



Tax and Tax Technology Seminar / February 24-26, 2020 / Scottsdale Plaza Hotel – Scottsdale, AZ

PLANNING COMMITTEE:

Katrina H. Welch
International President, TEI

James Kennedy
*Chair, TEI's Continuing Education
Committee*

Louis Mestier
*Chair, TEI's Corporate Tax Management
Committee*

Sandhya Edupuganty
TEI's Executive Committee

Cheria Coram
Chair, TEI's Technology Subcommittee

Eli J. Dicker
Executive Director, TEI

W. Patrick Evans
Chief Tax Counsel, TEI

2020 Tax and Tax Technology Seminar

Dear Colleagues,

I am delighted to welcome you to TEI's **2020 Tax and Tax Technology Seminar**. Our seminar is dedicated to data, technology and tech-enablement topics, designed by and for in-house tax professionals. Sessions range from a vision of the future digital landscape and its implications for tax departments to practical application of technology tools to assist both the technology novice and expert. Sessions provide automation use cases, leading practices, and demonstrations of relevant existing and emerging technologies, ranging from ETL and analytical tools to cloud and cognitive technologies; challenges and opportunities to the tax function in the face of disruptive technologies; and the role of data strategy in tech-transformation strategy – to name just a few. Program content showcases the key technologies and automation tools transforming the tax functions of today and look ahead to disruptive technologies with growing relevance to the tax operations of the future. Our "best in class" instructor cadre is comprised of thought leaders and subject matter experts from both the advisory and technology communities.

This year, we have added **PwC's Analytics & Automation Academy** to our seminar! This optional, free, 3rd day enhances the overall quality of our program by providing intensive, hands-on training, that will allow seminar attendees to practice on and gain greater proficiency with key automation and data visualization tools, as well as work on generic tax use cases. PwC instructors will provide one-on-one instruction and assistance.

Last year's inaugural tax and tax technology seminar was an absolute sellout, with an unfilled waitlist. Registration is now open for this market-leading educational opportunity. I look forward to welcoming you in Scottsdale.

A handwritten signature in black ink that reads 'Katrina Welch'. The signature is fluid and cursive, written in a professional style.

Katrina H. Welch
TEI International President



Connect. Engage. Impact.

2020 Tax and Tax Technology Seminar

KEY: = Hands on Learning

SUNDAY, FEBRUARY 23

5:00 - 7:00 PM

Registration Opens

5:30 - 7:00 PM

Welcome Reception

MONDAY, FEBRUARY 24

DAY 1

7:00 AM

Registration Opens

7:00 - 7:45 AM

Breakfast & Technology Exhibit Hall

7:45 - 8:00 AM

Welcome & Introductory Remarks

Cheria Coram | Starbucks Coffee Company
Sandhya K. Edupuganty | Texas Instruments

8:00 - 9:00 AM

Data Governance - The Foundation for Tax Transformation

Mike Doyle, Jim Hellmich, Scot Wilce | Amazon.com, Inc.

9:00 - 10:00 AM

Creating a Data Driven Culture

Amit Ringshia, Chris Schulman | KPMG LLP
Clara Parra Espinosa, Carmen White | Microsoft Corporation

10:00 - 10:15 AM

Break

10:15 - 11:15 AM

BREAKOUT SESSIONS

Indirect Tax Vision: Transforming Big Data into Business Insights & Improved Financial Management

Sai Avula, Rob Clarke | Grant Thornton LLP
Kong Yang | Vertex
Steve James | Cordiance
Heidi R. Schaefer | Salt River Project

Operational Transfer Pricing and Technology

Arthur Bichler, Frank Rork | Edwards Lifesciences
Jamie Eagan | Longview

The Burden of Interdependencies of Data from International to State is Lifted with Automation

Gary Colbert | CSC Corptax
Lisa Covelli, Andy Gold | Deloitte Tax LLP
Rob Clary | Ford Motor Company
Tanya Webb | Chevron USA, Inc.

11:15 AM - 12:15 PM

BREAKOUT SESSIONS

Building and Optimizing Transfer Pricing Technology Solutions: From ERP to Data Modeling and Actionable Insights

Ben Brewer, Greg Reeves | PricewaterhouseCoopers LLP
Belinda Strobel | Elanco US, Inc.

Creating Your Connected Tax Data Ecosystems

Colleen Sebra, Emma Spektor | Ernst & Young LLP
Sharon Rosiak | Thomson Reuters

Data Automation 2.0

George Gump | Thomson Reuters
Ken Jaslow | KPMG LLP
LaShell Estes | Westrock Company

SCHEDULE CONTINUES...

EXHIBITORS (as of 2/10/20)

- ▶ Alteryx
- ▶ Bloomberg Tax & Accounting
- ▶ Crowe LLP
- ▶ CSC Corptax
- ▶ Decision Modeling, Inc.
- ▶ Deloitte Tax LLP
- ▶ Forte International Tax
- ▶ Global Tax Management, Inc.
- ▶ Grant Thornton LLP
- ▶ KPMG LLP
- ▶ Longview
- ▶ PricewaterhouseCoopers LLP
- ▶ RSM US LLP
- ▶ Thomson Reuters
- ▶ Vertex, Inc.
- ▶ Workiva, Inc.
- ▶ XCM





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MONDAY, FEBRUARY 24

DAY 1 CONTINUED...

12:15 - 1:45 PM

LUNCHEON (Presentation)

Tax in the Cloud

Ann Jackson, Steve Losavio | *Deloitte Tax LLP*

1:45 - 2:15 PM

Networking Break & Technology Exhibit Hall

2:15 - 3:15 PM

BREAKOUT SESSIONS

Connecting your Data, Teams, and Documents to Overcome Tax Process Challenges

Tom Fezza, Richard Greenwell, Kristen TeBrink, | *Workiva*
Steve Shargent | *Liberty Media*

International Tax Transformation

Mark Gasbarra | *Forte International*
Nancy Loube | *Brunswick Corporation*

How Tableau Uses Tableau in Their Tax Function

Michelle Chau, Mike Crook | *Tableau*

3:15 - 4:15 PM

BREAKOUT SESSIONS

Power Automate and PowerApps – The Rise of the Citizen Developer

Jeff Bogan, Richie Sater | *Ernst & Young LLP*
Daniel Wollmann | *Microsoft Corporation*

The Power of Storytelling with Data Visualization

Christopher Schulman, Alan Zhao | *KPMG LLP*

Innovating Outside the Box: Setting Strategic Vision for Tech-Enabled Tax Transformation

Stephen Bonck, Lisa Covelli | *Deloitte Tax LLP*
Ju Lee | *Fortive*

4:15 - 4:45 PM

Networking Break & Technology Exhibit Hall

4:45 - 5:45 PM

Emerging Technology Panel – Perspectives from Incubation Leaders

Cheria Coram, Moderator | *Starbucks Coffee Company*
Justin Femmer, Moderator | *PricewaterhouseCoopers LLP*
Gary Colbert | *CSC Corptax*
Jamie Eagan | *Longview*
Sharon Rosiak | *Thomson Reuters*
Neal Schneider | *Crowe LLP*
Kong Yang | *Vertex, Inc.*

5:45 - 7:15 PM

Networking Break & Technology Exhibit Hall





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TUESDAY, FEBRUARY 25 DAY 2

7:00 - 8:00 AM

Breakfast & Technology Exhibit Hall

8:00 - 9:00 AM

AI & Intelligence Process Automation in Tax Function

Daren Campbell, Ivan Roussev, Peter Saber | *Ernst & Young LLP*

9:00 - 10:30 AM

BREAKOUT SESSIONS



Hands-on Learning in Data Transformation and Analytics: Alteryx

Amelia Glum | *Alteryx*



Hands-on Learning in Power Automate (Office 365)

Daren Campbell, Scott Elsky, Richie Sater | *Ernst & Young LLP*

Daniel Wollmann | *Microsoft Corporation*

Tableau Use Cases

Beth Mueller | *Deloitte Tax LLP*

John Barnes, Michelle Chau | *Tableau*

Emerging Tech "Power Up": OCR – Advanced Concepts, Applications, and Use Cases

Matt Beachy, Allison LeClair | *PricewaterhouseCoopers LLP*

10:30 - 11:00 AM

Networking Break & Technology Exhibit Hall

11:00 AM - 12:15 PM

BREAKOUT SESSIONS

The Next Wave of Technology Transformation

Geralyn Hurd | *Crowe LLP*

Kirsten Light | *Ernst & Young LLP*

Sharon Rosiak | *Thomson Reuters*

Getting More Out of Enterprise IT and Existing Systems

Ryan Sheehan | *Bloomberg Tax & Accounting*

Stephen Chung, Andy O'Brien | *KPMG LLP*

Go from Data to Decisions ... Now to Next Best Action!

Rob Clarke, Chris Jarski | *Grant Thornton LLP*

Paul Hardin | *Martin Marietta*

Randy Richeson | *Milliken & Company*

Emerging Tech "Power Up": Alteryx – Advanced Concepts, Applications, and Use Cases

Joel Miller, Steven Pocaroba | *PricewaterhouseCoopers LLP*

12:15 - 1:30 PM

LUNCHEON (Free/Networking)

SCHEDULE CONTINUES...





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TUESDAY, FEBRUARY 25

DAY 2 CONTINUED...

1:30 - 2:45 PM

BREAKOUT SESSIONS

Building the Business Case for Tax Automation

Ann Jackson, Moderator | *Deloitte Tax LLP*
Ryan Sheehan | *Bloomberg Tax & Accounting*
Michael Bernard | *Vertex, Inc.*
Ketan Patel | *Morgan Stanley*

Practical Issues Being Solved by Blockchain Today and Where Tax Fits In

Doreen Griffith, Joel Waterfield | *Grant Thornton LLP*
Ed Zabar | *Verif-y, Inc.*

Leveraging Emerging Tech in Tax – Developing an Automation Strategy and Governance for Embraced Momentum and Operating at Scale

Daren Campbell, Moderator | *Ernst & Young LLP*
Geraldyn Hurd, Neal Schneider | *Crowe LLP*

Automate & Scale: Applying Technology to Tax Planning

Brian Billet | *CSC Corptax*
John Modzelewski | *KPMG LLP*

2:45 - 3:00 PM

Break

3:00 - 4:15 PM

Integrating Tax with Microsoft Office 365 - Tax Portal v2.0

Teresa Peacock, Sean Trahan | *PricewaterhouseCoopers LLP*

4:15 PM

Program Concludes for Days 1-2

4:30 - 6:15 PM

OPTIONAL

Tax Technologist Meet Up – Idea & Experience Sharing

Open to TEI Members and Member-eligible

Hear from your peers and share experiences, challenges, recent efforts and what's next in tech-enabled transformation; small group breakout discussions on topics of interest





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WEDNESDAY, FEBRUARY 26

DAY 3 (OPTIONAL)

7:00 - 8:00 AM

Breakfast

8:00 AM - 12:15 PM

PwC's Analytics & Automation Academy
Extended Hands-on Learning and Practical Use Cases



PwC training laptop provided for each attendee, pre-loaded with all data and applications required for the academy, and generic tax use cases.

Matt Beachy, Balaji Ganapathi, TraLiza King,
Allison LeClair, Joel Miller, Petar Petrov | *PricewaterhouseCoopers LLC*

12:15 pm

Day 3 Hands-on Learning Program Concludes

12:15 - 12:45 pm

Boxed Lunch (take and go)

OPTIONAL

Attendees may stay for more advanced automation demonstration and directed discussions on deployment strategies and how to take next steps to kick-start or accelerate.

12:45 - 1:30 pm

PwC's Analytics & Automation Academy - Robotics Demo+

1:30 - 2:30 pm

PwC Facilitated Breakout Discussions

Help kick-start your use case development and deployment of self-service data automation tools within your own organizations

2:30 pm

Program Concludes





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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 3, 2020, and will be subject to an administrative service charge of \$75 (U.S.); for cancellations after February 3, 2020 (the date handout materials become available) and before February 10, the charge will be \$200 (U.S.). No refunds will be made for cancellations received after February 10, 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.

Lodging

TEI has secured a discounted block of rooms at the Scottsdale Plaza Hotel for seminar registrants at the rate of \$225 + tax per night (+ a mandatory resort fee of \$25 per night). To make your reservation, please call 800-832-2025 and say you are with the "TEI Tax & Tax Technology Seminar". For a link to online reservations, please visit the event page on TEI's website. TEI's discounted room block is limited and will likely sell out prior to our January 31, 2020 cutoff date when remaining rooms will be released back to the hotel for resale and prevailing rates will apply. Make your reservations today.

The mandatory resort fee of \$20 includes: wireless guestroom and public area internet access, in-room coffee, local & 800 calls, self and valet parking, putting green, tennis court and tennis equipment rental, 24-hour fitness center and pool access, and local hotel shuttle service (airport shuttle service not provided).

Scottsdale Plaza Hotel, 7200 N. Scottsdale Road, Scottsdale, AZ 85253

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 24-26, 2020
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).

* Please note: CPE hours are subject to change.

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

(Check One)

2-Day Registration

3-Day Registration

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 3, 2020, and will be subject to an administrative service charge of \$75 (U.S.); for cancellations after February 3, 2020 (the date handout materials become available) and before February 10, the charge will be \$200 (U.S.) No refunds will be made for cancellations received after February 10, 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.).