



2022 Tax Technology Simulive Seminar | August 16-September 1, 2022 | (12 bi-weekly sessions) | Virtual Seminar

2022 Tax Technology Simulive Seminar

PLANNING COMMITTEE:

Wayne Monfries
International President, TEI

Cheria Coram
Chair, TEI's Technology Subcommittee
Committee

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Executive Director, TEI

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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 **first ever Tax Technology Simulive Seminar** will broadcast 12 hand-picked sessions from our popular fourth annual Tax Technology Seminar (in-person event in May) and provide a forum for tax professionals to share ways to effectively address these pressing needs. The **Simulive** sessions will be broadcast bi-weekly between August 16 - September 1. Please visit our website to [register](#).

We are airing these sessions in a **Simulive** format, which means we will be replaying the recorded sessions from the seminar and have session speakers on hand to answer questions through chat and a live Q&A at the end of the session. In addition to the 12 **Simulive** sessions, attendees will receive on demand access to 11 more sessions (for a total of 23 sessions) that were recorded during the live Seminar.



2022 Tax Technology Simulive Seminar

Time (ET)

Tuesday, August 16 - Day 1

11:00 am - 12:15 pm

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

Charlotte Flynn | Deloitte

John Bennecke | True Partners Consulting

1:00 - 2:15 pm

Powering Tax Transformation with Technology

Danielle Gonzalez | RSM

Thursday, August 18 - Day 2

11:00 am - 12:15 pm

Driving Tax Digital Transformation with Microsoft Power Apps and Power Automate

Amit Ringshia | KPMG

Karen Li | KPMG

Clara Parra Espinosa | Microsoft Corporation

1:00 - 2:15 pm

Automating the Use Tax Function

David Hillegass | Global Tax Management

Tuesday, August 23 - Day 3

11:00 am - 12:15 pm

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

Kelly Necessary | Forvis

Mindy McGlaughlin | Forvis

1:00 - 2:15 pm

The Role of Technology in Adopting BEPS 2.0

Haley Dobre | BDO

Steve Cullimore | BDO



2022 Tax Technology **Simulive** Seminar

Time (ET)

Thursday, August 25 - Day 4

11:00 am - 12:15 pm

Centralized Tax Data – Getting Your Data to Work for You
Amit Ringshia | KPMG

1:00 - 2:15 pm

Predictive Analytics for Tax
Amit Ringshia | KPMG

Tuesday, August 30 - Day 5

11:00 am - 12:15 pm

Emerging Technology Panel - Perspectives from Incubation Leaders
Satnam Singh | Thomson Reuters

1:00 - 2:15 pm

AI – Beyond the Hype
Ivan Roussev | EY
Yi Liu | EY

Thursday, September 1 - Day 6

11:00 am - 12:15 pm

Evolving Trends of the Tax Automation Op Model
Justin Femmer | PwC

1:00 - 2:15 pm

Leading Technology Transformation for Tax: What's Next?
Justin Femmer | PwC



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As an added bonus, registration includes access to an additional 11 sessions that were recorded during the live seminar in May and available for on-demand playback (these 11 sessions are not CPE eligible).

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

Daphne Cheok | Getty Images

Michelle Roden | Interstate Batteries

Neal Schneider | Crowe, LLP

Eric Ziemann | CSC Corptax

Automating Tax Credits and Incentives for Improved Compliance and Accuracy

Nick Panko | CFO Services

Mitch Trager | TEI

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

Kimberly Deeb | EY

Santhosh Kumar Lalgudi | EY

Luis Perez | Dell

Eric Romanoff | EY

Artificial Intelligence & the Partnership Schedule K-1

Michael Renwick | Thomson Reuters

Neal Schneider | Crowe, LLP

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

Mark Gasbarra | Forte International Tax

George Salis | Vertex

Stephanie Walsh | Levi Strauss & Co



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State Apportionment - Common Data Challenges and Workarounds

Kimberly Capizzi | BDO

Spencer Orlin | BDO

Vikesh Patel | The Home Depot, Inc.

What to Know After Implementing a Sales Tax Technology Solution

Daphne Cheok | Getty Images

Brian Smith | Avalara

Chris Vignone | PMBA

Managing Your Global Tax Footprint Using Data Exchange and Analytics Tools

Brandon Joseph | Grant Thornton

Mark Pociask | Grant Thornton

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

Amr Elmeleegy | AWS

Kelley Lear | Thomson Reuters

Jennever Pelaez | Thomson Reuters

Elvira Wallis | SAP

Executive Reporting & Analytics - Unleash the Power of Your Data

Mark Guevin | Crowe, LLP

The New Tax Data Hub: Changing the Data Experience for Tax

RJ Littleton | Deloitte

Allison Matthews | Deloitte

Luis Perez | Dell



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GENERAL INFORMATION

Eligibility TEI's Tax Technology Series is open to TEI Members Only due to restrictions placed on us by some of our speakers. Unfortunately member-eligible non-members are prohibited from registering. If you would like to apply for membership or renew an prior TEI membership, please visit www.fei.org/membership/join.

Registration Registration is now open and will be accepted online, by mail, by fax, and by email.



By web: www.fei.org. You must log in 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 fax: [202.638.5607](tel:202.638.5607). Credit card registrations only.



By email: Scan and send completed registration form with credit card to meetings@fei.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.

Substitution Policy Substitutions will be permitted for registrants who are unable to attend the Seminar. To request a substitution, please email meetings@fei.org with the names of the registrant and his or her substitute. The substitution fee is \$50 per registrant.

Cancellation or Over-Subscription of the Seminar In the event the conference must be canceled or is oversubscribed, TEI's liability is limited to the subscription of the Seminar return of the registration fee.



2022 Tax Technology Simulive Seminar

GENERAL INFORMATION - CONTINUED

Financial Aid for Illinois Licensed Attorneys

Scholarships to defray tuition expense for this program are available for Illinois licensed attorneys (both TEI members and nonmembers) who are temporarily unemployed with a demonstrated financial hardship. Scholarships will be reviewed and provided 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 meetings@tei.org.

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.

Questions?

For more information regarding administrative policies such as complaint or refund, please contact, TEI, directly at [202.638.5601](tel:202.638.5601).

Date

August 16-September 1, 2022 (ET)

Delivery Method

Internet 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

12.0 credits (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.

Registration

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 paying 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.

Registration Fees (in U.S. \$)

\$595 Member Fee

Name

Company

Mailing Address

City

State/Province Zip/Zone

Telephone Fax

Email

Total Charge:

Charge to: VISA MasterCard American Express Discover Diners Club

Card Number

Primary Registrant:

Exp. Date CVV

Cardholder Name (print)

Signature

This form can be scanned and emailed to meetings@tei.org.

Cancellation - All cancellations must be received in writing by August 11, 2022 at 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.



2022 Tax Technology **Simulive** Seminar Sponsors

SEMINAR SPONSORS

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