



Summer Financial Reporting Series / June 9-10, 2021

Summer Financial Reporting Series

PLANNING COMMITTEE:

James A. Kennedy
International President, TEI

Mitchell S. Trager
Chair, TEI's Continuing Education Committee

Chris Anderson
Chair, TEI's Financial Reporting Committee

A. Pilar Mata
Director of Operations, TEI

W. Patrick Evans
Chief Tax Counsel, TEI

Dear Colleague:

Please join us June 9-10, 2021, for TEI's **Summer Financial Reporting Series**, a streamlined, virtual rendition of TEI's wildly popular Financial Reporting Seminar. Leaders of our Financial Reporting Committee hand-selected six impactful sessions covering a variety of advanced technical topics and operational issues, which will be presented by leading practitioners in the United States and Europe. To minimize interference with your daily routine, the event will be delivered over two days—three sessions per day—using the easily accessible Zoom platform. We look forward to your participation and thank you for your support.

Chris Anderson
Facebook, Inc.
Chair, TEI's Financial Reporting Committee



Summer Financial Reporting Series

Time (ET)

WEDNESDAY, JUNE 9

11:00 - 11:15 am

Welcome & Opening Remarks

Chris Anderson | *Chair, TEI's Financial Reporting Committee | Facebook, Inc.*

11:15 am - 12:30 pm

Navigating the Financial Reporting Impacts of the Administration's Tax Reform Proposals and the OECD's Pillar 1 and 2 Negotiations **A**

Kelley Mendonca, Moderator | *Amazon.com, Inc.*

Dallas Dolen, Rick Levin, Andrea Peretz | *PricewaterhouseCoopers LLP*

12:45 - 2:00 pm

Accounting for International Operations **A**

Cormac Fitzpatrick, Moderator | *Autodesk Inc.*

Pete DeVisser, Pablo Martinez | *Ernst & Young LLP*

2:15 - 3:30 pm

Tax and Financial Accounting Aspects of Acquiring, Holding, and Disposing of Cryptocurrency **A**

Amy Chan, Moderator | *Facebook, Inc.*

Rebecca Lee | *PricewaterhouseCoopers LLP*

Sean Prince | *Crowe LLP*

THURSDAY, JUNE 10

11:00 am - 12:15 pm

Environmental, Social, and Governance (ESG) Reporting Trends

Mike Manuel, Moderator | *Texas Instruments Incorporated*

Soren Dalby, Brett Weaver, Matthew Whipp | *KPMG LLP*

12:30 - 1:45 pm

Tax Auditor Interactions Best Practices

Dave Stevens, Moderator | *Cook Inlet Region, Inc.*

Chris Anderson | *Chair, TEI's Financial Reporting Committee | Facebook, Inc.*

Adam Bean | *Ernst & Young LLP*

2:00 - 3:15 pm

Data Strategy Trends and Best Practices

James Rinella, Moderator | *Google LLC*

Kathleen Harrott | *CSC Corptax*

Warren Jagger | *Thomson Reuters*

Amit Ringshia | *KPMG LLP*

John Simmons | *PricewaterhouseCoopers LLP*



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CPE CREDIT INFORMATION

This series will offer up to 9 hours of live, internet-based Continuing Professional Education ("CPE"). CPE credit will be offered only for live sessions; on-demand viewing of recorded sessions will not qualify for CPE.

In order to qualify for CPE credit, participants must attend one or more live sessions and answer the requisite number of polling questions.

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, or for questions related to this or other TEI events please contact TEI, directly, at 202.638.5601.

Sponsor Organization:	Tax Executives Institute, Inc. TEI Education Fund, 1200 G. Street, NW, Suite200, Washington, DC 20005
Date(s)	June 9-10, 2021
Delivery Method	Live, Internet-based
Program Level	Basic
Fields of Study	Taxes, Accounting
Learning Objective	This series is designed for individuals with less than five years' experience in federal income tax matters and will cover the four fundamental subject areas of greatest mutual importance to rising in-house tax professionals across the industry spectrum.
Prerequisite	No prerequisites.
Advanced Preparation	No advanced preparation required.
CPE Credit	9.0 Total (based on a 50-minute hour).
A Accounting Credit	4.5 (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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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)

- \$200 Member Fee
- \$250 Non-Member Fee
- \$100 Associate Member/ Member-in-Transition/ Member Emeritus

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REGISTRATION FORM

Fee covers course materials and other items specified in course 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 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.

Name_____

Nickname for Badge_____

Company_____

Mailing Address_____

City_____

State/Province_____ Zip/Zone_____

Telephone_____ Fax_____

Email_____

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.

Cancellations: All cancellations must be made in writing by 4:00 pm ET on June 7, 2021, and will be subject to an administrative service charge of \$25 (U.S.); for cancellations after June 7, 2021 and for no-shows, no refunds will be given. TEI's Federal Taxpayer ID Number is 52-0239291.

Substitutions: There will be a \$15 charge for substitutions (plus any fee differential), please email change request to meetings@tei.org.



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GENERAL INFORMATION

Eligibility

This course 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.

Format

This course will feature a combination of lectures and open discussions. Detailed outlines of each session and other supplementary materials will be provided to students upon their arrival. Pens, pencils, highlighters, and notepaper will not be provided. Casual attire is suitable for all educational sessions and other functions. The classrooms are air conditioned, so a light sweater may be appropriate.

Applications

Enrollment is limited and registrations will be accepted on a first-come, first-served basis. Applicants are encouraged to register at www.tei.org. The application should be typed; if TEI is unable to read the application, its processing may be delayed. Use of the U.S. Postal Service's overnight mail is acceptable. Other overnight mail services (such as FedEx) will not deliver to TEI's P.O. Box. Because of TEI's lockbox procedures, applications should not be sent to TEI's street address.

Students will receive an email confirmation upon their acceptance to the course. Should maximum enrollment be reached and TEI cannot accept your application, you will be notified immediately. If neither type of notice is received within two weeks of the date the course begins, it should be assumed that the application was not received by TEI.

An application 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 email:

Scan and send completed registration form with credit card to **meetings@tei.org**.

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

Cancellations: All cancellations must be made in writing by 4:00 pm ET on June 7, 2021, and will be subject to an administrative service charge of \$25 (U.S.); for cancellations after June 7, 2021 and for no-shows, no refunds will be given. To cancel or substitute a registrant please send an email to meetings@tei.org. In the event of cancellation or over-subscription of the conference, TEI's liability is limited to the return of the registrations fee. TEI's Federal Taxpayer ID Number is 52-0239291.

Substitutions: There will be a \$15 charge for substitutions (plus any fee differential), please email change request to meetings@tei.org.

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.