



Federal Tax Virtual Series / June 8-9 / June 15-16 / June 22-23 / June 29-30

## 2021 Federal Tax Fundamentals

A Virtual Series for Emergent In-house Tax Professionals

### PLANNING COMMITTEE:

James A. Kennedy  
*International President, TEI*

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

Julia Lagun  
*Chair, TEI's Federal Tax Committee*

Katherine C. Castillo  
*Member Emerita, TEI's Federal Tax Committee*

A. Pilar Mata  
*Executive Director, TEI*

Watson M. McLeish  
*Tax Counsel, TEI*

Beginning on Tuesday, June 8, TEI's Education Fund will sponsor a brand-new educational offering, *Federal Tax Fundamentals – A Virtual Series for Emergent In-house Tax Professionals*. The series, which is designed for individuals with less than five years' experience in federal income tax matters, will feature a best-in-class faculty and an interactive online learning environment.

This new virtual series will cover the four fundamental subject areas of greatest mutual importance to rising in-house tax professionals:

1. Overview of the Taxation of Corporations and Shareholders
2. Income Tax Accounting – Methods, Periods, and Hot Topics
3. Capital Asset Recovery – Depreciation, Amortization, Gain, and Loss
4. Fundamentals of Financial Accounting for Income Taxes (ASC 740-10)

Each week in June, two 120-minute virtual training sessions will be devoted to covering one of these subject areas over two consecutive days—on Tuesday and Wednesday afternoons. TEI members may register for and attend the full series (16 hours of CPE credit) for only \$250 or select an à-la-carte option of any two-session subject area (4 hours of CPE credit) for \$100. For non-members, the registration fees are \$350 for the full series or \$150 for the à-la-carte option. TEI will offer a 15% group discount on the fourth and subsequent full-series registrations from an organization. Enter FEDTEAM in the discount code field during registration.

Practical, succinct, and reasonably priced—hallmarks of a TEI educational program—this new virtual series will feature an outstanding faculty who will share their practical insights and experiences with attendees. TEI is confident that participants will find the series relevant, intellectually challenging, and professionally rewarding.

The substantive programming, presenter, and other details of this new series are provided in the accompanying brochure, including registration procedures and complete pricing details.



# 2021 Federal Tax Fundamentals

Time (ET)

1:00 - 1:05 pm

## TUESDAY, JUNE 8

### **Welcome & Introductory Remarks**

Shiukay Hung | *Vice-Chair, TEI's Federal Tax Committee* | *Tishman Speyer Properties*

1:05 - 3:00 pm

### **Overview of the Taxation of Corporations and Shareholders (Part 1)**

Brandon M. King, Matthew S. Mauney, Dominic Reilly | *Baker & McKenzie LLP*

## WEDNESDAY, JUNE 9

1:00 - 3:00 pm

### **Overview of the Taxation of Corporations and Shareholders (Part 2)**

Young-Eun Choi, Richard J. Fink, Matthew S. Mauney | *Baker & McKenzie LLP*

## TUESDAY, JUNE 15

1:00 - 1:05 pm

### **Welcome & Introductory Remarks**

Katherine C. Castillo | *Member Emerita, TEI's Federal Tax Committee*

1:05 - 3:00 pm

### **Income Tax Accounting – Methods, Periods, and Hot Topics (Part 1)**

Ellen McElroy, Mary Kate Nicholson, Michael D. Resnick | *Eversheds Sutherland (US) LLP*

## WEDNESDAY, JUNE 16

1:00 - 3:00 pm

### **Income Tax Accounting – Methods, Periods, and Hot Topics (Part 2)**

Ellen McElroy, Mary Kate Nicholson, Michael D. Resnick | *Eversheds Sutherland (US) LLP*

## TUESDAY, JUNE 22

1:00 - 1:05 pm

### **Welcome & Introductory Remarks**

Julia Lagun | *Chair, TEI's Federal Tax Committee* | *Comerica Incorporated*

1:05 - 3:00 pm

### **Capital Asset Recovery – Depreciation, Amortization, Gain, and Loss (Part 1)**

Joe Green, Gregory A. Lameti | *Deloitte Tax LLP*

## WEDNESDAY, JUNE 23

1:00 - 3:00 pm

### **Capital Asset Recovery – Depreciation, Amortization, Gain, and Loss (Part 2)**

Joe Green, Gregory A. Lameti | *Deloitte Tax LLP*

## TUESDAY, JUNE 29

1:00 - 1:05 pm

### **Welcome & Introductory Remarks**

Katherine C. Castillo | *Member Emerita, TEI's Federal Tax Committee*

1:05 - 3:00 pm

### **Fundamentals of Financial Accounting for Income Taxes (ASC 740-10) (Part 1)** A

Kristy Macera, Nola Showers | *Grant Thornton LLP*

## WEDNESDAY, JUNE 30

1:00 - 3:00 pm

### **Fundamentals of Financial Accounting for Income Taxes (ASC 740-10) (Part 2)** A

Kristy Macera, Nola Showers | *Grant Thornton LLP*



# 2021 Federal Tax Fundamentals

## CPE CREDIT INFORMATION



This series will offer up to 16 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](http://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:

Date(s)

Delivery Method

Program Level

Fields of Study

Tax Executives Institute, Inc. TEI Education Fund, 1200 G. Street, NW, Suite200, Washington, DC 20005

June 8-9, 2021; June 15-16, 2021; June 22-23, 2021; and June 29-30, 2021

Live, Internet-based

Basic

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

**16.0** Total (based on a 50-minute hour).

**A** Accounting Credit

**4.0** (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.



# 2021 Federal Tax Fundamentals

## REGISTRATION FORM

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



### 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)

#### ENTIRE SERIES

(16 hours of CPE Credit)

☐ \$250 TEI Members

☐ \$350 Non-Members

#### À LA CARTE OPTION

(4 hours of CPE Credit for any two-session subject area)

☐ \$100 TEI Members

☐ \$150 Non-Members

TEI will offer a 15% group discount on the fourth or subsequent full-series registrations from an organization. Enter **FEDTEAM** in the discount code field during registration.

Discount Code

#### À LA CARTE SESSIONS

(please choose the session(s) you would like to attend.)

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](http://www.tei.org). Credit card registrations may be scanned and emailed to: [meetings@tei.org](mailto: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](mailto:meetings@tei.org).

Name\_\_\_\_\_

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\_\_\_\_\_

This form can be scanned and emailed to [meetings@tei.org](mailto:meetings@tei.org).

**Cancellations:** All cancellations must be made in writing by 4:00 pm ET on June 4, 2021, and will be subject to an administrative service charge of \$25 (U.S.). No refunds will be made for cancellations received after June 4, 2021 and for no-shows. To cancel please send an email [meetings@tei.org](mailto:meetings@tei.org). In the event of cancellation or over-subscription of the conference, TEI's liability is limited to the return of the registration 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](mailto:meetings@tei.org).

If more than one session is marked you will be charged 2xs the fee indicated under **À LA CARTE OPTION** since each session listed below counts as two-sessions [4 CPE credits].

☐ Overview of the Taxation of Corporations and Shareholders - Parts 1 & 2 (June 8 & 9)

☐ Income Tax Accounting – Methods, Periods, and Hot Topics - Parts 1 & 2 (June 15 & 16)

☐ Capital Asset Recovery – Depreciation, Amortization, Gain, and Loss - Parts 1 & 2 (June 22 & 23)

☐ Fundamentals of Financial Accounting for Income Taxes (ASC 740-10) - Parts 1 & 2 (June 29 & 30)



# 2021 Federal Tax Fundamentals

## 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](http://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:



By mail:



By email:

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

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

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 4, 2021, and will be subject to an administrative service charge of \$25 (U.S.). No refunds will be made for cancellations received after June 4, 2021 and for no-shows. To cancel please send an email [meetings@tei.org](mailto: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. 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](mailto: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](mailto:meetings@tei.org).