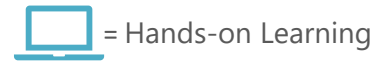




# 2020 Tax & Tax Technology Seminar



## Day 1-2 Program Session Descriptions

### ***Data Governance – The Foundation for Tax Transformation***

Jim Hellmich, Scot Wilce, Mike Doyle | *Amazon*

### ***Creating a Data Driven Culture***

Increasing importance of a data strategy to harness the power of emerging technologies. A data strategy is incomplete without a data-driven culture to support it. Learn more on the building blocks of the data landscape related to finance and tax and how tax leaders can enable modern data centric processes and operations.

Amit Ringshia, Chris Schulman | *KPMG LLP*

Clara Parra Espinosa, Carmen White | *Microsoft Corporation*

### ***Operational Transfer Pricing and Technology***

Learn how Edwards Lifesciences is transforming their Operational Transfer Pricing process into an enterprise solution. Discuss the business conditions that led to the need for the investment in technology, challenges being addressed, and long-term vision of the role of technology in improving Operational Transfer Pricing analysis, reporting, adjustments and Price Setting for Edwards Lifesciences.

Jamie Eagan | *Longview*

Arthur Bichler, Frank Rork | *Edwards Lifesciences*

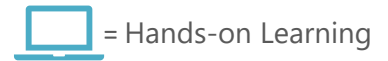
### ***Indirect Tax Vision: Transforming Big Data into Business Insights and Improved Financial Management***

Today's big data environments in the indirect tax space require substantial time to perform data manipulation, transformation, and reporting for the vast majority of enterprises. Understanding the fast-moving tax technology environment to transform the indirect tax processes, reporting, and analytical abilities into an end-to-end solution can improve the collaboration, agility, and responsibility to ownership of the enterprise, while also providing efficiency, accuracy in reporting, and real-time visibility to improve margin for the enterprise. Understanding how these technologies can interplay with indirect tax engines and build a wrap-around providing a more holistic end to end solution.

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This session will focus on how to view the indirect tax function in a different way, by transforming the manner in which businesses extract, aggregate, transform, automate, and warehouse data that can be used for multiple purposes, including sales and use tax, business licenses, and property tax reporting. US focused with inclusion of VAT.

Rob Clarke, Sai Avula | *Grant Thornton LLP*

Kong Yang | *Vertex*

Stephen James | *Cordiance*

Heidi R. Schaefer | *Salt River Project*

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

Today's post-tax reform and BEPS environment presents an increasingly complex landscape for tax departments to navigate, while the headcount in the income tax group remains small and unchanged in face of the greatly-increased workload. Learn how an income tax team leveraged technology to focus on more strategic, proactive work and be better partners and advocates within business.

Gary Colbert | *CSC Corptax*

Lisa Covelli, Andy Gold | *Deloitte Tax LLP*

Rob Clary | *Ford Motor Company*

Tanya Webb | *Chevron USA, Inc.*

### ***Building and Optimizing Transfer Pricing Technology Solutions: from ERP to Data Modeling and Actionable Insights***

This session focuses on: (1) Understanding how to effectively advocate for transfer pricing requirements during your ERP implementation/upgrade; and (2) understanding transfer pricing specific technology solution options to improve data modeling, identify tax planning opportunities and gain business performance insights.

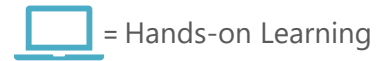
Ben Brewer, Greg Reeves | *PricewaterhouseCoopers LLP*

Belinda Strobel | *Elanco US, Inc.*

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### ***Creating your Connected Tax Data Ecosystems***

Do you struggle with disconnected data sources? Are you interested in understanding what tools are available to help you create a connected tax data ecosystem? Do you want to learn how to determine what tools should be used to solve the variety of your disconnected data issues? This session will introduce you to the latest connectivity tools including data integration (Alteryx), Robotic Process Automation (RPA), and Application Programming Interfaces (API). You will learn the strengths and weaknesses of the various tools to understand which tool should be used for a specific data connectivity challenge.

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

### ***Data Automation 2.0***

Looking to chart the next step in your data automation course? Learn how information accessibility improvements and plug-and-play connectors are helping to streamline and automate the flow of information from ERP, through Tax technology and into Reporting. During this session a multinational corporation will share how they worked with their Big 4 advisor to take their data management to the next level.

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

### ***Tax in the Cloud***

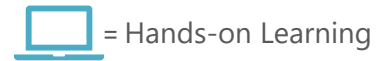
With evolving business models and increasing legislative demands around global direct and indirect tax, cloud technology and ERP modernizations represent a unique chance for tax departments to “go digital” and address significant data and reporting challenges.

Ann Jackson, Steve Losavio | *Deloitte Tax LLP*

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

The speakers will share their experience using a cloud based Tax Operations Management platform that connects workpapers, data and teams, allowing them to streamline their entire tax reporting process with efficiency, controls and audit trail. We will discuss how the platform enables tax teams to modernize tax processes, overcome primary challenges, free up more time for value-added activities, and achieve real ROI.

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

## ***International Tax Transformation***

Transforming legacy systems and streamlining data processing through ERP, VantagePoint, and tax reporting software.

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

## ***How Tableau uses Tableau in their Tax function***

No clean data? No problem! Too many manual hours? Tableau can help. This session will be focused on where and how the Tableau Tax team uses Tableau in our daily function to build efficiencies and how we have implemented Tableau in our compliance and planning cycles.

Michelle Chau, Mike Crook | *Tableau*

## ***Innovating Outside the Box: Setting Strategic Vision for Tech-enabled Tax Transformation***

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

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### ***Power Automate and PowerApps - The Rise of the Citizen Developer***

Microsoft projects that citizen developer applications will grow from 72m today to 500m+ by 2023. Learn about the tools available in Office 365 including, Flow, UIFlow, Connectors, AI Builder, and PowerApps. Learn how to use Power Automate and PowerApps to improve your tax function and empower your tax resources to become citizen developers to solve their own challenges with innovative thinking and tools.

Jeff Bogan, Richie Sater | *Ernst & Young LLP*

Daniel Wollmann | *Microsoft Corporation*

### ***The Power of Storytelling with Data Visualization***

Market forces have created great change and disruption in the tax industry. Tax department's preliminary focus has been employing technology to drive efficiency and cost reduction. As the tax function continues to evolve, the expectation has shifted towards value creation and business alignment. The growing volumes of data within the tax function has been an impediment to gaining these necessary insights. Data visualization can improve the speed to insight and illuminate market trends that may have not been otherwise identified. In this session, we explore how data visualization can be used to marry human intelligence and insight with data and technology.

Alan Zhao, Christopher Schulman | *KPMG LLP*

### ***Emerging Technology Panel - Perspectives from Incubation Leaders***

Hear from tech vendors on what they see as the next tech-enabled capabilities to bring to the tax department, how they approach co-developing, and what they see on the horizon for next wave disruptors.

*Thomson Reuters | Vertex | CSC Corptax | Longview | Crowe LLP*

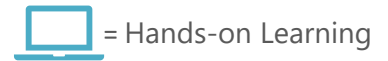
Justin Femmer, Moderator | *PricewaterhouseCoopers LLP*

Cheria Coram, Moderator | *Starbucks*

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## ***AI & Intelligence Process Automation in Tax Function***

Are you ready for Artificial Intelligence in your tax function? Do you have a strong data foundation? Learn what tax problems AI is being used to solve tax today, what is coming tomorrow, and the foundation required to effectively benefit from AI in your tax function.

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

## ***Hands-on Learning in Data Transformation and Analytics: Alteryx***

Instructor-led learning on Alteryx Designer for beginners, with practical use cases for tax. Learning materials, case study exercises, and temporary licenses along with download instructions will be provided to registrants of this session in advance. Attendees will need to bring their laptop with the downloaded class materials and application.

Amelia Glum | *Alteryx*

## ***Hands-on Learning in Power Automate (Office 365)***

Instructor-led training on Power Automate (within Microsoft Office 365), with practical use cases for tax. Learning materials and case study exercise will be provided to registrants of this session in advance. Attendees will need to have Office 365 license with Power Automate if they wish to follow along with the exercise on their own machine.

Daren Campbell, Scott Elsky, Richie Sater | *Ernst & Young LLP*  
Daniel Wollmann | *Microsoft Corporation*

## ***Tableau Use Cases***

Use cases to demonstrate how Tableau is driving actionable insight in Tax

Beth Mueller | *Deloitte Tax LLP*  
Michelle Chau, John Barnes | *Tableau*

## ***Emerging Tech "Power Up": OCR – advanced concepts, applications, and use cases***

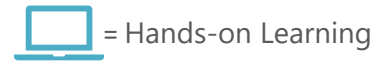
Matt Beachy, Allison LeClair | *PricewaterhouseCoopers LLP*

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# 2020 Tax & Tax Technology Seminar



## ***The Next Wave of Technology Transformation***

Over the last decade tax departments have been transforming through the adoption of technology and automation solutions. As we look ahead to the next wave of transformation technologies such as Artificial Intelligence and Machine Learning are paving the way; while interconnectivity through open APIs are driving a more seamless customer experience. Join this session to hear specific examples of how Thomson Reuters is collaborating with both Customers and Partners to pave the way for the next wave of transformation.

Sharon Rosiak | *Thomson Reuters*

Geralyn Hurd | *Crowe LLP*

Kirsten Light | *Ernst & Young LLP*

## ***Getting More out of Enterprise IT and Existing Systems***

All software has its limitations on its built-in capabilities. But there is potential gold inside the data inside your tax software. Learn practical examples of how tax departments have employed creative use of software to help the tax department to monetize enterprise technologies to achieve better effectiveness and efficiency as well as transform the tax function to add strategic value to the business.

Ryan Sheehan | *Bloomberg Tax & Accounting*

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

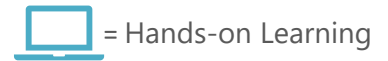
## ***Go from Data to Decisions ... Now to Next Best Action!***

Now more than ever, global companies must work with large amounts of tax data at a level that can't be achieved through manual, non-scalable spreadsheets. Continuing to work in outdated spreadsheet models expose corporate tax departments to inefficiency, risks, and inaccuracies that taxing authorities are diligently examining. A practical implementation approach will be presented along with several real-world client illustrations of how technology is improving multi-nationals tax operations and reporting, resulting in less risk and allowing them to take action in explaining results confidently and on opportunities to

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reduce tax expense, while adding more value to the business as a whole through these valuable insights.

In this session, we will take tax professionals from Now (in spreadsheets) to Next (technology enabled). One that is empowered by direct data connection, automated data cleansing, a central tax data repository and insightful real-time analysis not only for you and those you lead but C-Suite needs and interests as well. All without little to no IT support.

Rob Clarke, Chris Jarski | *Grant Thornton LLP*  
Randy Richeson | *Milliken & Company*  
Paul Hardin, Jr. | *Martin Marietta Materials, Inc.*

### ***Emerging Tech "Power Up": Alteryx – advanced concepts, applications, and use cases***

Joel Miller, Steven Porcorba | *PricewaterhouseCoopers LLP*

### ***Building the Business Case for Tax Automation***

Tax automation is an imperative for the future of the tax department. Obtaining funding and support from IT and executive finance leadership involves both quantitative and qualitative KPIs. Hear how companies are gaining executive sponsorship in their tax automation program.

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

### ***Automate & Scale: Applying Technology to Tax Planning***

Automate your way forward with a streamlined, structured, and controlled environment that produces high quality and consistent reports for management, scales to tax planning and value-added activities, and a better work-life balance for the tax team.

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

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### ***Practical Issues being Solved by Blockchain Today and where Tax Fits In***

*Who are the New Kids on the Block? And do they have the RIGHT STUFF?*

Blockchain Technology continues to make inroads into corporate America, as well as, domestic and foreign government agencies. As companies continue to incorporate this technology, the need for tax departments to participate with this technology will continue to increase. Additionally, as some governments make plans to be paid via cryptocurrency, the runaway for multinational tax departments to use crypto currency will continue to shorten. This session will discuss the practical issues that tax departments can solve with use of this new technology including: transfer pricing, customs, and foreign exchange strategy and liquidity. Participation with this technology will be able to collaborate real-time with their Treasury, Legal and Supply Chain departments allowing them to provide greater accuracy in a more efficient matter and thereby reducing the overall risk to the company. This session will provide Clarity on the most practical issues being solved by Blockchain today for purposes of Tax.

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

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


Discuss common use cases, real-world benefits, advanced concepts and applications of self-service tools. Developing an automation strategy and governance for operating at scale.

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

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## 2020 Tax & Tax Technology Seminar

 = Hands-on Learning

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

Most tax departments are making significant strides in technology automation, enhancing sourcing & use of data, collaboration/workflow & upskilling their teams. However, pulling this all together into a 'nerve center' for tax, where information is integrated and enabled by business analytics is still on the horizon for many companies. We'll take a look at emerging capabilities to create a tax portal using the integration capabilities of Microsoft Office 365.

Teresa Peacock, Sean Trahan | *PricewaterhouseCoopers LLP*

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