



Corporate Actions Section
SIFMA OPERATIONS & TECHNOLOGY SOCIETY

CAS Tax Seminar 2017



Friday, September 15 • 8:00am – 1:00pm • SIFMA Conference Center, NYC

PROGRAM

Friday
September 15, 2017

8:00AM – 12:20PM		
	Registration Hours	
8:00AM – 9:00AM		
	Networking Breakfast	
9:00AM – 9:05AM		
+	Welcome Remarks	PARTICIPANTS Jamila Alkaifi-Hercules
9:05AM – 9:10AM		
+	President’s Opening Remarks	PARTICIPANTS Lawrence Conover
9:10AM – 9:40AM		
+	Constructive Receipt Panel	PARTICIPANTS Carly Byrd, Stephanie Harmon, Katie Sevcik, Christopher Thiebaut
9:40AM – 10:30AM		
+	871m & 305c – Current State and 2018 Compliance	PARTICIPANTS Michael Goering, Stevie D. Conlon, Justin Hopkins, Ellis Levy

10:30AM – 10:50AM		
+	Networking Break Sponsored by GlobeTax	
10:50AM – 11:10AM		
+	FATCA & CRS – What's New and Ahead?	PARTICIPANTS Jon Lakritz
11:10AM – 11:35AM		
+	DTCC Update	PARTICIPANTS Ian DeSacia
11:35AM – 11:40AM		
+	Goal Group Update	PARTICIPANTS William J. Salva
11:40AM – 12:00PM		
+	GlobeTax Update	PARTICIPANTS Greggory Lewis
12:00PM – 12:15PM		
+	IRPAC Updates	PARTICIPANTS Robert C. Limerick
12:15PM – 12:20PM		
+	Closing Remarks	PARTICIPANTS Jamila Alkaifi-Hercules