



# 70<sup>th</sup> Midyear Conference Timeline | 2020

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

**CTO** - Chief Tax Officer  
**FED** - Federal Tax  
**GEN** - General Tax

**INTL** - International Tax  
**SALT** - State & Local Tax

**KEY:** **R** **ROUNDTABLE**  
**A** CPE Accounting Credit  
**E** CPE Ethics Credit

## SUNDAY, MARCH 22

9:00 AM - 11:30 AM	Executive Committee Meeting
11:30 AM - 1:00 PM	Executive Committee, Committee Chairs & Past Presidents Luncheon
12:00 PM - 7:30 PM	Registration Open
1:00 PM - 4:00 PM	Board of Directors Meeting
4:00 PM - 6:00 PM	Committee Meetings ▶ Corporate Tax Management      ▶ Financial Reporting      ▶ State and Local Tax ▶ Federal Tax                              ▶ IRS Administrative Affairs      ▶ U.S. International Tax
6:30 PM - 7:30 PM	Welcome Reception

## MONDAY, MARCH 23

7:00 AM - 5:15 PM	Registration Open
7:00 AM - 8:00 AM	Continental Breakfast
7:00 AM - 8:00 AM	<b>R</b> <b>CHAPTER LEADERS' ROUNDTABLE</b>
8:00 AM - 8:15 AM	Welcome & President's Address
8:15 AM - 8:45 AM	<b>R</b> <b>ROUNDTABLE - Developing Domestic U.S. Tax Policy - An Assistant Secretaries' (Tax Policy) Discussion</b>
8:45 AM - 9:30 AM	<b>R</b> <b>ROUNDTABLE - Developing International Tax Policy - Past, Present &amp; Future</b>
9:30 AM - 10:00 AM	Break
<b>INTL</b> 10:00 AM - 11:00 AM	GILTI and the Foreign Tax Credit - Unpacking the New Final and Proposed Regulations
<b>FED</b> 10:00 AM - 11:00 AM	Understanding the Proposed Section 451(b) and (c) Regulations
<b>SALT/INTL</b> 10:00 AM - 11:00 AM	State Tax Conformity to <i>TCJA</i> International Provisions: Issues and Potential Challenges
11:00 AM - 11:15 AM	Break
<b>CTO</b> 11:15 AM - 12:15 PM	Financial Reporting - News from Norwalk <b>A</b>
<b>FED/GEN</b> 11:15 AM - 12:15 PM	Tax Reform, One Filing Cycle Later - Views From The Trenches
<b>FED</b> 11:15 AM - 12:15 PM	The Research and Experimentation (R&E) Credit
12:30 PM - 2:00 PM	<b>LUNCH</b>   <b>R</b> <b>ROUNDTABLE - Tax &amp; Tax Technology - Meeting Customer Needs - Now and in the Future</b>
<b>SALT</b> 2:15 PM - 3:30 PM	State Tax Policy Considerations for the Next Decade
<b>FED</b> 2:15 PM - 3:30 PM	Section 355 Transactions, Post- <i>TCJA</i> - Tax Free, Taxable, or a Little of Both?
<b>INTL</b> 2:15 PM - 3:30 PM	The Final BEAT Regulations - What Changed? What Stayed the Same?
3:30 PM - 3:45 PM	Break
<b>CTO/GEN</b> 3:45 PM - 5:00 PM	Building The Case for Acquiring Tax Technology Tools - A Practical Approach
<b>INTL</b> 3:45 PM - 5:00 PM	Transfer Pricing Policy, Planning, and Practice in a Changing World
<b>CTO/FED</b> 3:45 PM - 5:00 PM	Tax Return Positions in Uncertain Times - Ethical Standards, Privilege Issues, and Risk Tolerance <b>E</b>
5:00 PM - 5:15 PM	Break
5:15 PM - 6:15 PM	CAP Subcommittee
5:15 PM - 6:15 PM	Issue Forums/Workshops (held separately) ▶ Inbound Companies      ▶ State and Local Tax

## TUESDAY, MARCH 24

7:00 AM - 5:30 PM	Registration Open
7:00 AM - 8:00 AM	CTO Breakfast
7:00 AM - 8:15 AM	Continental Breakfast
8:15 AM - 9:00 AM	<b>R</b> <b>ROUNDTABLE - U.S. Tax Administration - A Commissioner's and Chief Counsel's Assessment</b>
9:00 AM - 9:45 AM	<b>R</b> <b>ROUNDTABLE - Unilateral Taxation of the Digital Economy &amp; Cross-border Electronic Commerce - A Challenging Environment for Multinationals</b>
9:45 AM - 10:00 AM	Break
<b>INTL</b> 10:00 AM - 11:00 AM	Indirect Tax Developments Around the World
10:00 AM - 11:00 AM	<b>R</b> <b>ROUNDTABLE - The Evolving Role of IRS Appeals</b>
<b>SALT</b> 10:00 AM - 11:00 AM	State Tax Restructuring: Managing the Effective Rate
11:00 AM - 11:30 AM	Break
<b>FED/INTL</b> 11:30 AM - 12:30 PM	Taxation of Cryptocurrencies
11:30 AM - 12:30 PM	<b>R</b> <b>ROUNDTABLE - The Future of Tax Education - Changes &amp; Challenges</b>
<b>FED/INTL</b> 11:30 AM - 12:30 PM	Strategic Global Tax Modeling - Tools and Techniques
12:30 PM - 2:00 PM	<b>LUNCH</b>   <b>R</b> <b>ROUNDTABLE - Pillars of the International Tax System? The OECD's Digital Economy Project</b>
<b>GEN</b> 2:15 PM - 3:30 PM	Alteryx Workshop - Automating Complex Tax Calculations & Excel Workpapers
<b>INTL</b> 2:15 PM - 3:30 PM	Applying the Section 245A Regulations - Practical & Strategic Considerations
<b>FED</b> 2:15 PM - 3:30 PM	Compensation & Benefits Taxation - Practical Approaches to the <i>TCJA</i> 's Changes
3:30 PM - 3:45 PM	Break
<b>INTL</b> 3:45 PM - 5:00 PM	Downward Attribution Under Section 958 - New Guidance and Practical Considerations
<b>FED</b> 3:45 PM - 5:00 PM	Bridging the Gap: Termination & Severance Issues in the Age of Job Mobility
<b>SALT</b> 3:45 PM - 5:00 PM	State Tax Data Challenges
5:00 PM - 5:15 PM	Break
<b>GEN</b> 5:15 PM - 6:15 PM	Emerging Tax Professionals
<b>SALT</b> 5:15 PM - 6:15 PM	State Tax Credits & Incentives
<b>FED/GEN</b> 5:15 PM - 6:15 PM	Reading an IRS Transcript - Nuts, Bolts & Nuance
6:30 PM - 9:00 PM	Reception

## WEDNESDAY, MARCH 25

7:00 AM - 8:30 AM	TR Advisory Boards
7:30 AM - 12:00 PM	Registration Open
7:30 AM - 8:30 AM	Continental Breakfast
<b>CTO</b> 8:30 AM - 9:45 AM	It's About Your People!! - Attracting, Developing, and Retaining Your Most Precious Asset
<b>FED/INTL</b> 8:30 AM - 9:45 AM	Understanding and Applying New Section 163(j) - Latest Guidance & Practical Considerations, Including Debt Restructuring
<b>INTL</b> 8:30 AM - 9:45 AM	The Latest in U.S. Transfer Pricing Controversy
9:45 AM - 10:00 AM	Break
<b>FED/INTL</b> 10:00 AM - 11:00 AM	Implementing the Final Section 263A Regulations
<b>FED</b> 10:00 AM - 11:00 AM	"Loss Corporations" After Tax Reform - The Increased Relevance of Section 382
<b>SALT</b> 10:00 AM - 11:00 AM	State Tax Apportionment Issues
11:00 AM - 11:15 AM	Break
<b>SALT</b> 11:15 AM - 12:15 PM	Accounting for State Taxes - Selected Issues
<b>FED</b> 11:15 AM - 12:15 PM	Opportunity Zones - Benefits & Burdens
12:15 PM - 1:00 PM	Box Lunch



# 70<sup>th</sup> Midyear Conference Timeline | GENERAL INFORMATION

**ELIGIBILITY TO ATTEND:** Registration is open to members of TEI and other in-house tax professionals. (Individuals engaged in private law, accounting, or other consulting practice are ineligible to attend.) TEI is offering an early registration discount to members and nonmembers whose registrations and payments **are received by** TEI by 4:00 p.m. ET on February 10, 2020.

### REGISTRATION FEES (U.S. DOLLARS)

Member (by 2/10)	\$ 950	Non-Member (by 2/10)	\$ 1,200
Member (after 2/10)	\$ 995	Non-Member (after 2/10)	\$ 1,250
First-Timer (Member by 2/10)	\$ 750	Member Emeritus	\$ 600
First-Timer (Member after 2/10)	\$ 800	Member in Transition	\$ 600
		Spouse	\$ 300

### 1-DAY ONLY (U.S. DOLLARS)

Member – Monday	\$ 450	Member – Wednesday	\$ 300
Non-Member – Monday	\$ 550	Non-Member – Wednesday	\$ 350
Member – Tuesday	\$ 450		
Non-Member – Tuesday	\$ 550		

**Team Discount:** As a special incentive for companies to send multiple attendees, a \$200 discount will apply for the third (and all subsequent) registrants from your company\*. During the registration process, enter "MY20TEAM" into the box labeled "Discount Code." The \$200 discount will be applied before checkout. \*First-timer and group discounts may not be combined. All participants in the group discount must be registered at the full member or non-member rates.

**FIRST-TIME REGISTRANTS:** TEI has reduced the registration fee by \$200 for members who are attending their first TEI conference (Annual or Midyear). If you are a member attending your first conference, please check the appropriate box on the registration form and submit your payment of \$750 by February 10, 2020, or \$800 after that date. (This offer applies only to TEI members and pending members.)

**MEMBERS IN TRANSITION:** TEI has lowered the conference fee for members in transition. Unemployed individuals who are members in good standing may register for the conference by paying only \$600. Members wishing to take advantage of the reduced fee should mark the appropriate box on the registration form. They will be contacted to affirm both their desire to obtain a full-time position in industry and that they are not holding non-qualifying employment such as with a law or accounting firm, as well as their adherence to TEI's policy of non-solicitation.

**REGISTRATION PROCEDURE:** Please register online at MY20.tei.org 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, and no registrations will be accepted over the phone. Because of TEI's lockbox procedures, registrations should not be sent to TEI's street address.

By WEB: Go to [MY20.tei.org](http://MY20.tei.org). | By Email: [meetings@tei.org](mailto: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 Other Express Mail: Tax Executives Institute, Lockbox 9407 PO Box 70280, Philadelphia, PA 19176-0280.

Fee covers the reception on Sunday, March 22; continental breakfast and luncheon on Monday, March 23; continental breakfast, luncheon, and reception on Tuesday, March 24 continental breakfast and lunch on Wednesday, March 25; refreshment breaks; and all conference materials. After your registration has been processed, you will receive a confirmation via email within two business days. (If you don't see it in your inbox, check your spam filter or call (202) 638-5601.)

**CANCELLATION AND SUBSTITUTION POLICY:** Refunds will be made for cancellations received in writing by 4:00 pm ET on February 24, 2020, and will be subject to an administrative service charge of \$75 (U.S.); for cancellations after February 24, 2020 (the date handout materials become available) and before March 2, 2020 the charge will be \$200 (U.S.). No refunds will be made for cancellations received after March 2, 2020, 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. In the event of cancellation of the conference, TEI's liability is limited to the return of the registration fee. Members unable to attend may purchase the conference materials for \$200 (U.S.). There will be a \$50 charge for substitutions (plus any fee differential). Email substitutions to [meetings@tei.org](mailto:meetings@tei.org). Your hotel reservation must be cancelled separately.

**CONFERENCE PARTICIPATION:** One day registrations are available for the 70th Midyear Conference. You may register for the education sessions on Monday, Tuesday, or Wednesday or a combination of two. Daily registration includes the handout materials, continental breakfast, refreshments breaks, and lunch. It does not include any evening functions. Admission to luncheons will be by ticket only. 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 advance its educational, networking and advocacy mission. 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 following the conference. Registrants wishing to have their names removed from the list provided to sponsors should 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 [asktei@tei.org](mailto:asktei@tei.org). Sponsors are not permitted to attend any educational sessions.

**SPOUSE:** The spouse fee covers the receptions on Sunday and Tuesday.

**MEAL TICKETS:** Registrants may purchase tickets for guests to luncheons, receptions, and a box lunch on Wednesday. at the TEI Registration Desk. Guest tickets may not be purchased for sponsors or practitioners.

**CONFERENCE HANDOUT MATERIALS:** Conference 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 be downloaded or printed. No paper copies will be provided in your registration materials, and there will not be printing facilities available onsite. TEI encourages you to download or print documents of interest in advance. Materials will remain accessible by conference registrants for one month after the conference.

**CONFERENCE PROGRAM:** The conference program is subject to change. Please check the interactive program on [MY20.tei.org](http://MY20.tei.org) for the most up-to-date schedule of events.

**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 non-members) 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](mailto:meetings@tei.org).

**CPE CREDIT INFORMATION:** Tax Executives Institute is registered with the National Association of State Boards of Accountancy as a sponsor of "group live" 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](http://www.nasba.org). For more information regarding administrative policies such as complaint and refund, call TEI at (202) 638-5601.

Date: Midyear Conference, March 22 - 25, 2020

Delivery Method: Group Live

Program Level: Overview

Prerequisites: None

Field of Study: Taxes

Learning Objectives: To provide updates on legislative, regulatory, and judicial developments relating to federal, state & local, international, and Canadian taxation, as well as to analyze the effect of financial reporting developments on effective operation for corporate tax departments.

Advanced Preparation: No advanced preparation required. 960 minutes possible.

CLE Credits possible: Approx. 16 based on a 60-minute hour.

Accounting Credits possible: 1

Approx. 19 based on a 50-minute hour.

Ethics Credits possible: 1

CPE Credits possible: Approx. 19

TEI's 70th Midyear Conference is co-sponsored by TEI Education Fund, a qualified section 501(c)(3) organization. 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 programs, 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.

**HOTEL INFORMATION:** TEI's 70th Midyear Conference will be held at the Grand Hyatt Washington, Washington, D.C. A block of rooms is being held for conference registrants, who are responsible for making their own hotel reservations. Upon registering for the conference with TEI, you will receive an automated email confirmation. A second email will be sent within two business days after your payment has been processed. This email will include a weblink to our block of rooms at the Grand Hyatt. The link is also available on [MY20.tei.org](http://MY20.tei.org). Reservations may only be made by using this link; telephone reservations will not be accepted.

The room rates are \$369 single/double occupancy. All rates are subject to prevailing taxes. The TEI block of rooms will be released for sale to the public on March 6, 2020. Requests for accommodations after that date, or sooner if the block sells out, cannot be ensured. Registrants are urged to make their reservation as soon as possible.

The Grand Hyatt Washington's address is: 1000 H Street, NW, Washington, DC 20001. Phone: (202) 582-1234. Please visit [MY20.tei.org](http://MY20.tei.org) for parking and travel information. General information on the hotel may be found at [www.grandwashington.hyatt.com](http://www.grandwashington.hyatt.com).

**75 YEARS**  
TEI  
1944-2019  
**ANNIVERSARY**

**2020 MIDYEAR Conference**  
March 22-25, 2020  
Grand Hyatt Washington, DC

**Tax Policy, Practice & Administration  
At Home & Abroad – AN ASSESSMENT**

#MY20

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