



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.



Connect. Engage. Impact.

2022 Tax Technology Seminar

Time (PT)

MONDAY, MAY 2

DAY 1

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?

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
Automating Tax Credits and Incentives for Improved Compliance and Accuracy

10:30 - 11:00 AM

Sponsored Break

11:00 AM - 12:00 PM

BREAKOUT SESSIONS

Tax Function Automation – Citizen Developers and Beyond Including Use of Tools such as PowerAutomate, PowerQuery and Alteryx
Artificial Intelligence & the Partnership Schedule K-1

12:00 - 1:00 PM

[Networking Lunch](#)

1:00 - 2:00 PM

BREAKOUT SESSIONS

Automating on a Budget: Building the Business Case for a Phased Approach
Using Data and Tech to Further U.S. International Tax Modeling

2:00 - 2:15 PM

Break

2:15 - 3:15 PM

BREAKOUT SESSIONS

Powering Tax Transformation with Technology
State Apportionment – Common Data Challenges and Workarounds

3:15 - 3:45 PM

Sponsored Break

3:45 - 4:45 PM

BREAKOUT SESSIONS

Predictive Analytics for Tax
What to Know After Implementing a Sales Tax Technology Solution

4:45 - 5:00 PM

Break

5:00 - 6:00 PM

PLENARY: Emerging Technology Panel – Perspectives from Incubation Leaders

6:00 - 7:00 PM

[Networking Reception](#)



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2022 Tax Technology Seminar

Time (PT)

TUESDAY, MAY 3

DAY 2

8:15 - 9:15 AM

BREAKOUT SESSIONS

AI – Beyond the Hype

Managing Your Global Tax Footprint Using Data Exchange and Analytics Tools

9:15 - 9:30 AM

Break

9:30 - 10:30 AM

BREAKOUT SESSIONS

Tax Automation Jump Start

Automating the Use Tax Function

10:30 - 11:00 AM

Sponsored Break

11:00 AM - 12:00 PM

BREAKOUT SESSIONS

Real World Applications of Microsoft Power Apps and Power Automate to Enhance Tax Operations

Role of Technology in Adopting BEPS 2.0

12:00 - 1:00 PM

[Networking Lunch](#)

1:00 - 2:00 PM

BREAKOUT SESSIONS

The New Tax Data Hub: How Data Lakes Are Changing the Data Experience for Tax

TBD

2:00 - 2:15 PM

Break

2:15 - 3:15 PM

BREAKOUT SESSIONS

Executive Reporting & Analytics – Unleash the Power of Your Data

TBD

3:15 - 3:45 PM

Sponsored Break

3:45 - 4:45 PM

PLENARY: *Rethinking Your Tax Department with a Hybrid Inclusive Tech Strategy*

4:45 - 5:00 PM

Break

5:00 - 6:00 PM

[Members Only Forum](#)



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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.

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|----------------------|---|
| 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



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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.

San Francisco requires all persons to show proof of vaccination or a negative COVID-19 test to attend indoor meetings and events. The vaccination mandate requires proof of at least two doses of the Pfizer or Moderna vaccine or one dose of the Johnson & Johnson vaccine. TEI will use a vaccination app to collect information regarding attendees' vaccination status before the event. Those who are not vaccinated must wear a mask and show proof from a lab or outside source of a negative PCR test within two days of entry or a rapid antigen test within one day of entry. Attendees who do not provide a proper form of vaccination verification or proof of a negative test cannot participate in the Tax Technology Seminar. For more information regarding San Francisco's vaccination mandate, visit <https://sf.gov/information/vaccine-required>.

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.



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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

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.).