants at its program, courses, and other activities.

CPE/CLE requirements vary from jurisdiction to jurisdiction. TEI's education 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.

# 2019 Skills and Leadership Seminar

## FOR IN-HOUSE TAX PROFESSIONALS

### REGISTRATION FORM

☐ Please check here if you require special accessibility or assistance at this function. We will contact you.



#### ELIGIBILITY

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

#### FEES

##### Amount (U.S. Funds)

- ☐ \$950 Member Fee
- ☐ \$1,150 Non-Member Fee

Fee covers course materials and other items specified in seminar announcement. Applications will be accepted on a first-come, first-served basis. Applicants are encouraged to register via [www.tei.org](http://www.tei.org). Credit card registrations may be faxed to 202.638.5607 or scanned and emailed to: [meetings@tei.org](mailto: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 applications to TEI's street address.** Questions? Call 202.638.5601 or email: [meetings@tei.org](mailto:meetings@tei.org).

Name \_\_\_\_\_

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State/Province \_\_\_\_\_ Zip/Zone \_\_\_\_\_

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Charge to: ☐ VISA ☐ MasterCard ☐ American Express ☐ Discover ☐ Diners Club

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Cardholder Name (print) \_\_\_\_\_

Signature \_\_\_\_\_

If faxing your registration using a credit card, please do so between 9:00 am and 4:00 pm ET to ensure confidentiality. Fax number for registrations and cancellations is 202.638.5607. This form can be scanned and emailed to [meetings@tei.org](mailto:meetings@tei.org).

All cancellations must be made in writing by 4:00 pm ET on May 17, 2019, and will be subject to an administrative service charge of \$75 (U.S.); for cancellations after May 17, 2019 (the date handout materials become available) and before May 24, 2019, the charge will be \$200 (U.S.) No refunds will be made for cancellations received after May 24, 2019, and for no-shows. Cancellations must be received in writing to [meetings@tei.org](mailto:meetings@tei.org). Refunds of credit card registrations, less administrative charge, will be made to credit card account. TEI's Federal Taxpayer ID Number is 52-0239291.

In accordance with section 274(n) of the Internal Revenue Code, registrants are notified that that the portion of the course registration fee attributable to food and beverage is \$400 (U.S.).