



**LEADING WOMEN IN  
TAX FORUM**  
 MARCH 3, 2020  
 STEWART HOTEL 371 SEVENTH AVE , NEWYORK

GOLD SPONSORS



SILVER SPONSORS



BRONZE SPONSORS



ASSOCIATION PARTNERS





## OVERVIEW

ITR is delighted to return to NYC for our third annual Women in Tax Forum. This interactive one-day forum will cover US and global tax and transfer pricing developments and provide a platform for tax professionals and in-house tax practitioners to learn in a collaborative and supportive environment.

Our theme this year is: "Has US Tax Reform created the desired effect on international tax?" Tax professionals and practitioners are dealing with tax transparency and risk management on these pressing issues: foreign business operations of US companies, impact on corporate strategy of cross-border M&A, hard-to-value intangibles (e.g. IP), taxation of cryptocurrencies, and the impact of tax digitalization.

Over the past 10 years, more women have entered the professional field of taxation. Our forum offers women the chance to celebrate women in tax and learn from their real-life experiences on career progression, leadership, and work-life balance. We need more senior women leaders in tax (chief tax officers) since it is proven that gender-balanced leadership teams result in better business performance because they are less prone to tax evasion or accounting fraud and they assess risk differently when making strategic decisions.

We will be applying for CPE credits for New York State after the Forum concludes. You can earn up to 8 credits in Tax. Any questions, please contact Anne de Franca: [anne.defranca@euromoneyplc.com](mailto:anne.defranca@euromoneyplc.com)

## WHO YOU WILL MEET

Director Global Tax		Chief Tax Officer
	Tax Directors	
VP International Tax		Executive Director – International Tax & Strategy



## VENUE

Stewart Hotel  
371 Seventh Ave  
@31st Street  
New York , NY 10001

## BENEFITS OF ATTENDING

- Manage your organization's tax risk profile
- Discuss today's successes and challenges for women in tax in our workplaces
- Determine the best tax structuring for M&A
- Learn how to effectively build and manage an in-house tax department
- Understand the challenges in digital tax policy
- Build an international and trusted referral network of women in tax
- Cope with Transfer Pricing risk, governance & transparency
- Balance professional responsibilities with busy personal lives

“ The topics were a great balance between tax and soft issues. Loved how many in-house tax women attended! ”  
*Westpac Banking Corp attendee*

“ Very honest and insightful. Great to have in-house and law/tax firm perspectives. ”  
*MetLife attendee*

“ I'm leaving with great insights to use at work. ”  
*Goldman Sachs attendee*

## AGENDA

8:00 REGISTRATION AND CONTINENTAL BREAKFAST

8:40 OPENING REMARKS

Beth Ranney, senior conference producer, ITR

**8:45 Opening interview: Tax Morale: What drives businesses to pay tax?**

Anjana Haines, managing editor, *International Tax Review* (moderator)

Jane McCormick, global head of tax, KPMG

Grace Perez-Navarro, deputy director - Centre for Tax Policy and Administration, OECD

**9:05 Tax transparency and risk management**

- Tax under the spotlight; corporate reputation management
- Establishing positive external relations including tax authorities
- The trend towards greater exchange of information – what has the effect been?
- Managing your organization's risk profile

Kathleen Russ, senior partner, Travers Smith (moderator)

Jessie Coleman, tax office lead, IFC/World Bank

Soorashree Sadekar, associate director transfer pricing Americas, AIG

Emily Clark, tax partner, Travers Smith

**9:55 Transfer pricing concerns**

- Post-BEPS – is the arms-length principle working? What are the alternatives?
- Operational TP
- Understanding the FTTP
- Implementing corrections to transfer pricing policy
- Transfer pricing reporting and documentation - Country-by-Country Reporting (CbCR)

Elizabeth Stevens, member, Caplin & Drysdale (moderator)

Renata Ardous, international tax and transfer pricing director, Mazars

Sahar Gaya, global transfer pricing lead, Glencore

Margaretha Haeussler, director TP, Novartis

Christina Culver, associate, White & Case

10:55 NETWORKING COFFEE BREAK

**Room A**

**11:15 Impact of tax reform on M&A and restructurings**

- Impact of TCJA on deal structuring
- Valuing and paying for tax attributes
- Cross-border M&A
- Internal restructurings: driving factors and traps for the unwary

Laura Barzilai, partner, Sidley Austin (moderator)

Aditi Banerjee, VP and corporate counsel – tax, Prudential

Christine Griff, VP, tax counsel, PepsiCo

Tara Lancaster, counsel, Sidley Austin

**Room B**

**11:15 Use of dispute resolution to resolve large, complicated corporate tax disputes**

- Resolving Issues and Uncertainty Related to Tax Reform
- Resolving Double Taxation and Other International Issues: APAs, ICAP, Joint Audits, & the Role of Treaties

Elizabeth Smith, counsel, Ropes & Gray (moderator)

Tiur Henny Monica, chief legal officer, Blackspace

Caroline Ochital, head of tax, Siemens Healthineers

Kat Saunders Gregor, partner, Ropes & Gray

**12:05 Challenges for the taxation of the digital economy**

- OECD work on Pillar 1 and Pillar 2
- EU developments
- Unilateral measures-managing the conflicting rules effectively

Starling Marshall, partner, Crowell & Moring (moderator)

Linda Evans, director, global tax policy and government affairs, IBM

Ellen Kandel-Burg, executive director – corporate tax, JPMorgan Chase

Margriet Lukkien, tax partner, Loyens & Loeff

Grace Perez-Navarro, deputy director - Centre for Tax Policy and Administration, OECD

Daniella Zagari, partner, Machado Meyer Advogados

1:05 NETWORKING LUNCHEON

**1:55 Recent developments in international tax law and policy**

- Foreign Derived Intangible Income (FDII) and Global Intangible Low-Taxed Income (GILTI)
- US Foreign tax credit
- Base Erosion and Anti-Abuse Tax (BEAT)

Larissa B. Neumann, partner, tax, Fenwick & West (moderator)

Nancy Loube, VP Tax, Brunswick Corporation

Marnie Metsch, executive director, international tax counsel, ITT

Julia Ushakova-Stein, associate, tax, Fenwick & West

**2:45 Career development breakout sessions**

*Delegates will join all the following facilitated workshops, which will last for 30 minutes each. You will draw on advice and experiences from leading tax women and your peers to discuss:*

**Room A**

• **Culture and policies on unconscious bias**

Rebel Curd, VP, practice leader transfer pricing, Charles River Associates

Jessie Coleman, tax office lead, IFC/World Bank

**Room B**

• **Opportunities and promotions while managing work/life balance**

Melissa Hall, SVP – global head of tax, Assurant

Bernadette Pinamont, VP Tax Research, Vertex

3:45 NETWORKING COFFEE BREAK

**Room A**

**4:05 Practical considerations in managing today's challenging international tax disputes environment**

- Things to think about in developing a process to manage your global disputes
- New approaches used by the revenue authorities
- Growing importance of tax transparency and tax certainty
- LATAM alignment with OECD (eg. Brazil)

Sharon Katz-Pearlman, global head of tax dispute resolution & controversy, KPMG

Ana Luiza Martins, partner, Tauil & Chequer Advogados

Associado, a Mayer Brown association

Elizabeth Schwartz, VP tax planning, SONY

**Room B**

**4:05 State and local tax compliance and challenges**

- State implications of federal tax amendments to align with international provisions
- Practical state reporting issues associated with TCJA
- Non-Conformity Issues and Challenges to Conformity

Leah Robinson, state and local tax partner, Mayer Brown (moderator)

Michelle Klotzbach, AVP, tax counsel, MetLife

Anna Soubbotina, Principal, Charles River Associates

**4:55 Managing the in-house tax department**

- Managing increased workloads with limited resources and using metrics to determine department value
- Collaborating with HR on recruiting, on-boarding, and retaining the “right” diverse staff
- Working effectively with law firms, outside consultants, technology vendors, and advisor

Maria Eberle, partner, Baker McKenzie (moderator)

Tanya Guazzo, global head of tax, S&P Global

Miriam Klein, managing director, tax, Centerbridge Partners

Paola Taddeo, global head of tax, Covanta

Lindsay LaCava, partner, Baker McKenzie

5:45 NETWORKING COCKTAIL RECEPTION

6:30 FORUM ADJOURNS



## BOOKING FORM

	Tax Executives	Advisers/Consultants/ Private Practitioners
Early bird rate (before December 20)	<input type="checkbox"/> FREE	\$795
Standard rate (after December 20)	<input type="checkbox"/> FREE	\$1095

### YOUR DETAILS FOR REGISTRATION (PLEASE PRINT)

**Delegate**

Name: \_\_\_\_\_

Job title: \_\_\_\_\_

Company: \_\_\_\_\_

Address: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Postcode: \_\_\_\_\_

Country: \_\_\_\_\_

Tel: \_\_\_\_\_

Email: \_\_\_\_\_

*Please photocopy this page if registering more than one delegate*

### METHOD OF PAYMENT

Please tick the appropriate box to choose your payment method and sign below:

- Bank transfer (details will be provided by invoice)
- Credit card payment (pay online at <https://events.internationaltaxreview.com/womenintax-NY> or call +44 (0) 20 7779 8938)

**REGISTRATION:** All registrations are subject to final review. Where the registration fee applies, the fee is charged in USD

**PAYMENT:** All registration fees (where applicable) must be received in full prior to the invoice due date or event date, whichever is sooner.

Please note that in completing this booking form you undertake to adhere to the cancellation and payment terms listed on this form.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Position: \_\_\_\_\_

### TO REGISTER

**Telephone**

+44 (0) 20 7779 8938

**Email**

registrations@itrsight.com

**Mail**

Kevin Pragas  
 Legal Media Group  
 8 Bouverie Street  
 London, EC4Y 8AX, UK

**CANCELLATION POLICY:**

By registering for an event, you are agreeing to the terms and conditions whereby you are liable for a cancellation fee or the full conference fee (and field trip, pre/post conference workshops).

**PAYING DELEGATES:**

All cancellations by Participants must be received in writing at least 6 weeks before the first day of the Event (January 21, 2020). We cannot accept verbal cancellations. If written cancellation is received in writing at least 6 weeks before the first day of the Event, we will refund Fees already paid (if any) less a 10% administration charge (or such other charge as shall be specified in the Content provided to Participants upon registration for the Event). If written cancellation is not received in writing at least 6 weeks before the first day of the Event, the Participant shall be liable for payment of the Fee in full, irrespective of any non-attendance at the Event (no refund shall be due on any Fees already paid and/or any unpaid Fee invoices shall remain due and payable in full).

If owing to a force majeure, International Tax Review is obliged to postpone or cancel the event. International Tax Review will not be liable for any travel or accommodation expenses incurred by delegates or their organisations. Badge swapping with other registered/non-registered delegates is against our company policy and will not be permitted.

**MARKETING PREFERENCES:**

I agree to receive exclusive news, content and offers from International Tax Review and other Euromoney group company products and services by:

- Email
- Telephone
- SMS
- Mail
- Third party (email only)

You can unsubscribe at any time by clicking the "unsubscribe" link at the bottom of any communications we send you. You can also visit our preference centre and Privacy Notice.

