



40th Annual TEI-SJSU
High Tech Tax Institute

Connect. Engage. Innovate. November 5, 2024

William	Barrett	1999 - 2000
Kristen	Bauer	2022-2023
Donald	Blach	2014-2015
John	Brennan	1995-1996
Peter	Campagna	1998-1999
Murray	Dean	2012-2013
Katrina	Doerfler	2003-2004
Stephen	Dunphy	2020-2021
Cindy	Duquette	2019-2020
Richard	Eigenbrode	2010-2011
Les	Ezrati	1988-1989
Mark	Freeman	2002-2003
Dave	Gaul	2007-2008
Sandra	Hahn	2008-2009
Karen	Harrison	1997-1998
Clifford	Jernigan	1983-1984

Eileen	Landauer	1996-1997
Larry	Langdon	1984-1985
Deborah	Lange	2000-2001
Lisa	Lindberg	1987-1988
Lorraine	McIntire	2011-2012
Thomas	Meredith	1987-1987
Paul	Morgan	2005-2006
Rebecca	Muenchen	1990-1991
Don	Rath	2009-2010
Judy	Rodgers	1993-1994
Thomas	Rogers	2004-2005
Ray	Rossi	1994-1995
Eric	Ryan	1989-1990
Fenella	Salomonsson	2024-2025
Ricardo	Samaniego	2017-2018
Howard	Schneck	2023-2024

Donald	Scott	2009-2010
David	Seltzer	2001-2002
Daniel	Smith	2021-2022
Chris	Therrien	2018-2019
Michael	Wallace	1992-1993
Peter	Waterstreet	2013-2014
Neil	Young	2015-2016



We revived the 3-day TEI Tax School, and instead of binders we gave participants a blue attache style bag with the TEI logo. I wonder if anyone still has one?

Peter Campagna, 1998-1999 Chapter President

COVID pandemic

Steven Dunphy, 2020-2021 Chapter President

The end of the pandemic; people getting vaccinated (some starting to go back to workplaces), and we were all starting to brainstorm on how we were going to be able to meet together in person again.

Daniel Smith, 2021-2022 Chapter President

Litigation on stock-based compensation and the research tax credit.



Attending the Annual Meeting of Members. Bringing together our younger in-house professionals and helping them realize their goals/path to success, i.e. future leaders of TEI.

Fenella Salomonsson, 2024-2025 Chapter President

Changing TEI Chapter name from Santa Clara to TEI Silicon Valley Chapter. Strengthening relationship with TEI National for soft skill training as part TEI National Tax Management Committee on developing future tax leaders. The countless trips to TEI DC with family to see friends, staffers, Congressional folks, advisors and seeing my brother who is a FEMA Director in DC.

Ricardo Samaniego, 2017-2018 Chapter President

Establishing the annual TEI Silicon Valley Chapter Scholarship Award to support SJSU MST students. Hiring Lisa Nesbit, our amazing events coordinator.

Howard Schneck, 2023-2024 Chapter President



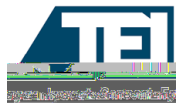
It's not about being right or wrong, it's the process of exploration, creativity, and understanding. Tax policies, process, and administration can be a valuable tool for the enterprise to achieve the "best" possible outcome in the least disruptive manner.


j Lorraine McIntire , 2011-



The TEI network can be an invaluable aid to the entire tax department, so make sure to use all the resources available. Of course, the TEI local, regional, and national conferences are key. But also TEI offers a national platform to comment on legislation, Regulations, and other initiatives, if the tax department gets involved.

Eric Ryan, 1989-1990 Chapter President





Tax Department: Responsibilities



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Types of taxes: income, VAT, customs, sales & use, payroll
Economic, Social, Governance responsibility going forward?
Communicating with the C-suite and the general public

C-Suite

- Communication issues and best practices

- Future of tax department in relation to C-suite – is it a partner with the business?
Is it merely support?

- Impact of Pillar Two in communications


Managing increased public tax disclosures

- Public country-by-country reporting

- More and more financial accounting disclosures

- What does the future hold?





Establishing individual roles and responsibilities

Managing turnover

Hiring

Difficulties – lack of candidates


Future of accounting profession?

Remote/mobile employees

Managing tax issues

Is this permanent?

How can technology help?



How much vs. how little?

Managing the service provider relationship

What are the trends in this area?

How does technology help/hurt?



Software other than AI

Current use in the tax department – tax specific?

New and forthcoming tools?

Interaction with Financial Reporting system

Future state – what would help?

AI

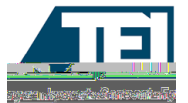
How does this function?

Current and future use cases in the tax department

Will we be replaced?



Q&A?





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Ben Shreck: bshreck@tei.org

