



AGENDA*

Morning of Tuesday, July 28th

9:00-10:00am

Understanding the Tax Implications of the Legislative Response to the Pandemic

In an effort to support individuals and the economy during the pandemic the CARES Act makes several changes to the tax code. Panelists will discuss these changes and what they mean for foreign financial institutions.

T. Daris Isbell
(Moderator)

Head of US Tax Planning
TD Bank Group

[Kristen Garry](#)

Partner
Shearman & Sterling LLP

Jeffrey Levey

Executive Director
Washington Council Ernst & Young

[Kenneth Schulhof](#)

Tax Partner
Deloitte Tax LLP

10:10-11:10am

Efforts to Support the Economy During the Pandemic and Recovery and the Effect on Taxes

The response to the pandemic by the Federal Reserve and central banks around the globe and the work of banks to keep credit flowing will likely come with tax implications. Experts will discuss the changes resulting from various programs, facilities and efforts and the potential tax effects.

Amanda Gabai
(Moderator)

Director, Tax Advisory Services, Americas
Deutsche Bank AG

[Douglas Elliot](#)

Partner and Vice Chairman, Financial Services Americas
Oliver Wyman

[Mark Leeds](#)

Partner
Mayer Brown LLP

11:20am-12:20pm

State Taxes and Working from Home

With nearly everyone working from home, and a good portion of people continuing to work from home for the near future, there are new state tax considerations around issues such as, nexus, apportionment, and conformity with federal relief. Panelists will discuss these considerations that foreign financial institutions may need to take into account.

Habibe Rubio
(Moderator)

Head of US Tax -- Tax Controller, Americas, Group Taxation
Westpac Group

Sarah McGahan

Director, State & Local Tax
KPMG LLP

[Alyse McLoughlin](#)

Partner
McDermott Will & Emery LLP

Alexis Morrison-Howe

Tax Principal
Deloitte Tax LLP

Morning of Wednesday, July 29th

9:00-10:00am

Regulatory Developments: Tax Cuts and Jobs Act and Other Changes to the Tax Code

Prior to the pandemic Treasury was busy implementing the many tax code changes required by the Tax Cut and Jobs Act, as well as other changes. This work continues, and panelists will discuss those changes and potential changes, along with compliance considerations.

Meredith Bettencourt
(Moderator)

Director, Tax Counsel
Royal Bank of Canada

[Jeffrey Hochberg](#)

Partner
Sullivan & Cromwell LLP

Danny Simon

Partner
PwC

[Diana Wollman](#)

Partner
Cleary Gottlieb Steen & Hamilton LLP

10:10-11:10am

The Changing Landscape of Transfer Pricing, Including the Potential Effects of the Pandemic

The world of transfer pricing was only getting more complex prior to the pandemic and the pandemic has only contributed to this complexity. Experts will discuss what to look out for.

Sonia Inamdar
(Moderator)

Director, Barclays Tax Americas
Barclays

Laurent Bellay

Principal, Transfer Pricing and Value Chain Transformation
PwC

David Farhat

Principal, Financial Services - Transfer Pricing
Ernst & Young LLP

[Barbara Mace](#)

Principal Economist
DLA Piper

11:20am-12:20pm

Audit Controversies: The Effect of the Pandemic on Audits

The pandemic has not stopped audits; however, it has changed how audits occur and may result in changes to future audits and additional IRS campaigns. Panelists will discuss what they are currently seeing, how to address some of the unique circumstances, and the potential focus of future audits.

Betty Du
(Moderator)

Managing Director
UniCredit Bank AG, NY Branch

[Terence Coppinger](#)

Partner
Mazars USA LLP

[Armando Gomez](#)

Partner
Skadden, Arps, Slate, Meagher & Flom LLP

[Sharon Katz-Pearlman](#)

National Principal-in-Charge, Tax Dispute Resolution
KPMG LLP

*Subject to change