

**TAX EXECUTIVES INSTITUTE, INC.**  
**2025 Annual Meeting of Members**  
**Hilton Lake Champlain – Burlington, VT**  
**August 10-12, 2025**

| <b>AGENDA</b>             |  |
|---------------------------|--|
| <b>Sunday, August 10</b>  |  |
| 8:45 a.m. – 9:00 a.m.     | <b>TEI Education Fund Meeting - Incoming Executive Committee Members</b>   |
| 9:00 a.m. – 12:00 p.m.    | <b>Executive Committee Meeting - Incoming &amp; Outgoing Executive Committee Members</b><br>(Executive Session from 11:30 a.m. - 12:00 p.m.)   |
| 12:00 p.m. – 1:30 p.m.    | <b>Executive Committee Luncheon - Incoming &amp; Outgoing Executive Committee Members</b>  |
| 1:45 p.m. – 4:00 p.m.     | <b>TEI Member Value Workshop - All Members</b>   |
| 5:30 p.m. – 7:00 p.m.     | <b>Welcome Reception - All Members &amp; Guests</b>  |
| 7:00 p.m. – 9:00 p.m.     | <b>Executive Committee &amp; Past International Presidents Dinner - Incoming &amp; Outgoing Executive Committee Members &amp; Past International Presidents</b>  |
| <b>Monday, August 11</b>  |  |
| 8:00 a.m. – 8:45 a.m.     | <b>Breakfast – All Members &amp; Guests</b>  |
| 8:45 a.m. – 12:00 p.m.    | <b>TEI Strategic Planning Workshop – All Members</b>   |
| 12:00 p.m. – 1:30 p.m.    | <b>Networking Luncheon - All Members</b>   |
| 1:30 p.m. – 5:30 p.m.     | <b>Annual Meeting of Members &amp; Board of Directors Meeting– All Members</b><br>(Executive Session 5:00-5:30)<br><i>Executive Committee then reconvenes to ratify decisions at August 10 Executive Committee and TEI Education Fund Meetings</i> |
| 5:30 p.m. - 6:00 p.m.     | <b>Break</b>   |
| 6:00 p.m. - 6:15 p.m.     | <b>Meet in Lobby for Social Outing</b>   |
| 6:30 p.m. – 9:00 p.m.     | <b>Social Outing &amp; Dinner - All Members &amp; Guests</b>   |
| <b>Tuesday, August 12</b> |  |
| 7:30 a.m. – 8:30 a.m.     | <b>Breakfast – All Members &amp; Guests</b>  |
| 8:30 a.m. – 10:00 a.m.    | <b>TEI Leader Roundtable – Chapter &amp; Committee Challenges - All Members</b>  |
| 10:00 a.m. - 10:15 a.m.   | <b>Break</b>   |
| 10:15 a.m. - 11:45 a.m.   | <b>TEI Member Roundtable Discussion – Tax Departments in an Era of Uncertainty - All Members</b>   |
| 11:45 a.m. - 12:30 p.m.   | <b>Networking Luncheon - All Members &amp; Guests</b>  |