

# SUNDAY, MARCH 19

(NOTE: all sessions before 4pm are by invitation only)

SUNDAY

9:00 am – 11:30 am **Executive Committee Meeting**

11:30 am – 1:00 pm **Executive Committee, Committee Chairs & Past Presidents Luncheon**

Noon – 7:30 pm **Registration Open**

1:00 pm – 4:00 pm **Board of Directors Meeting**

4:00 pm – 6:00 pm **Committee Meetings**

Corporate Tax Management

Federal Tax Committee

Financial Reporting Committee

IRS Administrative Affairs Committee

State & Local Tax Committee

U.S. International Tax Committee



6:30 pm – 7:30 pm **Welcome Reception** ..... Exhibit Hall

# MONDAY, MARCH 20

7:00 AM - 5:15 PM **Registration Open**

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

7:00 - 8:00 AM **Chapter Leaders' Roundtable**

8:00 - 8:15 AM **Welcome & President's Address**

Janice Lucchesi

*TEI's International President*

8:15 - 8:45 AM **Keynote**

Hon. Paul Ryan, Speaker (invited)

*U.S. House of Representatives*

8:50- 9:50 AM **Looking Back, Looking Forward:  
A Conversation with Robert Stack**

(former Deputy Assistant Secretary (International Tax Affairs), U.S. Department of the Treasury)

Mark Pollard, Moderator

*Kimberly-Clark Corporation*

*Chair, TEI's U.S. International Tax Committee*

9:50 - 10:00 AM **Break**

10:00 - 11:00 AM **Demystifying the Tax Legislative Process**

F

David A. Heywood, Moderator  
*Lockheed Martin Corporation*

E. Ray Beeman  
*Washington Council Ernst & Young*

Robert Carroll  
*Ernst & Young LLP*

Janice A. Mays  
*PricewaterhouseCoopers LLP*

10:00 - 11:00 AM **Restructuring in Response to BEPS –  
Country Activity and Company Response**

INTL

Tasheaya Ellison, Moderator  
*Shell Oil Company*  
*Vice Chair, TEI's U.S. International Tax  
Committee*

Calum M. Dewar  
Sherry Grabow  
*PricewaterhouseCoopers LLP*

10:00 - 11:00 AM **When Do You Elevate?**

F

Kelly Nall, Moderator  
*Hewlett Packard Enterprise Company*

Paul D. DeNard  
*PricewaterhouseCoopers LLP*

Sheri A. Dillon  
*Morgan, Lewis & Bockius LLP*

Paul DiSangro  
*Mayer Brown LLP*

11:00 - 11:15 AM **Break**

11:15 AM - 12:15 PM **Economic Nexus - The Assault on Quill and  
Other Developments**

SALT

Howard E. Grindle, Moderator  
*Gate Gourmet, Inc.*  
*Vice Chair, TEI's State & Local Tax Committee*

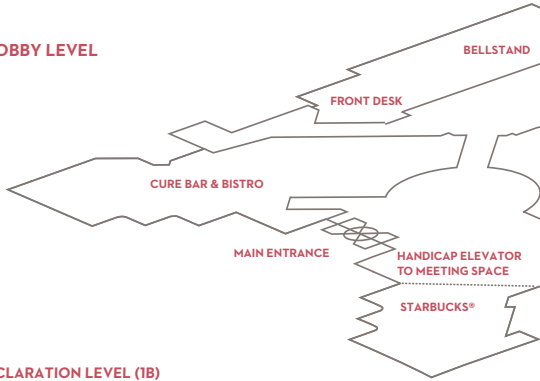
Michele Borens  
*Eversheds Sutherland (US) LLP*

Brian J. Kirkell  
*RSM US LLP*

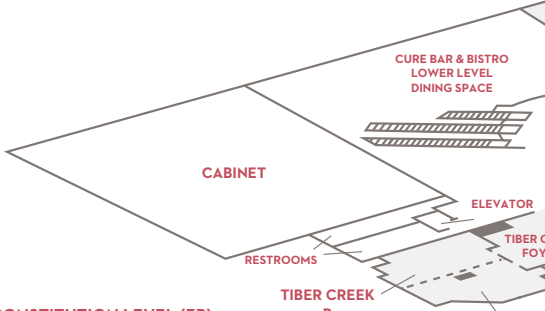
# FLOOR PLAN

All Floors

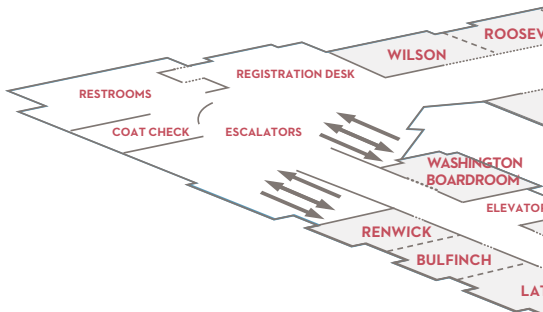
## LOBBY LEVEL



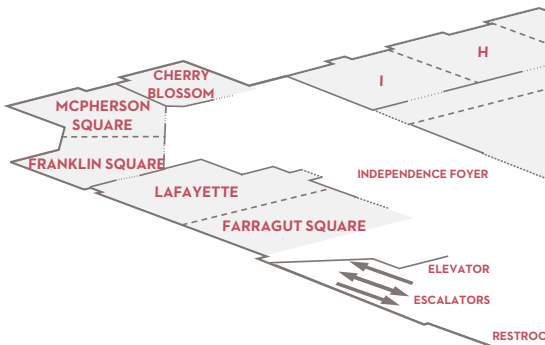
## DECLARATION LEVEL (1B)

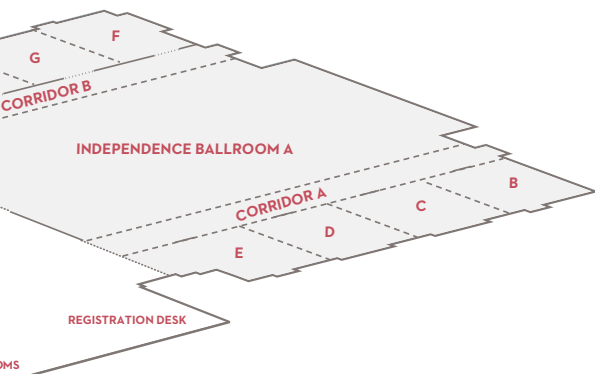
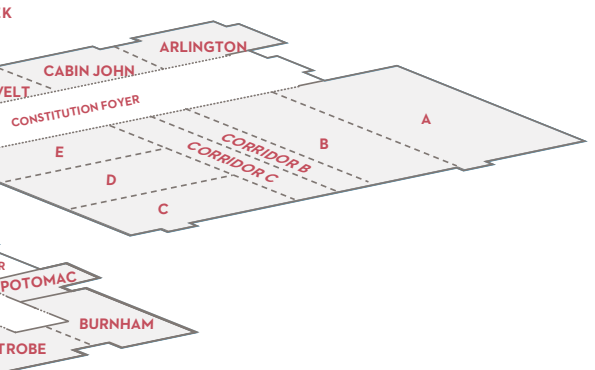
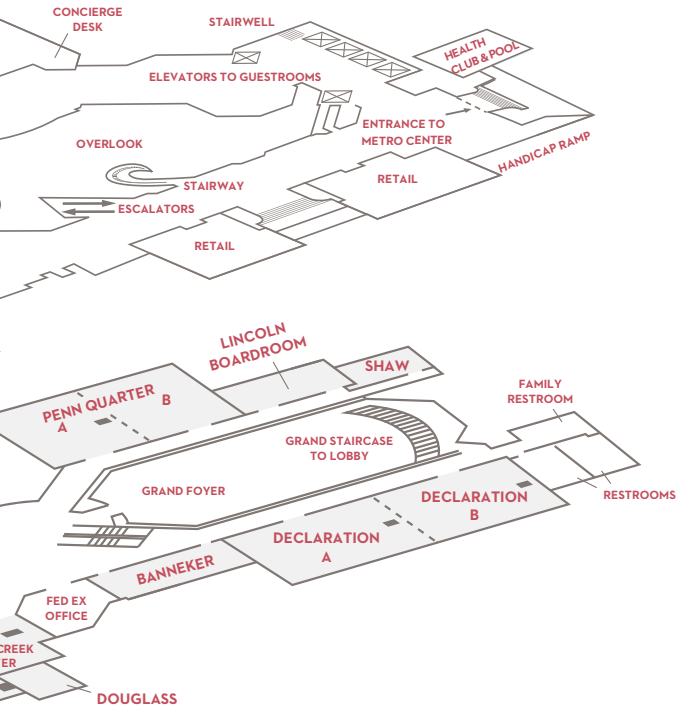


## CONSTITUTION LEVEL (3B)



## INDEPENDENCE LEVEL (5B)





11:15 AM - 12:15 PM

**A Conversation with Donna Hansberry,  
IRS Chief of Appeals**

F

Wayne A. Hamilton, Moderator  
*Wal-Mart Stores, Inc.*  
*Vice Chair, TEI's Federal Tax Committee*Donna C. Hansberry  
*Chief of Appeals*  
*Internal Revenue Service*Diane S. Ryan  
*Skadden, Arps, Slate, Meagher & Flom LLP*

11:15 AM - 12:15 PM

**Best Practices: CbyC Reporting Issues &  
Challenges**

INTL

Gary T. Weaver, Moderator  
*Hormel Foods Corp.*  
*Vice Chair, TEI's U.S. International Tax  
Committee*Todd Izzo  
Joseph Tobin  
*Deloitte Tax LLP*

12:25 - 2:10 PM

**LUNCH & ROUNDTABLE –  
What Tax Reform Might Look Like**Janice Lucchesi, Moderator  
*TEI's International President*John Gimigliano  
*KPMG LLP*Nicholas Giordano  
*Washington Council Ernst & Young LLP*Rohit Kumar  
*PricewaterhouseCoopers LLC*Jonathan Traub  
*Deloitte Tax LLP*

2:15 - 3:30 PM

**Effective Management of IRS Transfer  
Pricing Disputes**

F

INTL

Michael J. Bernard, Moderator  
*Microsoft Corporation*David B. Blair  
*Crowell & Moring LLP*Nancy W. Chassman  
*Roberts & Holland LLP*Brian W. Kittle  
*Mayer Brown LLP*

2:15 - 3:30 PM

**Toward a Best in Class Tax Department –  
Flexible Work Schedules and Other Concepts**

GEN

CTO

2:15 - 3:30 PM **FIN48: A Critical Look at the First Decade**

**SALT** **GEN**

Albert A. Pisanelli, Moderator  
*The Vanguard Group, Inc.*

Eric L. Johnson  
*Ross Stores, Inc.*

~~Chair, TEI's Financial Reporting Committee~~

Kyle O. Sollie  
*Reed Smith LLP*

3:30 - 4:00 PM **Break**

4:00 - 5:15 PM **Managing the Income Tax Accounting Function**

**CTO**

Don J. Rath, Moderator  
*Synopsys, Inc.*

Charles M. Chubb  
*Andersen Tax*

April D. Little  
*Grant Thornton LLP*

4:00 - 5:15 PM **State Implications of U.S. Tax Reform**

**SALT**

Richard O'Connor, Moderator  
*Maxim Healthcare Services, Inc.*

Harley T. Duncan  
Shirley K. Sicilian  
*KPMG LLP*

Steven N. Wlodychak  
*Ernst & Young LLP*

4:00 - 5:15 PM **Section 987 Foreign Currency Regulations – An Analysis**

**INTL**

Sarah Winters, Moderator  
*Cushman & Wakefield, Inc.*  
*Vice Chair, TEI's U.S. International Tax Committee*

John D. McDonald  
Joshua S. Richardson  
*Baker & McKenzie LLP*

5:30 - 6:30 PM **CAP Subcommittee**

5:30 - 6:30 PM **International Tax Issue Forum**

5:30 - 6:30 PM **SALT Issue Forum**

5:30 - 6:30 PM **Closely Held Companies Issue Forum**

5:30 - 6:30 PM **First-Timer and New Member Reception**

# TUESDAY, MARCH 21

TUESDAY

7:00 AM - 5:00 PM **Registration Open**

7:00 - 8:00 AM **CTO Breakfast**

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

8:00 - 9:00 AM **ROUNDTABLE – State of the States:  
Tax Policy in a New Era**

Jamie Fenwick, Moderator

*Charter Communications, Inc.*

*Chair, TEI's State and Local Tax Committee*

Michael Fatale

*Deputy General Counsel*

*Massachusetts Department of Revenue*

Brian Fliflet

*Deputy General Counsel (Income Tax Policy)*

*Illinois Department of Revenue*

Nancy Prosser

*Special Counsel to the Deputy Comptroller*

*Texas Comptroller of Public Accounts*

9:00 - 9:50 AM **Transparency, Tax Reform and the Road Ahead**

Mary C. Bennett, Moderator

*Baker & McKenzie LLP*

Michael Mundaca

*Ernst & Young LLP*

Anna Theeuwes

*Shell International B.V.*

9:50 - 10:00 AM **Break**

10:00 - 11:00 AM **Research and Experimentation Credit  
Guidance – Internal Use Software**

F

Sandhya K. Edupuganty, Moderator

*Texas Instruments Incorporated*

*Vice Chair, TEI's Federal Tax Committee*

Kathleen King

*Alvarez & Marsal Taxand, LLC*

Jeffrey Malo

*Andersen Tax*

10:00 - 11:00 AM **EU State Aid and The Foreign Tax Credit**

INTL

Brian D. Snay, Moderator

*EMD Millipore Corporation*

*Vice Chair, TEI's U.S. International Tax Committee*

Larry R. Pounders

*Office of Chief Counsel (International)*

*Internal Revenue Service*

Brett A. Weaver

*KPMG LLP*

10:00 - 11:00 AM **U.S. Supreme Court State Tax Cases  
Everyone Should Know**

SALT

Marji L. Gordon-Brown, Moderator  
*MacAndrews & Forbes, Inc.*  
*Chair, TEI's State & Local Tax Committee*

Jeffrey A. Friedman  
*Eversheds Sutherland (US) LLP*  
Walter Hellerstein  
*University of Georgia School of Law*

11:00 - 11:15 AM **Break**

11:15 AM - 12:15 PM **Prove It: Market-Based Sourcing Methodologies**

SALT

Korwin Roskos, Moderator  
*Amazon.com, Inc.*

Todd A. Lard  
*Eversheds Sutherland (US) LLP*

Sarah McGahan  
*KPMG LLP*

11:15 AM - 12:15 PM **Data Analytics – Tools For Every Tax  
Department**

CTO

Janet M. Rudnicki, Moderator  
*Service Corporation International*

Kimberly S. Deeb  
*Ernst & Young LLP*

Jen Deutsch  
*Deloitte Tax LLP*

Steven Hinckley  
*Vertex, Inc.*

Peter Marzullo  
*Thomson Reuters*

11:15 AM - 12:15 PM **Ethics & the In-House Tax Professional –  
Up Close and Personal** E

GEN

Brian P. Kaufman, Moderator  
*Capital One Financial Services, Inc.*  
*Vice Chair, TEI's IRS Administrative Affairs  
Committee*

Kathryn Keneally  
*DLA Piper LLP (US)*

Scott Michel  
*Caplin & Drysdale*

12:25 - 1:50 PM **Lunch**

John A. Koskinen  
*Commissioner*  
*Internal Revenue Service*



2:00 - 3:15 PM **What's Happening With Fringe Benefit Audits?**

F

Marcus S. Shore, Moderator

*Duke Energy Corporation*

Marianna G. Dyson

*Miller & Chevalier Chartered*

Jonathan Zimmerman

*Morgan, Lewis & Bockius LLP*

2:00 - 3:15 PM **Around the Horn At the FASB;  
Leasing, Disclosures, etc.**

GEN

Eric L. Johnson, Moderator

*Ross Stores, Inc.*

*Chair, TEI's Financial Reporting Committee*

Chris Chiriatti

Patrice M. Mano

*Deloitte Tax LLP*

William Marx, Jr.

*Grant Thornton LLP*

2:00 - 3:15 PM **International Tax Reform – A Deeper Dive**

CTO

INTL

Mark Pollard, Moderator

*Kimberly-Clark Corporation*

*Chair, TEI's U.S. International Tax Committee*

Mark J. Mazur

*Urban-Brookings Tax Policy Center*

Danielle Rolfes

*Washington, DC*

3:15 - 3:45 PM **Break**

3:45 - 5:00 PM **The New Partnership Rules –  
A Preliminary Assessment**

F

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Rita M. Makaris, Moderator

*Skidmore, Owings & Merrill LLP*

Jon G. Finkelstein

*KPMG LLP*

Matthew D. Lerner

*Sidley & Austin LLP*

Mary McNulty

*Thompson & Knight LLP*

3:45 - 5:00 PM **Section 385 Roundup**

GEN

SALT

F

INTL

Anthony O'Donnell, Moderator  
*EMD Serono, Inc.*

Valerie Dickerson  
*Deloitte Tax LLP*

Aaron P. Nocjar  
*Steptoe & Johnson LLP*

Raymond J. Stahl  
*Special Counsel (ACCI)*  
*Internal Revenue Service*

Sally A. Thurston  
*Skadden, Arps, Slate, Meagher & Flom LLP*

3:45 - 5:00 PM **Acquisition and Structuring  
Opportunities With Partnerships**

F

Katherine C. Castillo, Moderator  
*Guardian Industries*  
*Chair, TEI's Federal Tax Committee*

Andy Immerman  
*Alston & Bird LLP*

Lee Morlock  
*Mayer Brown LLP*

Jonathan Talansky  
*King & Spalding LLP*

5:15 - 6:15 PM **Emerging Tax Professionals Session**

5:15 - 6:15 PM **Tax Reform Tax Force Meeting**

6:30 - 9:00 PM **Reception**

# WEDNESDAY, MARCH 22

7:00 - 8:30 AM **Thomson Reuters ONESOURCE Advisory Board**

7:00 - 8:30 AM **Thomson Reuters Checkpoint Advisory Board**

7:30 AM - 12:15 PM **Registration Open**

7:30 - 8:30 AM **Continental Breakfast**

8:30 - 9:45 AM **VAT Developments Around the World**

David Card, Moderator  
*Spectra Energy Corporation*  
Chair, TEI's Canadian Commodity Tax Committee

Sandy Bhogal  
*Mayer Brown LLP*

Alan Kenigsberg  
*Osler, Hoskin & Harcourt LLP*

Francesco Marconi  
*Andersen Tax*

Mairead Warren de Burca  
*Alvarez & Marsal Taxand LLC*

8:30 - 9:45 AM **The Millennial Mindset – What Matters Most to Them? Let's Have a Look**

CTO

8:30 - 9:45 AM **IRS Update**

GEN F

9:45 - 10:00 AM **Break**

10:00 - 11:00 AM **M&A Tax Accounting "Refresher"**

CTO F

Stephen Dunphy, Moderator  
*Ross Stores, Inc.*  
Vice Chair, TEI's Financial Reporting Committee  
Angela L. Evans  
Todd A. Miller  
*Ernst & Young LLP*

10:00 - 11:00 AM **Federal Excise Taxes – Navigating the Complexities**

F

David Gillman, Moderator  
*Telephone & Data Systems, Inc.*  
David Fonda  
Thomas A. Windram  
*RSM US LLP*

WEDNESDAY

10:00 - 11:00 AM **Unclaimed Property**

SALT

Robert M. Ahonen, Moderator  
*The Babcock & Wilcox Company*

Gwen Lawhorn

*DuCharme, McMillan & Associates, Inc.*

Amy Nogid

*Eversheds Sutherland (US) LLP*

11:00 - 11:15 AM **Break**

11:15 AM - 12:15 PM **Tax Technology Roundtable**

CTO

Nathan R. Andrews, Moderator  
*Deloitte Tax LLP*

11:15 AM - 12:15 PM **IP Transfers: Update and Financial Accounting Issues**

INTL

Kent Cain, Moderator  
*Michaels Stores, Inc.*

Alice Loo

*Deloitte Tax LLP*

David A. Northcut

*Ernst & Young LLP*

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

12:30 - 1:30 PM **CE Committee Meeting**