



Region 9 Conference

Hilton Bellevue Washington

May 8 – 10, 2023



MONDAY, MAY 8

	7:30 AM - 8:30 AM	Morning Workout*
	9:00 AM - 9:15 AM	Welcome
FED	9:15 AM - 10:30 AM	Session 1 PwC: Policy Ping Pong by Dallas Dolen
	10:30 AM - 10:45 AM	Break
INTL	10:45 AM - 12:00 PM	Session 2 Eversheds-Sutherland: International (BEPS - Pillar 2) Operational Challenges
	12:00 PM - 1:00 PM	Lunch
SALT	1:00 PM - 2:15 PM	Session 3 RSM: SALT Policy
	2:15 PM - 2:30 PM	Break
FED	2:30 PM - 3:45 PM	Session 4 Deloitte: Transfer Pricing
	3:45 PM - 4:00 PM	Break
INTL	4:00 PM - 5:15 PM	Session 5 DLA Piper: International (FTC Regs)
	6:00 PM	DLA Piper Dinner
	8:00 PM	Bloomberg Dessert and Drinks

TUESDAY, MAY 9

	7:30 AM - 8:30 AM	Waking up with taxnotes (and yoga)
	8:00 AM - 8:45 AM	Eversheds-Southerland: SALT Coffee Chat
	9:00 AM - 9:15 AM	Welcome
FIN	9:15 AM - 10:30 AM	Session 6 KPMG: Hot Topics in Tax Accounting
	10:30 AM - 10:45 AM	Break
FED/TBD	10:45 AM - 12:00 PM	Session 7a Grant Thornton: Federal Tax Legislative Update Session 7b Morgan Lewis: SALT M&A
	12:00 PM - 1:00 PM	PwC Lunch: TBD
SALT/M&A	1:00 PM - 2:00 PM	Session 8a: Duane Morris: SALT Session 8b: DLA Piper: M&A
	2:00 PM - 2:15 PM	Break
CTM/R&D	2:15 PM - 3:15 PM	Session 9a Covington & Burling: Hybrid & Remote Workforce Session 9b DST Advisory: R&D Credits & Capitalization
TECH	3:30 PM - 4:30 PM	Session 10 MASSIE R&D Tax Credits: Using Technology to Bring Your Credit Process into the Future
	4:45 PM - 6:00 PM	Vendor Cocktail Reception with hors d'oeuvres
	6:40 PM	Deloitte Baseball Game

TRACK DESIGNATIONS: Educational tracks are identified throughout the program as follows:

- | | | |
|--------------------------------|------------------------------------|------------------------------|
| FED – Federal Tax | IRSAA – IRS Administrative Affairs | TECH – Tax Technology |
| FIN – Financial Reporting | INTL – International Tax | SALT – State & Local Tax |
| CTM – Corporate Tax Management | M&A – Mergers & Acquisitions | R&D – Research & Development |

TEI's Region 9 Conference Tax of the Future (Tax Policy Ping Pong)

WEDNESDAY, MAY 10

	7:30 AM - 8:30 AM	Morning Workout*
	9:00 AM - 9:15 AM	Welcome
IRSAA	9:15 AM - 10:30 AM	Session 11 EY: IRS Controversy
	10:30 AM - 10:45 AM	Break
FED	10:45 AM - 12:00 PM	Session 12 Andersen Tax: IRA - BMT, Excise, & Investment Tax Credits

* We will offer morning workouts prior to the educational sessions. We will offer both walking and running opportunities.



Region 10 Conference Sponsors

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RSM

Bloomberg
Tax

FED – Federal Tax
FIN – Financial Reporting
CTM – Corporate Tax Management

IRSAA – IRS Administrative Affairs
INTL – International Tax
M&A – Mergers & Acquisitions

TECH – Tax Technology
SALT – State & Local Tax
R&D – Research & Development

ELIGIBILITY TO ATTEND: Registration is open to TEI members and other in-house tax professionals. Individuals engaged in private law, accounting, or other consulting practice are ineligible to attend.

REGISTRATION FEES: \$600

REGISTRATION PROCEDURE: Please register online at <https://www.eventbrite.com/e/494439169867>

Date: TEI's Region 9 Conference, May 8-10, 2023

Prerequisites: None

Fields of Study: Taxes

Delivery Method: Group Live

Program Level: Overview

Advanced Preparation: No advanced preparation required

Registration cutoff **Tuesday, April 25, 2023**

LEARNING OBJECTIVES: To provide updates on legislative, regulatory, and judicial developments relating to international, indirect, and direct tax, corporate tax management and tax controversy, as well as to analyze the effect of financial reporting developments and tax technology on the effective operation for corporate tax departments.

CPE/CLE CREDIT INFORMATION:

CPE

TEI Region 9 and Region 10 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 submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

CPE CREDITS POSSIBLE: APPROXIMATELY 18

SPONSOR ORGANIZATION: TEI REGION 9 AND REGION 10

Jonnell Quarrie, c/o MOD PIZZA, 16615 71st Pl W, Lynnwood, WA 98037

CLE

TEI Seattle Chapter will offer CLE. Additional details to follow.

HOTEL INFORMATION: A discounted block of sleeping rooms is being held at the Hilton Bellevue for TEI Region 9 Conference Attendees. TEI's discounted sleeping room rate is \$299 + tax per night. Click [HERE](#) to make your reservations online. Do not attempt to call into the hotel directly, they will not be able to help you with a reservation under our block, all reservations must be made using our reservations link. Our room block is limited and will likely sell out so do not delay in making your reservations.

HOTEL ADDRESS:

Hilton Bellevue
300 112th Ave SE
Bellevue, WA 98004
(p) (425) 455-1300

CANCELLATION AND SUBSTITUTION POLICY

All cancellations must be made in writing by 4:00 pm PT on April 10, 2023, and will be subject to an administrative service charge of \$75 (USD). For cancellations after April 10, 2023 and before April 20, 2023, the charge will be \$200 (USD). No refunds will be made for cancellations received after April 20, 2023 and for no-shows. Cancellations must be received in writing to stephen.dunphy@ros.com. Refunds of credit card registrations, less administrative charge, will be made to credit card account.

Substitution requests should be emailed to stephen.dunphy@ros.com and are subject to a \$50 (USD) fee.

COMPLAINT RESOLUTION POLICY

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QUESTIONS:

Stephen Dunphy, RVP Region 9

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