



Tax Technology Seminar / May 2-3, 2022 / San Francisco Marriott Marquis

2022 Tax Technology Seminar

PLANNING COMMITTEE:

Mitchell S. Trager
International President, TEI

Rita Makaris
Chair, TEI's Corporate Tax Management Committee

Cheria Coram
Chair, TEI's Technology Subcommittee

A. Pilar Mata
Executive Director, TEI

Todd A. Lard
Tax Counsel, TEI

The past two years have highlighted the importance of a nimble tax function—whether remote or in person—that can operate seamlessly with tight controls, streamlined data integrity, and effective collaboration and communication regardless of physical location. TEI's fourth annual Tax Technology Seminar, taking place May 2-3, 2022, provides a forum for tax professionals to share ways to effectively address these pressing needs.

The 2022 Tax Technology Seminar will survey the strategy, trends, and tools in technology and automation to elevate the tax function—including the sophisticated processing of data, ranging from ETL and data automation tools, to tools that address processes for specific topics.

Participants will learn about the latest developments in tax technology and automation that help tax professionals tackle a landscape of evolving markets, complex operations, and rapid business changes. These important topics will be addressed in the context of the evolution of tax technology, which has never been more relevant as companies prepare for the future.

TEI's 2022 Tax Technology Seminar is designed to facilitate the interactivity, engagement, and networking opportunities that made prior seminars a resounding success. The seminar will also feature a hands-on exhibit hall to allow participants to experience new technology tools and a member-only forum to share best practices and pitfalls faced by in-house tax professionals. As an added bonus, all sessions will be recorded and available for on-demand playback following the seminar, enabling attendees to view concurrent breakout sessions after the event.



2022 Tax Technology Seminar

Time (PT)

SUNDAY, MAY 1

5:00 - 7:00 PM

Registration – Golden Gate Ballroom Foyer

Time (PT)

MONDAY, MAY 2

DAY 1

7:00 - 7:00 PM

Registration – Golden Gate Ballroom Foyer

7:00 - 8:15 AM

Continental Breakfast – Golden Gate Ballroom C

8:00 - 8:15 AM

Welcome & Introductory Remarks

Cheria Coram | *Starbucks Coffee Company*

Mitchell S. Trager | *TEI International President*

Pilar Mata | *Tax Executives Institute*

8:15 - 9:15 AM

PLENARY: *The Intersection of People, Process & Technology: Where Are We Now?*

Charlotte Flynn | *Deloitte Tax LLP*

John Bennecke | *True Partners Consulting*

Raquel Guevara | *Microsoft Corporation*

Vikesh Patel | *The Home Depot*

Sara Mendiola | *LyondellBasell*

9:15 - 9:30 AM

Break

9:30 - 10:30 AM

BREAKOUT SESSIONS

Don't Touch that Data! Leveraging API Integrations to Automate Data Transfer

Daphne Cheok, Moderator | *Getty Images*

Michelle Roden | *Interstate Batteries*

Neal Schneider | *Crowe LLP*

Eric Ziemann | *CSC Corptax*

Automating Tax Credits and Incentives for Improved Compliance and Accuracy

Mitchell S. Trager, Moderator | *TEI International President*

Nick Panko | *CFO Services*

10:30 - 11:00 AM

Sponsored Break

11:00 AM - 12:00 PM

BREAKOUT SESSIONS

The Dell Tax Automation Journey – Powered by Citizens Developers and Intelligent Automation Tools

Kimberly Deeb, Santhosh Kumar Lalgudi, Eric Romanoff | *Ernst & Young LLP*

Luis Perez | *Dell*

Artificial Intelligence & the Partnership Schedule K-1

Michael Renwick | *Thomson Reuters*

Neal Schneider | *Crowe LLP*

12:00 - 1:00 PM

Networking Lunch (lunch will be provided)

A Conversation with Kaschit Pandya, Chief Information Officer, IT Operations, Internal Revenue Service

Brian Kaufman, Moderator | *CapitalOne Financial Corporation*

Kaschit Pandya | *Internal Revenue Service*



2022 Tax Technology Seminar

Time (PT)
1:00 - 2:00 PM

DAY 1 (CONTINUED)

BREAKOUT SESSIONS

Automating on a Budget: Building the Business Case for a Phased Approach

Danielle Beluch, Moderator | *The Chemours Company*

Robert Heath, Andrew Stoker | *BrandSafway*

Mindy McGlaughlin, Kelly Necessary | *Dixon Hughes Goodman LLP*

Using Data and Tech to Further U.S. International Tax Modeling

Mark Gasbarra | *Forte International Tax*

George Salis | *Vertex, Inc.*

Stephanie Walsh | *Levi Strauss & Co.*

2:00 - 2:15 PM

Break

2:15 - 3:15 PM

BREAKOUT SESSIONS

Powering Tax Transformation with Technology

Jack Fick, Moderator | *EDF, Inc.*

Danielle Gonzalez | *RSM US LLP*

Tina Elenberger | *Allied Universal*

Kara Roe | *Empower Retirement*

State Apportionment – Common Data Challenges and Workarounds

Vikesh Patel, Moderator | *The Home Depot*

Kim Capizzi, Spencer Orlin | *BDO USA*

3:15 - 3:45 PM

Sponsored Break

3:45 - 4:45 PM

BREAKOUT SESSIONS

Predictive Analytics for Tax

Sara Mendiola, Moderator | *LyondellBasell*

Amit Ringshia | *KPMG LLP*

Carol Liu | *Meta Platforms, Inc.*

Chris Zou | *Google*

What to Know After Implementing a Sales Tax Technology Solution

Daphne Cheok, Moderator | *Getty Images*

Brian Smith | *Avalara*

Chris Vignone | *PMBA*

4:45 - 5:00 PM

Break

5:00 - 6:00 PM

PLENARY: Emerging Technology Panel – Perspectives from Incubation Leaders

Danielle Beluch, Moderator | *The Chemours Company*

Liz Armbruester | *Avalara*

Satnam Singh | *Thomson Reuters*

Jamie Eagan | *insightsoftware*

Sal Visca | *Vertex, Inc.*

Nick Frank | *Bloomberg Industry Group*

Eric Williams | *CSC Corptax*

6:00 - 7:00 PM

Networking Reception – sponsored by *PricewaterhouseCoopers LLP*



2022 Tax Technology Seminar

Time (PT)

TUESDAY, MAY 3

DAY 2

7:00 - 5:00 PM

Registration – Golden Gate Ballroom Foyer

7:00 - 8:15 AM

[Continental Breakfast](#) – Golden Gate Ballroom C

8:15 - 9:15 AM

BREAKOUT SESSIONS

AI – Beyond the Hype

Yi Liu, Troy Maikowski, Ivan Roussev | *Ernst & Young LLP*

Managing Your Global Tax Footprint Using Data Exchange and Analytics Tools

Sara Mendiola, Moderator | *LyondellBasell*

Brandon Joseph, Mark Pociask | *Grant Thornton LLP*

9:15 - 9:30 AM

Break

9:30 - 10:30 AM

BREAKOUT SESSIONS

Evolving Trends of the Tax Automation Op Model

Justin Femmer, Allison LeClair | *PricewaterhouseCoopers LLP*

Automating the Use Tax Function

Jack Fick, Moderator | *EDF, Inc.*

David Hillegass | *Global Tax Management*

Brian Strachman | *Alteryx*

10:30 - 11:00 AM

Sponsored Break

11:00 AM - 12:00 PM

BREAKOUT SESSIONS

Driving Tax Digital Transformation with Microsoft Power Apps and Power Automate

Amit Ringshia, Karen Li | *KPMG LLP*

Charles Gautier, Clara Parra Espinosa | *Microsoft Corporation*

The Role of Technology in Adopting BEPS 2.0

Steve Cullimore, Haley Dobre | *BDO USA*

Jamie Eagan | *insightsoftware*

12:00 - 1:00 PM

[Networking Lunch](#) (lunch will be provided)

1:00 - 2:00 PM

BREAKOUT SESSIONS

Centralized Tax Data - Getting Your Data to Work for You

Amit Ringshia, Stephen Chung | *KPMG*

Carol Liu | *Meta*

Justin Femmer, Hadley Leach, Shani Washington | *PricewaterhouseCoopers LLP*

Jessica Hughes | *Mohawk Industries*

Migrating Tax to the Cloud: Best Practices for Tax and IT Leaders

Kelley Lear, Jennever Pelaez | *Thomson Reuters*

Elvira Wallis | *SAP*

Amr Elmeleegy | *AWS*



2022 Tax Technology Seminar

Time (PT)	
2:00 - 2:15 PM	Break
2:15 - 3:15 PM	BREAKOUT SESSIONS <i>Executive Reporting & Analytics – Unleash the Power of Your Data</i> Danielle Beluch, Moderator <i>The Chemours Company</i> Mark Guevin <i>Crowe LLP</i> <i>The New Tax Data Hub: Changing the Data Experience for Tax</i> RJ Littleton <i>Deloitte Tax LLP</i> Luis Perez <i>Dell</i>
3:15 - 3:45 PM	Sponsored Break
3:45 - 4:45 PM	PLENARY: <i>Leading Technology Transformation for Tax: What's Next?</i> Justin Femmer, Moderator <i>PricewaterhouseCoopers LLP</i> Clara Parra Espinosa <i>Microsoft Corporation</i> Vikesh Patel <i>The Home Depot</i> Ayrin Santoso <i>Google</i> Grace Palisoc <i>Costco Wholesale Corporation</i>
4:45 - 5:00 PM	Break
5:00 - 6:00 PM	MEMBERS ONLY FORUM: <i>Tax Technologist Meet Up - Idea & Experience Sharing</i> Hear from your peers and share experiences, challenges, recent efforts and what's next in tech-enabled transformation, and expand your tax technologists community at this forum. Open to TEI Members and Member-eligible only.



2022 Tax Technology Seminar



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	May 2-3, 2022 (ET)
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	13.0 (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.

ACCOMMODATIONS

TEI has secured a discounted block of rooms at the San Francisco Marriott Marquis Hotel for seminar registrants at the rate of \$249 + tax per night. To make your reservation, please call 415.896.1600 and say you are with the "TEI Tax Technology Seminar". TEI's discounted room block is limited and will likely sell out prior to our April 10, 2022 cutoff date when remaining rooms will be released back to the hotel for resale and prevailing rates will apply. Make your reservations today.

Hotel Address:
San Francisco Marriott Marquis Hotel
780 Mission Street
San Francisco, CA 94103



2022 Tax Technology Seminar

COVID-19 SAFETY PROTOCOLS

TEI is pleased to welcome the in-house tax professional community back to in-person events! Our top priority remains the health and safety of our attendees, sponsors, speakers, and staff. By observing COVID-19 safety guidelines established by San Francisco and the Centers for Disease Control and Prevention, we believe that we, along with our partners at the San Francisco Marriott Marquis, can foster a safe, welcoming environment for our communities to share the experiences they rely on TEI to provide. Accordingly, attendees must agree to comply with all COVID-19 safety protocols established by TEI and the San Francisco Marriott Marquis.

As of April 1, San Francisco has aligned with the State of California's new guidance and no longer requires masks or proof of COVID-19 vaccination or a negative test to enter events. The city has stated it will continue to monitor public health data and that it maintains its authority to make any changes to local regulations, no matter what the State or other neighboring jurisdictions may choose to do.

Participants cannot attend the event if they are feeling unwell, have been in contact with someone who has tested positive for COVID-19 within seven days leading up to the event, or have displayed COVID-19 symptoms within 48 hours preceding the event. These symptoms may include fever or chills, coughing, shortness of breath, fatigue, muscle or body aches, headache, new loss of taste or smell, sore throat, congestion or runny nose, nausea or vomiting, and diarrhea. If you cannot attend the event for any of these reasons, TEI's staff will work with you to transfer your registration to the following year's event or provide a full refund, at the attendee's choice. If an attendee becomes unwell during an event, he or she should not reenter the event space, but rather should immediately inform a TEI staff member via telephone or email, and we will work with the San Francisco Marriott Marquis to isolate the individual and seek medical attention as needed. If an attendee becomes unwell within the five days following the event, please notify TEI immediately by emailing meetings@tei.org.



Connect. Engage. Impact.

2022 Tax Technology Seminar

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. Registrants 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.

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 _____

Company _____

Mailing Address _____

City _____

State/Province _____ Zip/Zone _____

Telephone _____ Fax _____

Email _____

FEES

Amount (U.S. Funds)

- \$950 Member Fee
- \$1,150 Non-Member Fee
- \$350 Member in Transition/Member Emeritus

Team Discount: If you are the 2nd or more registrant from the same organization take 25% off your registration fee above as our thanks. Online registrants use discount code - TEAM-22TTS

Primary Registrant: _____

Total Charge: _____

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.

Cancellation Policy: All cancellations must be made in writing by 4:00 pm ET on April 15, 2022, and will be subject to an administrative service charge of \$75 (U.S.); for cancellations after April 15, 2022 and before April 22, the charge will be \$200 (U.S.) No refunds will be made for cancellations received after April 22 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.

Substitution - To substitute someone please email meetings@tei.org with the name of the person you want to substitute someone for and the new person. There is a \$50 substitution fee, plus any member/non-member fee difference.

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. In accordance with section 274(n) of the Internal Revenue Code, registrants are notified that that the portion of the seminar registration fee attributable to food and beverage is \$400 (U.S.).



2022 Tax Technology Seminar Sponsors

SEMINAR SPONSORS

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