



# TAX EXECUTIVES INSTITUTE, INC.

## Twelfth Annual Region II Tax Forum

June 5-6, 2017  
Borgata Hotel  
Atlantic City, NJ

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# TAX EXECUTIVES INSTITUTE, INC.

## Dear Members and Friends of Tax Executives Institute Region II:

Region II is returning to the Borgata Hotel in Atlantic City, New Jersey, for the 2017 Region II Tax Forum. Our 12th Annual Tax Forum will be held on Monday and Tuesday, June 5-6, at this exquisite location. We are honored to have Eversheds Sutherland and PricewaterhouseCoopers LLP partnering with us as co-sponsors of the 2017 Tax Forum.

As you can see from this brochure, the Tax Forum will include 5 plenary and 8 breakout sessions offering a wide selection of Federal, International, and State & Local topics. Presenters will be the top-level speakers from our sponsoring firms. From Tax Reform, OECD Developments, IRS Audit Update, SALT Controversy and Regional Update, M&A, Transfer Pricing, to Accounting Periods and Methods, Ethics, Tax Department Evolution, and Partnerships, the Tax Forum has something for every corporate tax professional concerned with the key issues of the day.

The \$225 registration fee covers all of the technical sessions, breakfast, lunch and refreshments on both days, as well as our Monday evening reception. An estimated 11.5 CPE or 11.5 CLE credits will be available.

As in the past, this will be a "green" meeting. Handout materials will be available online only. You will have the option of either printing the materials in advance or bringing a mobile device. Although Wi-Fi will be available in all meeting rooms, you may want to download the materials in advance of the conference.

This will truly be an event not to be missed and I look forward to seeing you in Atlantic City!

Sincerely,

Glen R Strobel  
Vice President, Region II  
Tax Executives Institute

# Agenda

**MONDAY, JUNE 5, 2017**

**Registration/Breakfast**  
7:30 AM to 8:30 AM

Registration

**Welcome**

8:30 AM to 8:40 AM

Opening Remarks

Glen Strobel, TEI Region II Vice-President

**Plenary Session 1**

8:40 AM to 9:30 AM

Federal Tax Reform

(ES) Taylor M. Kiessig  
(PwC) Todd Metcalf  
(TEI) Tom Fezza, Moderator

**Plenary Session 2**

9:30 AM to 10:45 AM

OECD Developments - BEPS, State Aid

(ES) Ben Jones  
(PwC) Frances Horner  
(TEI) Harold Spitzfaden, Moderator

**Break**

10:45 AM to 11:00 AM

**Concurrent Session 3A**

11:00 AM to 12:15 PM

IRS Audit Update

(ES) Amish M. Shah  
(PwC) Paul DeNard  
(TEI) Austin Murphy, Moderator

**Concurrent Session 3B**

11:00 AM to 12:15 PM

State and Local Income Tax Controversies

(ES) Marc A. Simonetti  
(ES) Todd A. Lard  
(PwC) Scott L. Austin  
(PwC) Michael Zargari  
(TEI) Lori Matulewicz, Moderator

**Luncheon and Keynote Address - Session 4**

12:15 PM to 2:00 PM

TEI Regional Vice-President - Glen Strobel  
Keynote Speaker: TBD  
Eli Dicker, TEI Executive Director

Sponsored by PwC

**Plenary Session 5**

2:15 PM to 3:30 PM

Mergers and Acquisitions: Federal and State Tax Implications

(ES) Robert S. Chase II  
(ES) Maria M. Todorova  
(PwC) Scott A. Rock  
(PwC) Vitaliy Los  
(TEI) Bruce Maggin, Moderator

**Break**

3:30 PM to 3:45 PM

**Concurrent Session 6A**

3:45 PM to 5:00 PM

Federal and International Partnership and Joint Venture Developments

(ES) H. Karl Zeswitz  
(ES) Alan Connell  
(PwC) Daniel F. Carmody  
(TEI) Paul Cevoli, Moderator

**Concurrent Session 6B**

3:45 PM to 5:00 PM

Regional State and Local Tax Update

(ES) Open Weaver Banks  
(ES) Nicole Boutros  
(PwC) Hardeo Bissoondial  
(TEI) Linda A. Klang, Moderator

**Hospitality Reception**

5:00 PM to 6:30 PM

Networking

Sponsored by Eversheds Sutherland

**Dinner - on your own**

## TUESDAY, JUNE 6, 2017

### **Breakfast**

7:30 AM to 8:00 AM

### **Plenary Session 7**

8:00 AM to 9:00 AM

Ethics: Diverse Workforce

(ES) Vanessa A. Scott  
(PwC) Marvin Mendoza  
(TEI) Barbara Buklad, Moderator

### **Plenary Session 8**

9:00 AM to 10:00 AM

Managing Tax Controversies - A Global Perspective

(ES) Thomas A. Cullinan  
(ES) Giles Salmond  
(PwC) Kevin Brown  
(TEI) Barry Agranoff, Moderator

### **Break**

10:00 AM to 10:15 AM

### **Concurrent Session 9A**

10:15 AM to 11:15 AM

State and Local: Alternative Tax Litigation

(ES) Carley A. Roberts  
(ES) Andrew D. Appleby  
(TEI) Joanne Bonfiglio, Moderator

### **Concurrent Session 9B**

10:15 AM to 11:15 AM

The Tax Department of the Future

(PwC) Michelle S. Lee  
(PwC) Jeff Lower  
(TEI) Kelvin Crumby, Moderator

### **Break**

11:15 AM to 11:30 AM

### **Concurrent Session 10A**

11:30 AM to 12:30 PM

Accounting Methods-Significant Issues and Tax Planning Opportunities

(ES) Ellen McElroy  
(PwC) Christine Turgeon  
(TEI) John Orr, Moderator

### **Concurrent Session 10B**

11:30 AM to 12:30 PM

Transfer Pricing Developments: International and State and Local

(ES) Marco Melisse  
(ES) Eric S. Tresh  
(PwC) Anthony Curtis  
(TEI) Andy Landau, Moderator

### **Buffet Lunch**

12:30 PM to 1:30 PM

Closing Remarks

1:30 PM

**Adjourn/Afternoon Activities - On Your Own**

### **Notes:**

- (1) Information on the Borgata Hotel can be obtained at “[www.theborgata.com](http://www.theborgata.com)”.
- (2) Breakfasts, Luncheons and the Reception are open to spouses, guests and vendor-sponsors as well.
- (3) Golf, casinos, transportation to the Boardwalk, spa and other activities are available at all times; arrangements can be made. Attendees will be responsible for fees/costs.
- (4) Speaker Affiliations: (PwC) PricewaterhouseCoopers; (ES) Eversheds Sutherland; (TEI) TEI Moderator.

**Meeting Information:** An estimated 11.5 hours of CPE credits and an estimated 11.5 hours of CLE credits including 1 hour of ethics credit (pending in NY and NJ) will be offered.

**Attire:** Business Casual

**Cancellation Policy:** Refunds will be made for cancellations received in writing on or before May 31, 2017.



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## Tax Executives Institute's Twelfth Annual Region II Tax Forum

June 5-6, 2017

Borgata Hotel, Atlantic City, NJ

### Registration

Please register no later than May 25, 2017 either online by credit card (using Option A) or by check (using Option B) at <http://2017taxforum.eventbrite.com>.

Registrants paying by check should mail the check, made payable to **TEI Region II Tax Forum** in the amount of \$225.00, with a copy of the Eventbrite registration to:

Anthony D. Bernice  
Director of Taxation  
Sharp Electronics Corporation  
100 Paragon Drive  
Montvale, NJ 07645

### Hotel Information

Reservations at the Borgata Hotel can be made by calling 1-866-692-6742 and identifying yourself as a member of the TEI conference (Group Code GBTAX17A).

A limited number of rooms are available at the preferred rate of \$150 per night until May 15, 2017. For directions, log on to: [www.theborgata.com](http://www.theborgata.com)