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TEI's Skills and Leadership Seminar FOR IN-HOUSE TAX PROFESSIONALS

Sharpen your capabilities - become a more effective professional!

It's not just about "case, Code and reg" expertise anymore! To be effective, in-house tax professionals must also develop and maintain proficiency with a broad range of tools, skills, and capabilities to manage and process information efficiently, communicate effectively, and constructively interact with their teams, departments, and companies. TEI's two-day seminar is a "roll-up-your-sleeves," hands-on program to help you build and enhance the personal skills and competencies you need to be a more effective tax professional. Our program is designed around four tracks:

- ▶ **T** Tools
- ▶ **S** Communications Skills
- ▶ **M** Management Capabilities
- ▶ **PD** Professional Development

WEDNESDAY, JUNE 12

5:00 - 7:00 pm Registration Open

THURSDAY, JUNE 13

7:45 - 8:15 am Registration & Continental Breakfast

8:15 - 8:30 am Welcome, Introductions and Objectives — *Taking A Personal Skills Inventory*

8:30 - 9:30 am **Keynote Address/Roundtable:** *What it Takes to Get and Keep Your Seat at the Table*

9:30 - 11:00 am **S** *Essential Communications Skills for Peers, Seniors, Subordinates, Tax & Non-Tax Professionals – A Workshop*

11:00 - 11:15 am **T** *So You Think You Know "Excel?" - Challenge Yourself and Improve! (Beginners/Refreshers)*
Break

11:15 am - 12:15 pm **T** *Microsoft Power Tools – Power Pivot, Power Query & More*

T *Technology Tools for Tax: A Tableaux Workshop*

SCHEDULE CONTINUES...



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THURSDAY, JUNE 13

CONTINUED...

- 12:15 - 1:30 pm **Luncheon & Keynote Speaker/Roundtable**
Effectively Managing Across Generations – X, Y, Millennials, etc.
- 1:45 - 3:00 pm **M** *Remote and Far Flung Tax Departments – Managing, Motivating & Maintaining*
T *Technology Tools for Tax – Alteryx Workshop*
- 3:00 - 5:00 pm **S** *Negotiation Skills Workshop*
S *Writing and Drafting Skills Workshop – It Just Ain’t That Hard, Promise*
- 5:00 - 6:00 pm **T** *Tax Research Tools – Thomson Reuters*
T *Tax Research Tools – Bloomberg Tax*
- 6:00 - 7:00 pm Reception & Networking

FRIDAY, JUNE 14

- 7:30 - 8:00 am Continental Breakfast
- 8:00 - 9:00 am **M** *Managing External Advisors or Herding Cats – Is There a Difference?*
PD *Building My Network, and Developing My Personal Brand*
- 9:00 - 10:30 am **S** *Essential Communications Skills for Peers, Seniors, Subordinates, Tax & Non-Tax Professionals – A Workshop*
T *So You Think You Know “Excel?” – Challenge Yourself and Improve!*
(Intermediate/Power Users)
- 10:30 - 10:45 am Break
- 10:45 am - 12:00 Noon **S** *Time and Project Management*
S *Delegation – Up, Down & Sideways – Paradigms for Success & Failure*
- 12:00 Noon - 1:15 pm Luncheon
- 1:15 am - 3:15 pm **S** *Writing and Drafting Skills Workshop – It Just Ain’t That Hard, Promise*
S *Negotiation Skills Workshop*
- 3:15 - 3:30 pm Networking Break
- 3:30 - 4:45 pm **PD** *Leadership Chemistry, Type & Style – Challenges for the Aspiring Tax Manager*
S *Getting & Giving Feedback*
- 4:45 pm Program Concludes



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Registrations

Registration is limited to members of TEI and other in-house tax professionals. (Individuals engaged in private law, accounting, or other consulting practice are ineligible to attend.) No partial or split registrations are permitted. Registration forms without payment will not be processed by TEI. **Please note:** Membership in Tax Executives Institute is on an individual basis; there are no "company" or "corporate" memberships. Only members of the Institute — or individuals whose membership applications are pending at TEI — are entitled to the member rate. All others are required to pay at the listed nonmember rate. For membership information, visit the "Membership" section of www.tei.org. A registration will not be processed unless it is accompanied by payment, and no registrations will be taken over the telephone.



By web:

www.tei.org. You must login before registering.



By mail:

Tax Executives Institute, Lockbox 9407 PO Box 70280, Philadelphia, PA 19176-0280. Send registration form with check or credit card information.



By fax:

202.638.5607. Credit card registrations only. VISA, MasterCard, American Express, Diners Club, and Discover only. To ensure confidentiality, please fax between 9 a.m. and 4 p.m. ET.



By email:

meetings@tei.org

Enrollment is limited and registrations will be accepted on a first-come, first-served basis. Should maximum enrollment be reached prior to the seminar and TEI cannot accept your registration, you will be notified immediately. You will receive a confirmation by email; no other confirmation will be sent.

Applications should be completed in full. The requested information will be used to comply with continuing education requirements established by state CPA and bar associations as well as federal antidiscrimination rules.

Cancellation and Substitution Policy

All cancellations must be made **in writing** by 4:00 pm ET on May 17, 2019, and will be subject to an administrative service charge of \$75 (U.S.); for cancellations after May 17, 2019 (the date handout materials become available) and before May 24, 2019, the charge will be \$200 (U.S.). No refunds will be made for cancellations received after May 24, and for no-shows. To cancel, please send an email to meetings@tei.org. In the event of cancellation or oversubscription of the conference, TEI's liability is limited to the return of the registration fee. There will be a \$50 substitution fee assessed if you would like to change registrants. Email substitutions to meetings@tei.org.

Handout Materials

Materials will be posted in a searchable format on a secure website. Beginning two weeks before the conference, registrants will be able to access the handouts via a secure link (requiring a password), so they can download or print them out. **No paper copies will be provided in your registration materials, and no onsite printing facilities will be available.** TEI encourages you to download or print documents of interest in advance. (Wi-Fi will be available in the meeting rooms but we strongly suggest downloading the materials in advance.) Materials will remain accessible by registrants for one month after the conference.

Facilities

TEI has secured a discounted block of rooms at the Westin Peachtree Plaza Hotel for seminar registrants at the rate of \$164 + tax per night. To make your reservation, please call 888-627-7087 or 404-659-1000 and say you are with the "TEI Skills Seminar". For online reservations, there is a link on our website and you will receive one in your confirmation email. TEI's discounted room block is limited and will likely sell out prior to our May 29, 2019 cutoff date when remaining rooms will be released back to the hotel for resale and prevailing rates will apply. Make your reservations today.

Westin Peachtree Plaza Hotel, 210 Peachtree Street, NW, Atlanta, GA 30303

Recording Devices

The use of recording devices is prohibited. Please silence all electronic devices upon entering the meeting room.

Financial Aid for Illinois Licensed Attorneys

Scholarships to defray tuition expense for this program are available for in-house tax professionals (both TEI members and nonmembers) who are temporarily unemployed and who are Illinois licensed attorneys with a demonstrated financial hardship. Scholarships will be reviewed and provided upon application on a case-by-case basis. Attorneys who qualify will receive at least a 50% reduction in the conference fee (which does not include any reduction or reimbursement for meals, lodging, or travel costs associated with the seminar). To request information on whether you might qualify, please contact us at meetings@tei.org.

Questions?

Call TEI at 202.638.5601, email to meetings@tei.org or visit www.tei.org. Click on "Continuing Education."



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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.

Date	June 13-14, 2019
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 effectively communicate and constructively interact with their teams, departments, and companies.
Prerequisite	No prerequisites.
Advanced Preparation	No advanced preparation required.
CPE Credit	18.5 Maximum credits for two-day program (based on a 50-minute hour).
CLE Credit	15.5 Maximum credits for two-day program (based on a 60-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.



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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. Applicants are encouraged to register via www.tei.org. Credit card registrations may be faxed to 202.638.5607 or 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 _____

Nickname for Badge _____

Company _____

Mailing Address _____

City _____

State/Province _____ Zip/Zone _____

Telephone _____ Fax _____

Email _____

FEES

Amount (U.S. Funds)

\$950 Member Fee

\$1,150 Non-Member Fee

Charge to: VISA MasterCard American Express Discover Diners Club

Card Number _____

Exp. Date _____ CVV _____

Cardholder Name (print) _____

Signature _____

If faxing your registration using a credit card, please do so between 9:00 am and 4:00 pm ET to ensure confidentiality. Fax number for registrations and cancellations is 202.638.5607. This form can be scanned and emailed to meetings@tei.org.

All cancellations must be made in writing by 4:00 pm ET on May 17, 2019, and will be subject to an administrative service charge of \$75 (U.S.); for cancellations after May 17, 2019 (the date handout materials become available) and before May 24, 2019, the charge will be \$200 (U.S.) No refunds will be made for cancellations received after May 24, 2019, 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. 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 course registration fee attributable to food and beverage is \$400 (U.S.).