



Connect. Engage. Impact.

Tax and Tax Technology Seminar / February 26-27, 2019 / Marriott San Mateo – San Mateo, California

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TEI SPEAKS

2019 Tax and Tax Technology Seminar

Dear Colleague,

The dynamic landscape of evolving markets, complex operations and rapid business changes is challenging tax departments of all sizes to “up their game” from stewards of tax compliance and planning towards strategic partners, with improved operational efficiencies across their organizations.

But what does that mean for you, the in-house tax professional? In short, digitalization and globalization require tax departments to recognize and fully embrace the role tax technology plays and to develop new skill sets to deliver sustainable value to the companies they serve.

To address these challenges, TEI has designed a two-day tax and tax technology seminar by and for in-house tax professionals. Our practical approach addresses two broad sets of questions – “why introduce technology into a process?” and “how can it work for me?” Seminar sessions range from a vision of the future digital landscape and implications for tax departments to building blocks that improve awareness for both the technology novice and expert. The unique approach we have chosen pairs subject matter experts with in-house tax professionals, exposing you to best practices as well as lessons learned from your peers as they have grappled with and solved technology-related challenges in the trenches.

Our “best-in-class” instructor cadre is comprised of thought leaders and subject matter experts from both the advisory and technology communities. These professionals will explore the benefits of and realistic goals for adopting a technology roadmap, as well as different ERP solutions and opportunities for tax integration with, or bolt-on solutions for, such systems. As important, our flexible curriculum will allow you to build a program suited to your particular interests and to “road test” technology tools in our exhibitor hall.

So, whether you are asking, “what’s a BOT” or “how to apply AI, ETL, or blockchain to direct and indirect tax through an ERP,” this seminar is for you!

Jim Silvestri
TEI International President

2019 Tax and Tax Technology Seminar

TUESDAY, FEBRUARY 26

7:00 am	Registration Opens
7:00 - 8:00 am	Breakfast
8:00 - 8:15 am	Welcome & Introductory Remarks Louis J. Mestier <i>Eldorado Resorts, Inc.</i> Sandhya K. Edupuganty <i>Texas Instruments</i>
8:15 - 9:00 am	KEYNOTE: Aventure Capitalist's View of Emerging Technologies Michael J. Bernard, Moderator <i>Vertex, Inc.</i> Kellan Carter <i>Ignition Partners</i>
9:00 - 10:00 am	The 1,2,3's of Effective Partnering with IT/Finance – Fireside with Tax and IT Justin Femmer, Andy Ruggles <i>PricewaterhouseCoopers LLP</i> Speaker <i>Adobe</i> Speaker <i>Google</i>
10:00 - 10:15 am	Break
10:15 - 11:15 am	The How To's of a Technology Roadmap: Sounds Great, But Where Do I Start? Richard Cimino, Steve Rainey <i>KPMG LLP</i> Barbara J. Young <i>Marriott International, Inc.</i>
10:15 - 11:15 am	Advanced Technology Roadmap for Tax – Staying Nimble, Resetting for Business Changes, and New Technologies – Opportunities and Pitfalls Jennifer Deutsch, Emily VanVleet <i>Deloitte Tax LLP</i> Wendy Lee <i>Salesforce</i> Karen Bain <i>New York Life</i>
11:15 am - 12:15 pm	Driving Tax Processes Through the ERP – A Hands on Tutorial 1. SAP - S/4 HANA Chris Carlstead, Moderator <i>Thomson Reuters</i> Kumar Ganesan, Lane Leskela <i>SAP America, Inc.</i>
11:15 am - 12:15 pm	Driving Tax Processes Through the ERP – A Hands on Tutorial 2. ORACLE Julien Coudrette, Jeff White <i>Grant Thornton LLP</i> Marc Seewald, Harsha Takle <i>Oracle</i>
12:15 - 1:45 pm	Luncheon Reimagining the Future of Work – Talent Strategies of Successful Tax Departments <i>[Succession planning, effective communication (within and outside department), business partnering, future skill sets]</i> Louis J. Mestier, Moderator <i>Eldorado Resorts, Inc.</i> Carrie Duarte, Ann Johnston, Breck Marshall <i>PricewaterhouseCoopers LLP</i>

SCHEDULE CONTINUES...



2019 Tax and Tax Technology Seminar

TUESDAY, FEBRUARY 26 | CONTINUED

- 2:00 - 3:00 pm **INCOME TAX PROVISION**
Beyond the Basics: Getting the Most Out of Your Tax Reporting Application
 Jamie Eagan, Moderator | *Longview*
 Cheria Coram | *Starbucks Coffee Company*
- 2:00 - 3:00 pm ***Provision Roadmap, Development Strategy, Tools and Capabilities – Mid-Level Overview***
 David Stevens, Moderator | *Cook Inlet Region, Inc.*
 Merrienne Vizza | *Thomson Reuters*
- 2:00 - 3:00 pm ***Provision Roadmap, Development Strategy, Tools and Capabilities – Inventory of Tools and Demo***
 Gary Colbert | *CSC Corptax*
 Ben Barudin | *Deloitte Tax LLP*
- 3:00 - 4:00 pm **INCOME TAX COMPLIANCE**
Compliance Roadmap, Development Strategy, Inventory of Tools, Demo, and Client Success Stories
 Gulom Narmuratov | *Johnson & Johnson Services, Inc.*
 Eric Williams | *CSC Corptax*
- 3:00 - 4:00 pm ***Compliance Roadmap, Development Strategy, Tools and Capabilities***
 Rob Clary, Moderator | *Ford Motor Company*
 Merrienne Vizza | *Thomson Reuters*
- 3:00 - 4:00 pm **INTERIM TAX PROVISION**
Projection and Planning Challenges and Opportunities
 Jamie Eagan | *Longview*
 Larry Martin | *Veritas, Inc.*
 Diane Tinney | *Bloomberg Tax*
- 4:00 - 4:30 pm Networking Break/Technology Exhibit Hall
- 4:30 - 5:30 pm ***VAT Solutions and Roadmap***
 Ann Jackson, Moderator | *Deloitte Tax LLP*
 Alexandria Bal | *Vertex, Inc.*
- 4:30 - 5:30 pm ***Indirect Tax Engine Implementations – US and Non US***
 Pam Hagan, Faranak Naghavi | *Ernst & Young LLP*
- 4:30 - 5:30 pm ***Practical Automation in the Face of Regulatory Changes***
 Diane Tinney | *Bloomberg Tax*
- 5:30 - 6:30 pm ***Digital Tax Administration – SAF-T, EU Digital Tax Plan, LATAM, Wayfair? Are We Ready?***
 Carolyn B. Bailey, Prarthana Subramanian | *Ernst & Young LLP*
- 6:45 - 7:45 pm Cocktail & Networking Reception / Technology Exhibit Hall



2019 Tax and Tax Technology Seminar

WEDNESDAY, FEBRUARY 27

7:00 am	Registration Opens
7:00 - 8:00 am	Breakfast
8:00 - 9:00 am	<i>A Practical Application of Blockchain in Tax Processes</i> Belinda Buvens <i>Proctor & Gamble</i> David Deputy <i>Vertex, Inc.</i>
9:00 - 10:00 am	<i>Building an RPA Center of Excellence in the Tax Function</i> Carli McClure, Roy Nicholson <i>Grant Thornton</i>
10:00 - 10:15 am	Break
10:15 - 11:30 am	<i>Data Analytics and Visualization – A Hands On Tutorial</i> Amelia Glum, Kelly Southall <i>Alteryx</i>
10:15 - 11:30 am	<i>Sharepoint / Workflow – How Do I Manage My Information?</i> Nancy Hsieh, Sean Trahan <i>PricewaterhouseCoopers LLP</i>
10:15 - 11:30 am	<i>GILTI / FDII / FTC / BEAT – Global Tax Integration</i> Sandhya K. Edupuganty, Moderator <i>Texas Instruments</i> Don Chung, Jonathan Lysenko <i>Thomson Reuters</i> Lester Fuwa, Mark Gasbarra <i>Forte International</i> Vera Cretcher <i>Texas Instruments</i>
11:30 am - 12:30 pm	<i>Leveraging Your Tax Technology to Support Your Tax Internal Controls</i> John Bennecke, Moderator <i>True Partners Consulting</i> Gary Colbert <i>CSC Corptax</i>
11:30 am - 12:30 pm	<i>Deals and Corporate Transformation Events – Change Catalyst</i> Ravi Gupta <i>Deloitte Tax LLP</i> Yimin Zhang <i>CVS Health</i>
11:30 am - 12:30 pm	<i>Operational Transfer Price and Your ERP</i> Terri Beigh, Robbert Kaufman <i>Ernst & Young LLP</i>
12:30 - 1:45 pm	Luncheon (Free/Networking)

SCHEDULE CONTINUES...



2019 Tax and Tax Technology Seminar

WEDNESDAY, FEBRUARY 27 | CONTINUED

1:45 - 2:45 pm

Global Indirect Tax Automation

Chris Stephenson, Moderator | *Grant Thornton LLP*
Sai Avula, Alex Baulf | *Grant Thornton LLP*
Alexandria Bal | *Vertex, Inc.*
Clara Espinosa, Heather Reiter | *Microsoft Corporation*

1:45 - 2:45 pm

E-Invoicing – A Worldwide Mandate

Bob Norton | *Deloitte Tax LLP*
Sandy Nicolson | *KPMG LLP*

1:45 - 2:45 pm

RPA Use Cases

Shawn Carter, Moderator | *Baker Hughes, a GE Company*
Michelle S. Lee | *PricewaterhouseCoopers LLP*

2:45 - 3:45 pm

Emerging Technologies – ML, AI

Steve Rainey, Elliott Torres | *KPMG LLP*

3:45 pm

Program Concludes





2019 Tax and Tax Technology Seminar

GENERAL INFORMATION

Registrations

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 \$950 member rate. All others are required to pay at the \$1,150 nonmember rate. For membership information, visit the "Membership" section of www.tei.org. A registration will not be processed unless it is accompanied by payment, and no registrations will be taken over the telephone.



By web:

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



By mail:

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



By fax:

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.



By email:

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 February 1, 2018, and will be subject to an administrative service charge of \$75 (U.S.); for cancellations after February 1, 2018 (the date handout materials become available) and before February 8, the charge will be \$200 (U.S.). No refunds will be made for cancellations received after February 8, and for no-shows. To cancel please send an email to 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.

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

A block of rooms is being held at the Marriott San Mateo Hotel. Registrants are responsible for making their own reservations. Please telephone the hotel at 866.263.1461, and identify yourself as a member of the Tax Executives Institute group. The room rate is \$259 single/double, plus tax. TEI's block of rooms will be released for sale to the public on February 8, 2019. Requests for accommodations after that date, or if the block sells out prior to February 8, cannot be ensured.

Marriott San Mateo Hotel, 1770 S. Amphlett Boulevard, San Mateo, CA 94402

Recording Devices

The use of tape or digital recorders in the classroom is prohibited. Please silence mobile phones, email devices, and pagers 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.

Questions?

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



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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.

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

Date	February 26-27, 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 recognize and embrace the role tax technology plays and to develop new skill sets to deliver sustainable value to the companies they serve for both the technology novice and expert.
Prerequisite	No prerequisites.
Advanced Preparation	No advanced preparation required.
CPE Credit	13.5 (based on a 50-minute hour).
CLE Credit	11.5 (based on a 50-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.





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REGISTRATION FORM

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



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. Credit card registrations may be faxed to 202.638.5607 or 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 applications to TEI's street address.** Questions? Call 202.638.5601 or email: meetings@tei.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 practice, as well as government employees, are ineligible to attend.

Name _____

Nickname for Badge _____

Company _____

Mailing Address _____

City _____

State/Province _____ Zip/Zone _____

Telephone _____ Fax _____

Email _____

FEES

Amount (U.S. Funds)

\$950 Member Fee

\$1,150 Non-Member Fee

Charge to: VISA MasterCard American Express Discover Diners Club

Card Number _____

Exp. Date _____ CVV _____

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.

All cancellations must be made in writing by 4:00 pm ET on February 1, 2019, and will be subject to an administrative service charge of \$75 (U.S.); for cancellations after February 1, 2019 (the date handout materials become available) and before February 8, the charge will be \$200 (U.S.) No refunds will be made for cancellations received after February 8, and for no-shows. Cancellations must be received in writing to 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.).

