



Federal Tax Course - Level 1 Simulive Edition (2022) | January 9 - February 28, 2023 | Virtual Seminar

## Federal Tax Course - Level 1 Simulive Edition (2022)

### PLANNING COMMITTEE:

**Wayne G. Monfries**  
International President, TEI

**Sandhya Edupuganty**  
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

For more than 40 years, TEI's courses have been a cornerstone in the training of rising corporate tax professionals.

The Federal Tax Course – Level 1 builds upon the Institute's success in educating tax professionals on the fundamentals, challenges, and opportunities present in federal taxation.

Designed for in-house tax professionals with five or fewer years of experience and those seeking a refresher or cross-training, the course covers the central concepts of U.S. taxation, including sessions addressing:

- Income Tax Accounting – Methods, Periods, and Hot Topics
- State Corporate Income Tax Compliance – A Framework
- Capital Asset Recovery (Depreciation, Amortization, Gain, and Loss)
- Tax Treatment of Research and Experimental Expenditures
- Fundamentals of U.S. International Taxation
- And more

The sessions feature a world-class faculty, and a practical and succinct perspective presented in a virtual "Simulive Edition" of the in-person Federal Tax Course – Level 1, which was conducted in 2022. We are airing the sessions in a Simulive format, which means we will replay the recorded sessions from the in-person course and will have session speakers on hand to answer questions through chat and live Q&A. Each Simulive session will qualify for CPE credit depending on length of session, with a maximum total of 33 CPE hours offered.

Federal Tax Course – Level 1 Simulive Edition registrants will also receive on-demand access to the recorded sessions at the conclusion of the Simulive seminar on February 28, 2023. Please note that CPE is not available for on-demand viewing of the sessions.



# Federal Tax Course - Level 1 Simulive Edition

## Time (ET)

### Monday, January 9

11:00 am - 12:15 pm  
1:00 - 2:15 pm

Overview of the Taxation of Corporations and Shareholders  
Nicholas Gruidl | Partner, RSM US LLP

### Tuesday, January 10

11:00 am - 12:15 pm  
1:00 - 2:15 pm

Overview of the Taxation of Corporations and Shareholders (Cont'd)  
Nicholas Gruidl | Partner, RSM US LLP

### Tuesday, January 17

11:00 am - 12:15 pm  
1:00 - 2:15 pm

Income Tax Accounting – Methods, Periods, and Hot Topics  
Mary Kate Nicholson | International Tax Senior Manager, Eversheds Sutherland (US) LLP  
Michael Resnick | Associate, Eversheds Sutherland (US) LLP

### Wednesday, January 18

11:00 am - 12:15 pm  
1:00 - 2:15 pm

Income Tax Accounting – Methods, Periods, and Hot Topics (Cont'd)  
Mary Kate Nicholson | International Tax Senior Manager, Eversheds Sutherland (US) LLP  
Michael Resnick | Associate, Eversheds Sutherland (US) LLP



# Federal Tax Course - Level 1 Simulive Edition

## Time (ET)

### Monday, January 23

11:00 am - 12:15 pm

Fundamentals of Financial Accounting for Income Taxes (ASC 740-10)

1:00 - 2:15 pm

Nola Showers | Partner, Tax, Grant Thornton LLP

Garrett Van Houtteghem | Senior Tax Manager, Grant Thornton LLP

### Tuesday, January 24

11:00 am - 12:15 pm

Fundamentals of Financial Accounting for Income Taxes (ASC 740-10) (Cont'd)

1:00 - 2:15 pm

Nola Showers | Partner, Tax, Grant Thornton LLP

Garrett Van Houtteghem | Senior Tax Manager, Grant Thornton LLP

### Monday, January 30

11:00 am - 12:30 pm

Taxation of Financial Instruments & Hedging

Menna Eltaki | Managing Director, National Tax, Ernst & Young LLP

Bob Leonard | Senior Manager, Ernst & Young LLP

### Tuesday, January 31

11:00 am - 12:15 pm

State Corporate Income Tax Compliance – A Framework

1:00 - 2:15 pm

Jasmin Desai | Manager of Technical Accounting and SEC Reporting,

PricewaterhouseCoopers LLP

Daniel De Jong | Senior Manager, KPMG LLP



# Federal Tax Course - Level 1 Simulive Edition

## Time (ET)

11:00 am - 12:15 pm  
1:00 - 2:15 pm

### Monday, February 6

Capital Asset Recovery (Depreciation, Amortization, Gain, and Loss)  
Joe Green | Partner, Deloitte Tax LLP  
Gregory Lameti | Senior Tax Manager, Deloitte Tax LLP

### Tuesday, February 7

11:00 am - 12:15 pm  
1:00 - 2:15 pm

Tax Treatment of Research and Experimental Expenditures  
Stacey Hicks | Senior Manager, Tax, Deloitte Tax LLPP  
Christopher Makris | Managing Director, Tax, Deloitte Tax LLP

### Monday, February 13

11:00 am - 12:45 pm

Uniform Capitalization/Inventory Accounting Rules  
Eric Lucas | Principal, KPMG LLP  
Kevin Eidsmo | Manager, Tax, KPMG LLP

### Tuesday, February 14

11:00 am - 12:15 pm  
1:00 - 2:15 pm

Taxation of Employee Benefits  
Mary Hevener | Partner, Morgan, Lewis & Bockius LLP  
Steven Johnson | Partner, Morgan, Lewis & Bockius LLP



# Federal Tax Course - Level 1 Simulive Edition

## Time (ET)

11:00 am - 12:15 pm  
1:00 - 2:15 pm

### Thursday, February 21

Introduction to Partnership Taxation

Jennifer Hicks | Managing Director, Alvarez & Marsal Taxand, LLC  
Jeffrey Gerarde | Senior Director, Alvarez & Marsal Taxand, LLC

### Thursday, February 22

11:00 am - 12:15 pm

Introduction to Partnership Taxation (Cont'd)

Jennifer Hicks | Managing Director, Alvarez & Marsal Taxand, LLC  
Jeffrey Gerarde | Senior Director, Alvarez & Marsal Taxand, LLC

### Friday, February 27

11:00 am - 12:15 pm  
1:00 - 2:15 pm

Fundamentals of U.S. International Taxation

Samuel Pollack | Partner, Global Tax Practice, Baker McKenzie LLP  
Emily Berg | Associate, Global Tax Practice, Baker McKenzie LLP  
Brian Houlihan | Associate, Global Tax Practice, Baker McKenzie LLP

### Friday, February 28

11:00 am - 12:15 pm

Fundamentals of U.S. International Taxation (Cont'd)

Samuel Pollack | Partner, Global Tax Practice, Baker McKenzie LLP  
Emily Berg | Associate, Global Tax Practice, Baker McKenzie LLP  
Brian Houlihan | Associate, Global Tax Practice, Baker McKenzie LLP



# Federal Tax Course - Level 1 Simulive Edition

## GENERAL INFORMATION

### Registration Fees

Simulive attendees may register for all 11 Simulive sessions ([Full Session Bundle](#)), or they may select individual sessions for purchase. Individual sessions are not eligible for discount.

	TEI Member	Non-Member
<a href="#">Full Session Bundle</a>	\$950	\$1,150
<a href="#">Individual Sessions</a>	\$150	\$250

### Registrations

The Federal Tax - Level 1 Course - Simulive Edition is open to members of TEI and other in-house tax professionals, as well as individuals working for TEI sponsoring firms. Governmental employees are ineligible to attend.

### Format

These Simulive sessions were recorded at the 2022 Federal Tax Course - Level 1 and will be re-aired with live subject matter experts to answer questions from registrants. There will be attendance popups throughout the sessions to ensure active participation.



### By web:

<https://www.tei.org/events-education/events/2023-federal-tax-course-level-1-simulive-edition>  
You must log in before registering.



### By mail:

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



### By fax:

202.638.5607. Credit card registrations only.



### By email:

Scan and send completed registration form with credit card information to [meetings@tei.org](mailto:meetings@tei.org).

### Cancellation and Substitution Policy

All cancellations must be received in writing by January 6, 2023 at [meetings@tei.org](mailto:meetings@tei.org). Cancellations will be subject to a \$50 cancellation fee. There are no partial refunds if you can only attend some of the sessions. Substitutions may be made prior to the start of the series; however, there are no partial registrations or sharing of registration for CPE purposes. Substitutions requests should be emailed to [meetings@tei.org](mailto:meetings@tei.org) and are subject to a \$25 fee.

TEI's liability is limited to the return of the registration fee.  
TEI's Federal Taxpayer ID Number is 52-0239291.

If you have any questions or concerns leading up to the sessions, please contact [meetings@tei.org](mailto:meetings@tei.org).



# Federal Tax Course - Level 1 Simulative Edition

## GENERAL INFORMATION - CONTINUED

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. To request information on whether you might qualify, please contact us at <a href="mailto:meetings@tei.org">meetings@tei.org</a> .
Questions?	Call TEI at 202.638.5601, email <a href="mailto:meetings@tei.org">meetings@tei.org</a> or visit <a href="http://www.tei.org">www.tei.org</a> . Click on "Events & Education."
CPE Credit Information	Tax Executives Institute Education Foundation is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of "Internet live" continuing professional education on the National Registry of CPE Sponsors.
Date	January 9, 2023 – February 28, 2023
Delivery Method	Internet Live
Program Level	Overview
Field of Study	Taxes
Prerequisite	None
Advanced Preparation	No advanced preparation required.
CPE Credit	Approximately 33.0 credits based on a 50-minute hour.
Disclaimers	State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. To submit a complaint about a specific program, speaker or content, please email <a href="mailto:meetings@tei.org">meetings@tei.org</a> . Complaints regarding sponsors may be addressed to National Registry of CPE Sponsors, 150 Fourth Avenue North, Ste. 700, Nashville, TN 37219-2417. Website: <a href="http://www.nasbaregistry.org">www.nasbaregistry.org</a>





Connect. Engage. Impact.

**ELIGIBILITY**

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**REGISTRATION FEES**

(in U.S. \$)

FULL COURSE  
(ALL SESSIONS)

\$950 Member

\$1,150 Non-Member

INDIVIDUAL SESSIONS  
(NOT ADDITIVE FOR A DISCOUNT)

\$150 Member

\$250 Non-Member

Overview of the Taxation of Corporations and Shareholders

Income Tax Accounting – Methods, Periods, and Hot Topics

Fundamentals of Financial Accounting for Income Taxes (ASC 740-10)

Taxation of Financial Instruments & Hedging

State Corporate Income Tax Compliance – A Framework

Capital Asset Recovery (Depreciation, Amortization, Gain, and Loss)

Tax Treatment of Research and Experimental Expenditures

Uniform Capitalization/Inventory Accounting Rules

Taxation of Employee Benefits

Introduction to Partnership Taxation

Fundamentals of U.S. International Taxation

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## REGISTRATION FORM

Applications will be accepted on a first-come, first-served basis. Registrants 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 registrations 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

All cancellations must be received in writing by January 6, 2023 at [meetings@tei.org](mailto:meetings@tei.org). Cancellations will be subject to a \$50 cancellation fee. There are no partial refunds if you can only attend some of the sessions. Substitutions may be made prior to the start of the series; however, there are no partial registrations or sharing of registration for CPE purposes. Substitutions requests should be emailed to [meetings@tei.org](mailto:meetings@tei.org) and are subject to a \$25 fee.

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