



# Managing Tax Complexity—2018 and Beyond

## SEMINAR

Emerging Issues and Best Practices:  
A Holistic Approach

September 27, 2017  
The Conference Board Conference Center  
New York, NY

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# Agenda

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## Wednesday, September 27, 2017

Breakfast and Registration: 8:00–9:00 am

Opening Remarks: 9:00–9:15 am

**Ramona Dzinkowski**, Program Director,  
**The Conference Board**

9:15–10:15 am

### US Tax Reform Update

The US tax environment is in a state of flux. The outcome of current proposals on the table will have significant implications for corporate tax strategies and practices. Hear about the latest developments in US tax reform and how these are likely to impact US companies and the US economy from a macro perspective. Our expert will take you through some of the most significant developments to date and the ongoing debates over tax inversions, the financing of tax reform, the Border Adjustment Tax (BAT), the taxation of global income, the corporate tax rate, repatriation of foreign earnings, and movement towards a more consumption-based tax system (with expensing of corporate investment and deductibility of interest).

**Michael Minihan** - Principal, International Income Tax, **Ryan LLC**

10:15–10:30: Coffee and networking break

10:30–11:30 am

### Emerging Global Tax Issues that Will Impact Your Company

As the US government moves toward corporate tax reform, international forces are at play that will also impact corporate US tax strategies and practices into 2018 and well beyond. New York University Professor John P. Steines, author of *International Aspects of US Income Taxation* and former editor-in-chief of the *Tax Law Review*, will discuss emerging trends in international tax policy, the changing global tax landscape, and the likely impact on dealings between countries in future. He will also review the approach being taken by a range of countries to implement OECD/EU Base Erosion and Profit Sharing (BEPS) and some unilateral measures that are being adopted. He will also cover critical implementation challenges for countries and US companies specifically.

**John P. Steines**, Professor of Law, **New York University**

11:30 am–12:30 pm

### Planning for a New Era in Tax Management

Tax planning in a fluid and uncertain environment is a challenge for all companies regardless of industry, corporate structure, or company size. Local statutes are changing along with domestic regulations and international policies, creating a labyrinth of issues that not only impact corporate tax practitioners but also has implications across the entire enterprise. This panel will present the views and best practices of senior tax executives at several of America's leading companies.

Through an interactive discussion, they will provide insights on how the emerging domestic and global tax issues are being monitored, managed, and evaluated in terms of risk exposure in their companies, with respect to the impact on corporate taxation, as well as on management processes and systems across the business.

Moderator:

**Diane Lim** Principal Economist, **The Conference Board**

Panel:

**Charles Lennox** Vice President, Tax, **Con Edison**

**Matt O'Laughlin** Executive Vice President, Global Tax, **PVH Corp.**

**Joshua A. Gordon** Vice President - International Tax, **IBM**

12:30–1:30 Networking and lunch break

1:30–2:30 pm:

### Tax Governance, Transparency, and Ethics

Governmental authorities, shareholders, and public opinion are all calling for greater tax transparency from US and global companies, particularly as it relates to corporate reorganization and what are often considered tax avoidance practices. Tax heads must make a concerted effort to enhance accountability and transparency if they are to meet the standards expected of them. This session will discuss the evolving tax governance, transparency, and ethics environment that tax executives must be aware of both internationally and in the US, and will explain in depth what companies need to do now to meet increasingly complex standards and guidelines and the growing public scrutiny of their tax practices.

**Diane Lim** Principal Economist, **The Conference Board**

2:30–3:30 pm

## **Transforming the Tax Function—Best Practices in Tax Integration and Automation**

Within the evolving tax environment, tax managers are facing new challenges around compliance, process, and data requirements that will eventually lead to a transformational overhaul of their tax functions. Integrating the tax function across the entire organization is essential. Companies must design a strategic road-map for transforming the tax function, determine key drivers for change, and evaluate what it all means for their current tax model. Tax managers will be asking themselves: What is the role of big data and artificial intelligence? What systems improvements need to be made to ensure a seamless flow of information between business units, functions, and managers; and what assurances need to be put in place around data security, internal controls and audit to create a wholly-integrated, effective tax management system?

This session will demonstrate benchmarks in leading companies that have taken on the tax transformation imperative. Tax experts will provide their insights on how to build a tax transformation roadmap that best suits your company, including a discussion of best practices in integration, automation, internal control and security that will help reduce tax risk and help to integrate the tax function across your enterprise.

**Tracy Davis**, End to End Solution Owner, Americas, Indirect Tax, **Vertex Inc.**

**Kendall Smith**, Senior Global Client Leader, Income Tax, **Vertex Inc.**

3:30–3:45: Coffee and networking break

3:45–4:45 pm

## **Tax/Finance Integration and Automation: Lessons from the Leaders in Connecting the Dots**

Opportunities for managing tax complexity and transforming the tax function abound, but can't be taken in isolation. The necessary changes required in facing evolving regulatory demands, technological developments, and opportunities to reduce risk/ improve control will require a cross- functional, team-based approach. Our panel of experts from finance, tax and tax/finance automation will discuss both the opportunities and the challenges they have encountered in their companies in tax/finance integration and automation, and will provide their insights on missteps to be avoided and best practices to adopt in your company.

**Katherine M Cohane**, Vice President - Global Tax Accounting, Reporting & Technology / U.S Tax Compliance, **American Express Company**

**Kirsten Nordlof**, Vice President, Finance, **Autodesk**

**Ketan B. Patel**, VP Finance, Head of Tax Technology, **Morgan Stanley**

4:45–5:00 pm: Closing Remarks

**Ramona Dzinkowski**, Program Director, **The Conference Board**

# REGISTRATION INFORMATION

**Online** [www.conferenceboard.org/tax](http://www.conferenceboard.org/tax)  
**Email** [customer.service@conferenceboard.org](mailto:customer.service@conferenceboard.org)  
**Phone** **212.339.0345**  
*8:30 am–5:30 pm ET, Monday–Friday*

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<b>Members</b>	<b>\$1,035</b>
<b>Non–Members</b>	<b>\$1,235</b>

Fees do not include hotel accommodations.

## Location

**The Conference Board, Conference Center**  
845 Third Avenue (Between 51<sup>st</sup> and 52<sup>nd</sup>)  
New York, NY 10022  
Tel: **(212) 339-0345**

## Cancellation Policy

Full refund until three weeks before the meeting. \$500 administration fee up to two weeks before the meeting. No refund after two weeks before the meeting. Confirmed registrants who fail to attend and do not cancel prior to the meeting will be charged the entire registration fee.

## Team Discounts per Person

For a team of three or more registering from the same company at the same time, take \$150 off each person's registration. One discount per registration. Multiple discounts may not be combined.