



Corporate Actions Tax Seminar

This annual event will feature industry leaders discussing the latest regulatory requirements and challenges in the tax compliance and corporate action space. Participate in-person or via webinar.

Friday September 14, 2018

8:00am – 12:30pm

Registration Desk Hours

8:00am – 9:00am

Networking Breakfast

Sponsored by Scivantage

9:00am – 9:05am

Welcome Remarks

Speaker



Jamila Alkaifi-Hercules

Group Manager and Vice President
BNY Mellon

9:00am – 12:30pm

General Session Audio Visual

Sponsored by Broadridge Financial Solutions, Inc.

9:05am – 9:10am

President's Opening Remarks

Speaker



Carly Byrd
Director, Global Tax Utility
Deutsche Bank AG

9:10am – 9:40am

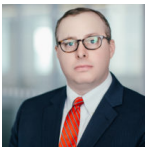
International Tax Challenges

Moderator



Siobhan Bolger
Bank of America Merrill Lynch

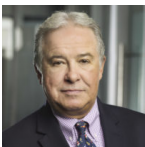
Panelists



Gregory Lewis
Director, Depository, CSD & Issuer Services
GlobeTax



Andrew McNaughtan
Vice President, International Tax Operations
Morgan Stanley

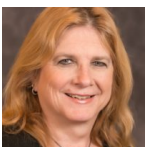


William J. Salva
Vice President, DR Tax Services
Goal Group of Companies

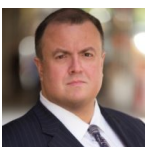
9:40am – 10:20am

871(m), 305(c) Regulatory Update & Operational Challenges

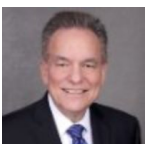
Panelists



Stevie D. Conlon
Vice President, Tax & Regulatory Counsel
Wolters Kluwer Financial Services



Julio M. Jimenez, Esq.
Owner
Jimenez Tax Law Firm, PLLC



Marty Rosen
Director - Customer Information Reporting Department
ICBC Financial Services

10:20am – 10:40am

Artificial Intelligence

Speaker



Neil Bromberg

Principal, Tax Technology and Transformation

EY

10:40am – 11:00am

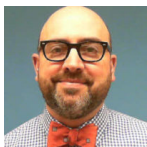
Networking Break

Sponsored by GlobeTax

11:00am – 11:20am

Embedded Loan & Liquidating Trusts

Panelists



Fred Ceraso

Vice President, Tax Operations

Goldman, Sachs & Co.



Jonathan Jackel

Executive Director, Financial Services Organization

EY



Justin O'Brien

Principal

EY

11:20am – 11:40am

The Next Phase – FATCA / CRS

Speaker



Jon Lakritz

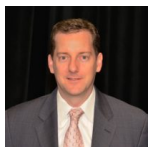
Managing Director

PwC

11:40am – 11:55am

DTCC Update

Speaker



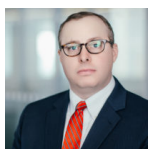
Ian DeSacia

Director, Asset Services Product Management
DTCC

11:55am – 12:10pm

Globe Tax Update

Speaker



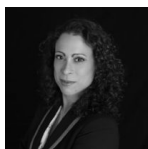
Gregory Lewis

Director, Depository, CSD & Issuer Services
GlobeTax

12:10pm – 12:25pm

IRPAC Update

Speaker



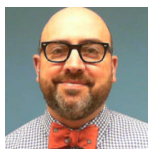
Dana Flynn

Director, Corporate Tax Department
BNP Paribas

12:25pm – 12:30pm

Closing Remarks

Speaker



Fred Ceraso

Vice President, Tax Operations
Goldman, Sachs & Co.