



Connect. Engage. Impact.

2025 Tax Technology Seminar

Hyatt Regency Lake Washington at Seattle Southport

May 5 - 7, 2025

Program At A Glance

Sunday, May 4, 2025

5:00 PM - 6:30 PM **Welcome Meet & Greet**

Monday, May 5, 2025

7:00 AM - 6:30 PM **TEI Registration Desk Open**

7:00 AM - 8:15 AM **Continental Breakfast**

8:00 AM - 8:15 AM **Welcome & Introductory Remarks**

8:15 AM - 9:15 AM **Driving Transformation in Tax: Trends, Talent, and Technology**

9:15 AM - 9:30 AM **Break**

9:30 AM - 10:30 AM **Breakout Sessions**

Leveraging Technology to Respond to Regulatory Change

Power Platform Overview

9:30 AM - 12:00 PM **Hands-On Learning**

Automation Challengers! Unlock the Power of Connected Apps in Power Platform: Hands-On automation case competition - Part 1

Power Query in Excel (Beginner) - 2 hr AM training plus break

10:30 AM - 11:00 AM **Sponsored Break**

11:00 AM - 12:00 PM **Breakout Sessions**

OECD Pillar Two Reporting: The Now, Next and Tech

Tools and Techniques to Streamline Tax Processes

12:00 PM - 1:15 PM **Networking Lunch**

1:15 PM - 2:15 PM **Breakout Sessions**

Automating Sales and Use Tax

The Power of a Connected Platform: Fully Leveraging Microsoft Fabric and Copilot for Tax

1:15 PM - 3:45 PM **Hands-On Learning**

Power Query in Excel (Beginner) - 2 hr AM training plus break

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Monday, May 5, 2025 (Cont.)

2:00 PM - 4:00 PM	Discovery Station Open - Seattle Room
2:15 PM - 2:45 PM	Sponsored Break
2:45 PM - 3:45 PM	Breakout Sessions
	ERP Upgrades & Tax: Getting the most out of enterprise investments and practical strategies to meet tax needs
	Leveraging APIs to Manage your Tax Data
3:45 PM - 4:00 PM	Break
4:00 PM - 5:15 PM	Emerging Technology Panel - Perspectives from Incubation Leaders
5:15 PM - 6:30 PM	Networking Reception

Tuesday, May 6, 2025

7:15 AM - 6:30 PM	TEI Registration Desk Open
7:15 AM - 8:15 AM	Continental Breakfast
8:15 AM - 9:15 AM	Breakout Sessions
	Accelerating Digital: Tech and Data to ride out Global Indirect Tax Digital Disruption and Evolving Regulations
	Current Federal and State AI Regulation/Ethics in the U.S
8:15 AM - 10:30 AM	Hands-On Learning
	Automation Challengers! Unlock the Power of Connected Apps in Power Platform: Hands-On automation case competition - Part 2 (Tuesday AM)
	Unlocking ETR Insights with Power BI: A Hands-On Workshop - 2 hr AM training plus break
9:15 AM - 9:30 AM	Sponsored Break
9:30 AM - 10:30 AM	Breakout Sessions
	Aligning Tax and Enterprise Data for Success
	Automation Sustainment: Ensuring deployed automation continues to deliver; best practices, tips and frameworks
10:30 AM - 11:00 AM	Break
11:00 AM - 12:00 PM	Prompts & Personas: Overview, Tips and Best Practices in GenAI prompt engineering
12:00 PM - 1:00 PM	Networking Lunch
1:00 PM - 2:00 PM	Breakout Sessions
	Can Tax "pro-code" in no-code: Python integration into Excel
	Exemption Certificate Management: Future-Proof Strategies and Technologies
1:00 PM - 3:30 PM	Hands-On Learning
	Unlocking ETR Insights with Power BI: A Hands-On Workshop - 2 hr PM training plus break

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Tuesday, May 6, 2025 (Cont.)

2:00 PM - 4:00 PM	Discovery Station Open - Seattle Room
2:00 PM - 2:30 PM	Sponsored Break
2:30 PM - 3:30 PM	Breakout Sessions
	ADVANCED Power Platform
	Transformation of Tax Data Review: Reporting visualization and analytics storytelling
3:30 PM - 3:45 PM	Break
3:45 PM - 5:00 PM	AI in Tax Panel
5:00 PM - 5:15 PM	Break
5:15 PM - 6:30 PM	Attendees Meetup

Wednesday, May 7, 2025

8:15 AM - 5:00 PM	TEI Registration Desk Open
8:15 AM - 9:00 AM	Continental Breakfast
9:00 AM - 10:00 AM	Breakout Sessions
	Addressing ASU 2023-09 ETR Reporting Requirements Through Technology
	The Evolution of Modernized Tax Authorities - OECD Digital Tax Administration - Updates, Outlook, Impact to Your Own Strategy
9:00 AM - 11:30 AM	Hands-On Learning
	Empowering Tax Teams with Power Apps (Beginner): A Hands-On Workshop - 2hr AM training plus break
10:00 AM - 10:30 AM	Break
10:30 AM - 11:30 AM	Breakout Sessions
	AI Agents in the Tax Function: Implications for Tax Executives
	Harnessing Generative AI and Alteryx for Unstructured Tax Data Management
11:30 AM - 12:30 PM	Networking Lunch
12:30 PM - 1:00 PM	Automation Case Competition Showcase
1:00 PM - 2:00 PM	Cultivating a Culture of Innovation
2:00 PM - 2:30 PM	Sponsored Break
2:30 PM - 3:30 PM	Breakout Sessions
	Optimizing Operational Transfer Pricing Through Tax Technology
	Using Microsoft Fabric for ETL Data Transformation
2:30 PM - 4:45 PM	Hands-On Learning
	Empowering Tax Teams with Power Apps (Beginner): A Hands-On Workshop - 2hr PM training plus break

Wednesday, May 7, 2025 (Cont.)

3:30 PM - 3:45 PM	Break
3:45 PM - 4:45 PM	Breakout Sessions
	Building Tax Agents with Microsoft Copilot Studio
	Advancing Tax Data Strategies and Leveraging Your Tech Stack
4:45 PM - 5:00 PM	Break
5:00 PM - 6:00 PM	Attendees Meetup
