

**Deloitte.**



**Greater Washington Area  
Tax Symposium**

December 5, 2017

# Welcome

Welcome to the fourth annual Greater Washington Area Tax Symposium! Today, you will have an opportunity to network with your peers and share perspectives on the ever-changing business issues facing tax departments. We offer a mix of plenary and breakout sessions, allowing you to focus on the tax issues most relevant to your organization.

The political and legislative landscape continues to transform, leaving tax executives with uncertainty while managing the resulting impacts on their organizations. Further, organizations continue to assess technology to improve data and processes to elevate the tax function. This unprecedented change in global tax laws and advancements in technology present a unique opportunity to Navigate Change to unlock potential value, address risks, and enhance the tax function's value to the organization. We hope you gain insights on these issues from today's discussions.

We look forward to seeing you at our symposium each year and trust that you will find this time well spent. Should you want to explore any of the topics we cover today in greater depth, don't hesitate to contact your Deloitte contact or me directly at [jblank@deloitte.com](mailto:jblank@deloitte.com).

We are delighted that you could join us.



Jeremy Blank  
Managing Partner  
Greater Washington Tax Practice  
Deloitte Tax LLP



# Today at a glance

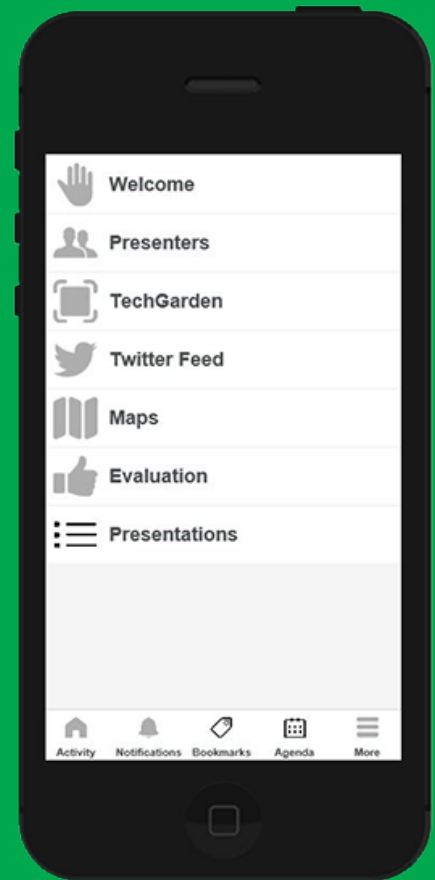
Time	Location	Program Segment Description	Presenters
8:30 a.m.–8:45 a.m.	International A and B	Welcome remarks	Tamika Tremaglio and Jeremy Blank
8:45 a.m.–10:00 a.m.	International A and B	Tax accounting and provisions: Current issues, practical responses	Chris Barton, Jeff Clegg, and Evan Shea
10:00 a.m.–10:15 a.m.	<b>REFRESHMENT BREAK</b>		
10:15 a.m.–11:30 a.m.	<b>BREAKOUT SESSION I</b>		
	Beverly	Two sides of M&A: Acquiring and divesting	Matt Boyle and Wesley Chapman
	Dallas	Mitigating risks of a global workforce	Ron Arculeo, Nazanin Azarian, and Francoise Dinkins
	International C	Tax reform: Navigating the uncertainty	Jeff Ausnehmer, Matt McKinney, and Eric Peel
11:30 a.m.–11:45 a.m.	<b>MOVE TO WORKING LUNCH</b>		
11:45 a.m.–1:10 p.m.	<b>WORKING LUNCH</b>		
	International A and B	Luncheon address: Tax policy update	Jeff Kummer
1:10 p.m.–1:25 p.m.	<b>MOVE TO BREAKOUT SESSIONS</b>		
1:25 p.m.–2:40 p.m.	<b>BREAKOUT SESSION II</b>		
	Beverly	Life in the post-BEPS world	Miles Humphrey and Jeff Mehr
	International C	New revenue recognition and leasing standards	Isa Farhat, Robert Hall, Matt McKinney, and Elizabeth Rothwell
	Dallas	Multi-state planning in a digital world	Scott Frishman, Andy Gold, and Ann Kamasky
2:40 p.m.–2:55 p.m.	<b>MOVE TO BREAKOUT SESSIONS</b>		
2:55 p.m.–4:00 p.m.	<b>BREAKOUT SESSION III</b>		
	Beverly	Tax operating models	Brad Ford and Amy Shanes
	Dallas	Federal and state tax controversy updates	Michael Bryan, Scott Frishman, John Keenan, and Rosemary Sereti
	International C	Tax reform, recent transfer pricing cases, country-by-country reporting, and impact on IP planning	Viet Dinh, Aydin Hayri, and Arindam Mitra
4:00 p.m.–4:15 p.m.	<b>REFRESHMENT BREAK</b>		
4:15 p.m.–5:30 p.m.	International A and B	Closing Plenary Session: New technology has made its way to the tax department: What you should know	Craig Darrah, Mike Hoover, and Maheswar Marepalli
5:30 p.m.–6:30 p.m.	The International Foyer and Atrium	TechGarden and cocktail reception	

# Technology instructions

## App for smartphones and tablets

1. Open up the App Store or Google Play on your smartphone
2. Search **Deloitte US Events**
3. Download **Deloitte US Events** by DoubleDutch
4. Enter the email address you used to register for the event and click **submit**
5. Enter password: **deloitte** (case sensitive)
6. Enter company name and title or connect to your LinkedIn or Twitter social accounts to post directly from the app
7. Navigate through app to find information on your personalized agenda, speakers, presentations, and much more

Please see the Event App support help desk onsite with any questions or issues.





# Deloitte Presenters

<b>Tax accounting and provisions: Current issues, practical responses</b>	<b>Chris Barton</b> Tax Managing Director +1 703 885 6300 cbarton@deloitte.com	<b>Jeff Clegg</b> Tax Partner +1 703 251 1580 jclegg@deloitte.com	<b>Evan Shea</b> Tax Partner +1 703 251 1274 evshea@deloitte.com
<b>Two sides of M&amp;A: Acquiring and divesting</b>	<b>Matt Boyle</b> Tax Senior Manager +1 571 766 7663 maboyle@deloitte.com	<b>Wesley Chapman</b> Tax Partner +1 404 631 3283 wchapman@deloitte.com	
<b>Mitigating risks of a global workforce</b>	<b>Ron Arculeo</b> Tax Managing Director +1 215 299 4634 rarculeo@deloitte.com	<b>Nazanin Azarian</b> Tax Senior Manager +1 703 251 3826 nazarian@deloitte.com	<b>Francoise Dinkins</b> Tax Managing Director +1 703 251 1409 frdinkins@deloitte.com
<b>Tax reform: Navigating the uncertainty</b>	<b>Jeff Ausnehmer</b> Tax Partner +1 703 251 4131 jeausnehmer@deloitte.com	<b>Matt McKinney</b> Tax Senior Manager +1 704 227 1345 mmckinney@deloitte.com	<b>Eric Peel</b> Tax Partner +1 212 436 4714 epeel@deloitte.com
<b>Tax policy update</b>	<b>Jeff Kummer</b> Director of Tax Policy +1 202 220 2148 jkummer@deloitte.com		
<b>Life in the post-BEPS world</b>	<b>Jeff Mehr</b> Tax Principal +1 571 766 7391 jmehr@deloitte.com	<b>Miles Humphrey</b> U.K. Deloitte Partner +1 212 436 6184 milhumphrey@deloitte.com	
<b>New revenue recognition and leasing standards</b>	<b>Isa Farhat</b> Advisory Partner +1 571 882 7698 ifarhat@deloitte.com	<b>Robert Hall</b> Audit and Assurance Partner +1 703 251 1240 rshall@deloitte.com	<b>Matt McKinney</b> Tax Senior Manager +1 704 227 1345 mmckinney@deloitte.com
	<b>Elizabeth Rothwell</b> Tax Managing Director +1 703 251 1321 erothwell@deloitte.com		



# Deloitte Presenters

<b>Multi-State planning in a digital world</b>	<b>Scott Frishman</b> Tax Principal +1 703 251 3471 sfrishman@deloitte.com	<b>Andy Gold</b> Tax Partner +1 713 982 3598 agold@deloitte.com	<b>Ann Kamasky</b> Tax Partner +1 703 251 3620 akamasky@deloitte.com
<b>Tax operating models</b>	<b>Brad Ford</b> Tax Principal +1 214 840 1029 braford@deloitte.com	<b>Amy Shanes</b> Tax Partner +1 704 227 1469 ashanes@deloitte.com	
<b>Federal and state tax controversy updates</b>	<b>Michael Bryan</b> Tax Managing Director +1 215 977 7564 mibryan@deloitte.com  <b>Rosemary Sereti</b> Tax Managing Director +1 202 220 2118 rsereti@deloitte.com	<b>Scott Frishman</b> Tax Principal +1 703 251 3471 sfrishman@deloitte.com	<b>John Keenan</b> Tax Managing Director +1 202 879 5605 jkeenan@deloitte.com
<b>Tax reform, recent transfer pricing cases, country-by-country reporting, and impact on IP planning</b>	<b>Viet Dinh</b> Tax Principal +1 202 220 2648 vdinh@deloitte.com	<b>Aydin Hayri</b> Tax Principal +1 202 879 5328 ahayri@deloitte.com	<b>Arindam Mitra</b> Tax Principal +1 202 879 5670 amitra@deloitte.com
<b>New technology has made its way to the tax department: What you should know</b>	<b>Craig Darrah</b> Tax Managing Director +1 312 486 1745 cdarrah@deloitte.com	<b>Mikel Hoover</b> Tax Principal +1 704 227 1452 mhoover@deloitte.com	<b>Maheshwar Marepalli</b> Tax Managing Director +1 571 766 7557 mmarepalli@deloitte.com

# Deloitte TechGarden Demos in the International Foyer



---

## State NOL Insight

State NOL Insight is an intuitive, innovative, web-based solution that captures a taxpayer's state NOL-related data. This solution uses robust data analytics and visualization functionality to assist with tax planning, compliance, and provision calculations.

---

## Business Travel Analytics

Deloitte's Business Travel Analytics solution enables companies to manage their business travelers and mitigate compliance risk. Leveraging 'big data', this solution provides dynamic reports that illustrate employee travel patterns and flags the jurisdictions in which employees have triggered potential tax filing and immigration requirements. Organizations are able to make proactive staffing decisions to manage issues such as payroll reporting and withholding, permanent establishment, social security, VAT reclamation, and travel costs.

---

## TP Digital DoX

Deloitte TP Digital DoX is a web-based solution to facilitate and streamline the efficient preparation of TP documentation reports, while allowing for close collaboration between and among Deloitte and project teams.

---

## TradeChain

TradeChain is a blockchain-based transfer pricing system that enables consensus on the state of intercompany agreements, facilitates consistency in the generation of new intercompany agreements, and automatically inspires accurate intercompany transactions. This system will decrease complexity in the transfer pricing process and increase transparency between intercompany affiliates.

---

## Data Management Solutions—Tax Portal

Tax Portal is a framework environment that uses document management, workflows, calendars, and data collection forms to provide companies a process-based technology solution to enable globally consistent tax processes for areas such as VAT compliance, provision, direct tax compliance, tax controversy, transfer pricing, and planning.

---

## GlobalAdvantage

Deloitte delivers mobility rewards and compliance services through people, process, and technology. GlobalAdvantage underpins delivery of these services.

---

## Robotic Process Automation

Robotic Process automation (RPA) is delivered through software that can be configured to undertake rules-based, deterministic tasks. RPA can streamline, standardize, and optimize processes previously completed manually, yielding benefits such as improved quality, increased efficiency, and potential for high ROI.

---





# Notes

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---



# Deloitte.

## **About Deloitte**

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee (“DTTL”), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as “Deloitte Global”) does not provide services to clients. Please see [www.deloitte.com/about](http://www.deloitte.com/about) for a detailed description of DTTL and its member firms. Please see [www.deloitte.com/us/about](http://www.deloitte.com/us/about) for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting.  
Copyright © 2017 Deloitte Development LLC. All rights reserved.