

TAX COUNCIL POLICY INSTITUTE



TAX POLICY
& PRACTICE
SYMPOSIUM

Tax in a Time of Global Disruption

The Future Accelerated & Transformed



DIGITAL EVENT | FEBRUARY 10–12, 2021

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TAX COUNCIL POLICY INSTITUTE



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& PRACTICE
SYMPOSIUM

December 14, 2020

Dear Colleague,

The Tax Council Policy Institute (TCPI) invites you to participate in our 22nd Annual Tax Policy and Practice Symposium, "**Tax in a Time of Global Disruption: The Future Accelerated & Transformed**," to be held February 10-12, 2021 virtually – the first time in the history of our organization!

Join a focused, hands-on, educational assembly of more than 40 presenters representing tax leaders from business, government, and academia for a unique three-day symposium with four to five hours of programming each day as we learn about and explore emerging policy considerations, share insights, and exchange practical strategies while we prepare for the future of tax in 2021 and beyond.

The 2021 program will explore the full range of tax implications of the global disruptions of 2020, from shifts in tax and economic policy to changes in global business operations to managing the tax function with more responsibilities and fewer resources. Looking ahead through a post-election lens, the program will focus on the advances that can come from embracing the opportunities for realignment and reprioritization that are arising from this period of disruption.

Be on the forefront of the discussion! Join us in dissecting this important tax topic which crosses all industry lines and that impacts your country and your company. Please follow our Twitter account @TCPI_DC for the latest information and use the hashtag #TCPISymp during the conference for conversations and networking opportunities. Make plans to attend this premier event and participate in sharing perspectives and understanding how current, proposed and possible future changes may impact your tax planning practices and structures.

TCPI is a highly respected non-profit and non-partisan public policy research and educational organization that is run by tax professionals for tax professionals. It has been sponsoring exceptional tax programs and conferences for more than 21 years. Our symposia are renowned for facilitating the opportunity for leading tax professionals and policy makers from government, academia, and business to fully explore all aspects of current tax topics. Thousands of tax professionals from around the world have attended our two-day conferences and webcasts. If you are not already involved in TCPI's mission, we invite you to contact us for more information.

On behalf of the TCPI and the Symposium Program Manager, EY, we look forward to seeing you in February.

Sincerely,

A handwritten signature in black ink that reads "Lynda K. Walker".

Lynda K. Walker, Esq.
Executive Director and General Counsel
Tax Council Policy Institute

A handwritten signature in blue ink that reads "Sharon Heck".

Sharon Heck
Chair, TCPI Board of Directors
Corporate Vice President, Treasurer and Chief Tax Officer
Intel Corporation

TCPI 2021 Planning Committee

Program Manager

Barbara Angus
Global Tax Policy Leader
EY

Planning Committee

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Vice President, Tax &
Accounting
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Assistant Treasurer, and Global
Tax Operations
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Anthony Gedeller
Global Tax & Currency Director
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Holly Goughnour
Vice President, Tax
International Paper

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Sharon Heck
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Corporate Vice President, Tax
*Raytheon Technologies
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Head of Global Tax Policy
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Eli Lilly and Company

Chris Miller
Senior Vice President, Tax
T-Mobile

Paul Nolan
Vice President, Tax &
Government Affairs
McCormick & Company, Inc.

Tim Raymond
General Tax Counsel -
Downstream
Exxon Mobil Corporation

Scott Reents
Vice President, Tax and
Treasury
Corporate Treasurer
AbbVie Inc.

Thomas Roeser
GM, Tax Policy Counsel
Microsoft Corporation

Saul Rosen
Senior Tax Counsel and
Managing Director
Citigroup

Urvi Doshi Sood
Vice President, Taxes &
General Tax Counsel
Lockheed Martin Corporation

Shannon Stafford
Managing Director
The Carlyle Group

John Stowell
Senior Vice President,
Corporate Tax
The Walt Disney Company

Lisa Wadlin
Chief Tax Officer
Netflix

Louise Weingrod
Vice President, Global Taxation
Johnson & Johnson

Teri Wielenga
Vice President, Global Head of
Tax
Gilead

Chad Withers
Chief Tax Officer
Caterpillar Inc.



TCPI 2021 Planning Committee

Program Manager Advisory Committee

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Legislative and Regulatory
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Jon Traub

Managing Principal, Tax Policy
Group
Deloitte Tax LLP



2021 Symposium Faculty

Speakers are still being finalized for the program and the list will be updated periodically on the TCPI website at www.tcpi.org

Douglas Bell
Global Trade Policy Leader
EY

Timothy G. Berger
Executive Vice President - Tax
Mastercard Worldwide

Rebecca Burch
Senior Manager
Washington Council Ernst & Young

George Callas
Managing Director,
Government Affairs & Public Policy
Step toe & Johnson

Robert Carroll
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EY

Francois Chadwick
Vice President, Tax & Accounting
Uber

Manal Corwin
National Service Line Leader for International Tax, and Principal-in-Charge of Washington National Tax – International Tax Policy
KPMG

Jacqueline Crouse
Vice President, Tax
Amgen Inc.

Nikki Flom
Tax Director
Facebook

Tadd Fowler
Vice President – Treasury, Assistant Treasurer, and Global Tax Operations
Procter & Gamble

Jeffrey Gerrish
Partner, CFIUS and Foreign Investment Reviews; National Security; International Trade
Skadden Arps Slate Meagher & Flom

John Gimigliano
Principal in Charge, Federal Legislative and Regulatory Services
KPMG

Adrian Guarneros
Tax Technology Transformation (TTT) Leader
EY Mexico - Colombia

Melissa Hall
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Assurant Inc.

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Managing Director
Andersen

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Global Tax and Finance Operate Leader
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Corporate Vice President, Tax
Raytheon Technologies Corporation

Ron Lang
Chief Tax Officer
Ford Motor Company

Katie Lodato
Vice President, Global Tax
Eli Lilly and Company

Sarah McGill
Senior Vice President, Tax
PepsiCo, Inc.

Chris Miller
Senior Vice President, Tax
T-Mobile

Maria Minetti
Head of Global Tax Planning
CBRE

Michael Mundaca
US National Tax Department Leader
EY

Monica Neufang
Vice President, Enterprise Governance
Johnson & Johnson

Paul Nolan
Vice President, Tax & Government Affairs
McCormick & Company, Inc.



Loren Ponds
Member
Miller & Chevalier Chartered

Thomas Roesser
GM, Tax Policy Counsel
Microsoft Corporation

Karl Russo
Director, National Economics
and Statistics
PwC

Hemal Shah
Director, Policy – International
Trade and Intellectual Property
Gilead

Urvi Doshi Sood
Vice President, Taxes &
General Tax Counsel
Lockheed Martin Corporation

Bob Stack
Managing Director,
International Tax Group
Washington National Tax
Deloitte Tax LLP

Shannon Stafford
Managing Director
The Carlyle Group

Jon Traub
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Stef van Weeghel
Global Tax Policy Leader
PwC

Lisa Wadlin
Chief Tax Officer
Netflix

Louise Weingrod
Vice President, Global Taxation
Johnson & Johnson

Teri Wielenga
Vice President, Global Head of
Tax
Gilead

L. Randall Wray
Senior Scholar, Levy
Economics Institute and
Professor of Economics
Bard College



Program Agenda: Day One

Day One: Wednesday, February 10

10:00 a.m. – 10:10 a.m.

Welcome Remarks and Recognition of Symposium Mission

10:10 a.m. – 11:00 a.m.

Corporate Keynote Session

11:00 a.m. – 11:10 a.m.

Break

11:10 a.m. – 12:00 p.m.

The Fiscal and Economic Outlook and The Role of Deficits – *Will the headlines be “Incrementalism After the Vaccine,” “Modern Monetary Theory Writ Large” or “The Return of the Deficit Hawks?”*

The federal government's fiscal outlook has been greatly impacted by COVID-19, with a significant increase in federal government debt and a more expansive role by the Federal Reserve. President-elect Biden has proposed significant increases in federal spending and taxes. This panel will discuss economic trends, the fiscal outlook, and the role of the federal government deficit and debt, including an exploration of Modern Monetary Theory.

12:00 p.m. – 12:50 p.m.

Breakout roundtable discussions on economic and business environment

12:50 p.m. – 1:40 p.m.

Changing Global Business Models and “Made in America” Initiatives

Hear tax executives and trade experts discuss how tax, trade, and other policies weigh into supply chain determinations and global business models. The panel will also discuss how pivots from pre-pandemic to the pandemic are impacting decision making for 2021 and beyond. Panelists will debate how tax and trade policies may change with the elections, including a discussion on “Made in America” initiatives, with a focus on how these potential future policy changes will impact supply chains and how any resulting alterations to supply chains will be implemented.

1:40 p.m. – 1:50 p.m.

Break

1:50 p.m. – 2:40 p.m.

Global Tax Policy: Evolution, Revolution or Chaos

Much has changed since the OECD launched its original base erosion and profit shifting project back in 2013. As the OECD, UN, EU and individual countries consider fundamental changes to the international tax architecture, multinationals must navigate an increasingly complex environment of uncoordinated measures. Hear how companies are managing this uncertainty and the steps they are taking to anticipate and prepare for potential global tax policy transformation.

2:40 p.m. – 2:45 p.m.

Day One Closing / Preview of Day Two



Program Agenda: Day Two

Day Two: Thursday, February 11

10:00 a.m. – 10:05 a.m.

Welcome Back

10:05 a.m. – 10:35 a.m.

IRS Interview

10:35 a.m. – 11:25 a.m.

Tax Administration in the Digital Age – Sync or Swim?

Tax administrations around the world are increasingly going digital. At the same time, taxpayers have increased their use of technology. Panelists will discuss the experience to date with digital developments in tax, what they see coming next, and the extent to which tax administration and taxpayer approaches to digitalization sync up or are destined to collide.

11:25 a.m. – 11:35 a.m.

Break

11:35 a.m. – 12:25 p.m.

Changing Workforce Dynamics – Challenges and Opportunities

The COVID-19 pandemic has not only fundamentally changed our lives and the economy, but how companies conduct business. This session will focus on changing workforce dynamics and how companies are adapting to work-from-home protocols that are increasingly looking like the new normal. Please join this diverse panel for a discussion of how companies are approaching this changing environment, adjusting their internal policies and practices, and planning to navigate an uncertain future. The panel will also discuss what risks, requirements, and considerations are at play for remote workforces, and what tax policy changes should be considered both state-to-state and internationally.

12:25 p.m. – 1:15 p.m.

Breakout roundtable discussions on changing workforce dynamics

1:15 p.m. – 2:05 p.m.

Leading the Tax Function Through the Many Dimensions of Change

The pandemic has added new challenges to changes that heads of tax already were confronting in managing their tax functions. This panel will explore navigating an environment in which the necessary skills for a tax function and the workplace itself are rapidly shifting, tax policy is anything but stable, and the very nature of a company's tax function is being reimaged. The panel also will examine how these changes affect the ways that heads of tax identify and engage with stakeholders in all directions – up, down and laterally.

2:05 p.m. – 2:10 p.m.

Day Two Closing / Preview of Day Three



Program Agenda: Day Three

Day Three: Friday, February 12

10:00 a.m. – 10:05 a.m.

Welcome Back

10:05 a.m. – 10:55 a.m.

Keynote Address

10:55 a.m. – 11:05 a.m.

Break

11:05 a.m. – 11:55 a.m.

New Revenue Sources Aligned with New Policy Priorities

Increasing federal spending, rising federal debt, and possible shifts in domestic policy all are likely to put additional pressure on the federal government's fisc. This panel will discuss possible additional revenue sources – both big and small – in the context of various policy objectives such as addressing income and wealth inequality, climate change, and competitiveness and trade policy.

11:55 a.m. – 12:45 p.m.

Breakout roundtable discussions on where we go from here

12:45 p.m. – 1:35 p.m.

Tax and Social Responsibility – Bedfellows for a New Era

Environmental, social and corporate governance (ESG) matters have recently moved to the center of the public company agenda and routinely now include a focus on tax. Join us for a discussion with Tax VPs and an ESG officer about how companies are evaluating these evolving developments and aligning the tax element of their public profiles.

1:35 p.m. – 1:45 p.m.

Break

1:45 p.m. – 2:35 p.m.

The Path Forward – Embracing the Opportunities

The events of the past year have brought dramatic change affecting all aspects of tax. With transformational change come opportunities to refocus, realign, and reprioritize. This panel of experts will look at the tax and economic agenda of the new US administration and the role it will play in the global tax dialogue. Panelists will share their perspectives on how the tax community can work together to help shape the future for 2021 and beyond.

2:35 p.m. – 2:45 p.m.

Closing Remarks



Additional Information

Who Should Attend?

The program is designed for CFOs, VPs of Tax, VPs of Finance, corporate tax directors, government tax professionals, tax counsels, attorneys, and managers. The method of delivery will be group internet-based at an intermediate level. Participants should possess an intermediate knowledge of tax policy and practice.

Virtual Event Space

The 2021 program will be broadcasted via a state-of-the-art and intuitive platform that allows attendees to easily access livestreams and presentations, and make connections with other attendees, speakers, and exhibitors. Some of the features include:

Video Breakout Sessions – High-value breakout sessions conducted via live video group sessions

Live Polls – Attendees can engage with speakers in real-time by giving feedback during livestreams, then share the results live

Session Q&A – Real-time and moderated Q&A during livestream

Networking – Attendees will be able to create detailed profiles and connect and interact with fellow attendees via 1:1 chat (text or video)

TCPI Online

For more information about the 22nd Annual Tax Policy & Practice Symposium or to learn more about past events or TCPI, please visit the TCPI website at www.tcpi.org. We will post periodic updates on the 2021 event. **Website registration is encouraged.**



Additional Information

Continuing Education

Learning Objective – To learn about and explore emerging policy considerations, share insights, and exchange practical strategies to help be better prepared for the future of tax in 2021 and beyond.

Participation in the symposium will allow you the opportunity to receive continuing education credits. TCPI is registered with NASBA, and in accordance with its policies, up to 13 CPE credits can be earned. **(NASBA Field of Study: TAXATION.)**

TCPI will also apply for CLE accreditation from those states that require it, which participants list on their registration form. The total amount of earned CLE credits varies by states.



The Tax Council Policy 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 through its website: www.nasbaregistry.org.

Registration Information

Registration

Register early to receive a discount!

Registration form and payment received online or postmarked:

Full Conference (By January 8, 2021)	\$699
Full Conference (After January 8, 2021)	\$825
Single Day Ticket	\$300
Two-Day Ticket	\$600
Government employees and members of academia (full-time students and faculty)	\$250

To pay by credit card, please visit our website at www.tcpi.org.

To pay by check or to request an invoice, please return the enclosed registration form.

Cancellation and Refund

Fees are refundable, less a \$100 processing fee, if written notice is received by TCPI prior to January 8, 2021.

There will be no refunds after January 8, 2021; however, a substitute for the original registrant will be accepted. For more information regarding registration, refund, complaint, hardship policy, and/or program cancellation policies, please email TCPI at symposium@tcpi.org.



Symposium Exhibitors



Registration Form

**Online registration at www.tcpi.org is strongly encouraged.*

Name: _____

Title: _____

Company: _____

Address 1: _____

Address 2: _____

City: _____ State: _____ Zip: _____

Phone: _____

Email: _____

- I would like to receive CPE accreditation (no selection required)
- I would like to receive CLE accreditation for the following state(s): _____

I would like to attend:

- \$699 Full Conference (payment postmarked by January 8, 2021)
- \$825 Full Conference (payment postmarked after January 8, 2021)
- \$300 Single Day Ticket – Choose day (check one): ___ Feb. 10; ___ Feb. 11; ___ Feb. 12
- \$600 Two-Day Ticket – Choose days (check two): ___ Feb. 10; ___ Feb. 11; ___ Feb. 12
- \$250 Government employees and members of academia (full-time students and faculty)
- Please invoice me

To pay by credit card, please visit our website at www.tcpi.org.

To pay by check, make checks payable to **Tax Council Policy Institute**, and mail your registration form and check to:

Tax Council Policy Institute
600 13th Street, NW
Suite 1000
Washington, DC 20005

About the Tax Council Policy Institute

The Tax Council Policy Institute is a non-profit and non-partisan public policy research and educational organization. Its mission is to bring about a better understanding of significant tax policies that impact our national economy and businesses through careful study, thoughtful evaluation and open discussion. TCPI accomplishes its mission in various ways such as hosting an Annual Tax Policy and Practice Symposium in Washington, DC and sponsoring mini-symposia on important tax issues, which are largely conveyed via webcast.

Prior Symposia

- 2020** Hindsight is 2020: What the TCJA and Global Developments Tell Us About the Future of Tax
- 2019** The Evolving Boundaries of Tax
- 2018** Disruption and opportunity in the era of global tax transformation
- 2017** Tax Policy in Transition: Diverging Views in a Converging World
- 2016** Capital Matters: How Taxes Influence the Global Creation, Deployment, and Mobility of Capital
- 2015** How Taxes Matter: The Globalization of Tax Policy and Implications for US Economic Growth and Investment
- 2014** Why Taxes Matter: The Implications of Tax Policy on Strategic Business Decisions
- 2013** Taxation of Intangibles: Implications for Growth, Jobs and Competitiveness
- 2012** The New Realities of Tax Risk Management: Navigating Risk in a Complex World
- 2011** Tax Uncertainties in a Deficit-Driver World: Designing a Blueprint for Leadership
- 2010** Tax Reform: In Search of a 21st Century U.S. Tax System
- 2009** Certainty in an Uncertain World? Resolving Cross-Border Controversies
- 2008** Future Shock? Impact of U.S. Fiscal Policy on Corporate Taxation
- 2007** Understanding the Global Tax Arena: Risk & Regulation
- 2006** The Corporate Tax Practice in the Age of Transparency: A Path Forward
- 2005** The U.S. International Tax Regime: Confronting the Challenge of the Evolving Global Marketplace
- 2004** The Corporate Tax Practice: Responding to the New Challenges of a Changing Landscape
- 2003** Jurisdiction to Tax in the New Economy: International, National, and Sub-National Perspectives
- 2002** The Future of International Transfer Pricing: Practical and Policy, Opportunities
- 2001** The R&D Tax Credit in the New Economy
- 2000** INDOPCO: Past, Present and Future