



Connect. Engage. Impact.

# 2026 Midyear Conference Grand Hyatt Washington, DC March 15-18

## Program At A Glance

Topics and Times are Subject to Change

### Sunday, March 15, 2026

9:00 AM - 11:30 AM	Executive Committee Meeting
11:30 AM - 1:00 PM	Executive Committee and Past International Presidents Luncheon
1:00 PM - 4:00 PM	Board of Directors Meeting
4:00 PM - 5:00 PM	Roundtable Meetings (TLD, FED, IRSAA/CAP, SALT, INTL, TECH)
5:30 PM - 6:30 PM	First Time Registrant / New Member / Non-Member Meet & Greet
6:30 PM - 7:30 PM	Welcome Reception
7:30 PM - 9:30 PM	Past International Presidents Dinner

### Monday, March 16, 2026

7:00 AM - 8:00 AM	Registration and Continental Breakfast
8:00 AM - 8:10 AM	Welcome/Opening Remarks
FED 8:10 AM - 8:50 AM	A Conversation on Tax Policy with Kenneth Kies, Assistant Secretary for Tax Policy, Moderated by Former Assistant Secretary Pam Olson
FED/INTL 8:55 AM - 9:45 AM	Plenary Session - Tax Policy & Midterm Election Preview
9:45 AM - 10:00 AM	<b>BREAK</b>
10:00 AM - 11:00 AM	<b>BREAKOUT SESSIONS</b>
INTL	Pillar Two and the "Side-by-Side" Agreement
SALT	Mapping the Landscape: Emerging Trends in State Tax Policy
CTO/TLD	Solving the Tax Capacity Crisis: A Blueprint for Managed Services and Staffing
TECH	TEI Tax Lab: Latest Tools and Trends in Income Tax Compliance
11:00 AM - 11:15 AM	<b>BREAK</b>

#### TRACK DESIGNATIONS: Educational tracks are identified throughout the program as follows:

TLD - Tax Leadership & Development  
CTO - Chief Tax Officer  
ETHICS - Ethics

FED - Federal Tax  
FIN - Financial Reporting

IRSAA - IRS Administrative Affairs  
INTL - International Tax

TECH - Tax Technology  
SALT - State & Local Tax  
CAN - Canada

KEY: ○ ROUNDTABLE  
● A Accounting Credit

# TEI's 2026 Midyear Conference | Preliminary Program

Monday, March 16, 2026 (Cont.)

	11:15 AM - 12:15 PM	<b>BREAKOUT SESSIONS</b>
INTL		US Tariff Update: Can I Get a Refund and How?
TLD		Executive Presence vs. Shadow Presence: Leading Beyond Fear
FED		Hot Topics in Accounting Methods
TECH		TEI Tax Lab: AI and Tax Research with Thomson Reuters and Co-Counsel
	12:15 PM - 1:40 PM	<b>LUNCHEON</b>
	12:15 PM - 1:40 PM	<b>CHAPTER LEADERS LUNCH</b>
	1:45 PM - 2:45 PM	<b>BREAKOUT SESSIONS</b>
SALT		Beyond Income Tax: The Latest in Gross Receipts Trends
FED		Navigating Today's Debt Questions
IRSAA		Strategic Engagement Opportunities: Digging Deeper into the Toolbox of IRS Resolution Strategies
TECH		TEI Tax Lab: AI and Tax Research with Accordance
	2:45 PM - 3:00 PM	<b>BREAK</b>
	3:00 PM - 4:00 PM	<b>BREAKOUT SESSIONS</b>
SALT		SALT Audit Proofing: Essential Strategies for the In-House Team
FED		Corporate Tax Updates
IRSAA		Penalty Approvals: Section 6751(b) and the New Regulations
		TEI Tax Lab: Excel Power Query a Hands-On Exercise
	4:00 PM - 4:30 PM	<b>NETWORKING BREAK, SPONSORED BY CRUX</b>
	4:30 PM - 5:30 PM	<b>BREAKOUT SESSIONS</b>
SALT		U.S. Indirect Tax Update: Critical SALT Developments for 2026
FED		Executive Compensation in M&A
FED		Energy Credit Q&A
TECH		TEI Tax Lab: Excel Power Query a Hands-On Exercise
	6:30 PM - 11:00 PM	<b>SPONSOR PARTIES/EVENTS</b>

Tuesday, March 17, 2026

	7:00 AM - 8:00 AM	<b>CONTINENTAL BREAKFAST</b>
	8:00 AM - 8:15 AM	<b>WELCOME BACK</b>
IRSAA	8:15 AM - 9:30 AM	Plenary Session The Evolving IRS Landscape: Challenges and Opportunities
	9:30 AM - 9:45 AM	<b>BREAK</b>
	9:45 AM - 10:45 AM	<b>BREAKOUT SESSIONS</b>
INTL		3M and the Future of Transfer Pricing Controversy: Bellwether or Outlier?
FED/IRSAA		R&D Tax Credit Update
FIN		FASB Activities and Priorities
TECH		TEI Tax Lab: AI and Tax Technology Tools with Wolters Kluwer

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Tuesday, March 17, 2026 (Cont.)

	10:45 AM - 11:00 AM	<b>BREAK</b>
	11:00 AM - 12:00 PM	<b>BREAKOUT SESSIONS</b>
INTL		Public Country-by-Country Reporting in Australia and the EU: Best Practices
SALT		SALT in the Deal Room: Structuring, Diligence, and Integration
IRSAA		The Latest at IRS Appeals: Expanded Use of Fast Track and ADR to Close Cases
TECH		TEI Tax Lab: Research Credit Automation
	12:00 PM - 1:30 PM	<b>LUNCHEON</b>
		<b>CTO Luncheon   Erin Collins - National Taxpayer Advocate</b>
		<b>Small, Medium, and Large Tax Department Networking Session</b>
	1:30 PM - 2:30 PM	<b>BREAKOUT SESSIONS</b>
SALT		Everything Everywhere All at Once: State Taxation of Ads, Data, and Information Services
FED		Current Issues in M&A
IRSAA		Economic Substance and Beyond: Federal Tax Controversy and Litigation Update
TECH		TEI Tax Lab: Managing Tax Notices with AI
	2:30 PM - 2:45 PM	<b>BREAK</b>
	2:45 PM - 3:45 PM	<b>BREAKOUT SESSIONS</b>
INTL		Inbounding Assets
FED		IRA Credits: New Audit Frontier
SALT		SALT Controversy Report: Essential SALT Cases Reshaping the Rules
TECH		TEI Tax Lab: Tools and Trends in Indirect Tax Compliance
	3:45 PM - 4:15 PM	<b>SPONSOR NETWORKING BREAK - TAFT STETTINIUS &amp; HOLLISTER</b>
	4:15 PM - 5:15 PM	<b>BREAKOUT SESSIONS</b>
FIN		Dissecting the Details: Lessons Learned from Company Disclosures under ASU 2023-09
FED		OBBBA and Real Estate Transactions, Investments, and After-Tax Cash Flow
TECH		The Borderless Tax Function: Managing Global Complexity with Digital Tools
TECH		TEI Tax Lab: Escaping Excel: Using AI to Analyze Excel Files for Accountants
	6:30 PM - 9:30 PM	<b>TEI GRAND RECEPTION</b>

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## Wednesday, March 18, 2026

	7:30 AM - 8:30 AM	Thomson Reuters Advisory Board Corporate Tax and Generative AI: Current and Future Use Cases for the Tax Professional
	8:30 AM - 9:30 AM	<b>BREAKOUT SESSIONS</b>
INTL		OBBBA: International Tax Guidance Update
FED		Beyond M&A: Using Tax Insurance as a Strategic Tool in the Ordinary Course of Business
SALT		The Invisible Customer: Navigating State Look-Through Sourcing
TECH		TEI Tax Lab: Pillar Two and Technology
	9:30 AM - 9:45 AM	<b>BREAK</b>
	9:45 AM - 10:45 AM	<b>BREAKOUT SESSIONS</b>
TLD/ETHICS		The Soul of a New Machine: Ethical Considerations in the Use of AI in Tax Practice
FED		Complex Issues in Partnership Allocations
SALT		Trendlines & Territories: Mapping the Future of State Credits
	10:45 AM - 11:00 AM	<b>BREAK</b>
TECH	11:00 AM - 12:15 PM	Closing Plenary Session Tax GPT: Friend, Foe, Failure or Future?