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March 31
& Save!

The 10th Annual Reengineering Tax Summit

Discover How to Maximize the Efficiency of Your Tax Department
While Maintaining Compliance with Changing Regulations

May 19-20, 2004 • Hotel Monaco • Chicago, Illinois

Hear case studies and learn best practices from our distinguished faculty, including:

- Allete
- Alticor Inc.
- Baker & McKenzie
- BellSouth Corporation
- Bordeaux Capital
- Deloitte & Touche, LLP
- Dow Corning Corporation
- Ernst & Young
- Grant Thornton LLP
- Hudson United Bank
- Information Requirements Clearinghouse
- Jefferson Wells International
- Kirkland & Ellis LLP
- NERA Economic Consulting
- Outsourcing Solutions Group
- PricewaterhouseCoopers LLC
- Providian Financial Corporation
- SherwoodLaw New York
- Taxware
- U.S. Securities & Exchange Commission
- WPP Group
- Yetter Consulting Services, Inc.

Join leading experts in discussing cutting-edge theories and strategies to answer your concerns on compliance and revenue generation, including topics on:

- Evaluating and improving internal controls to align your tax department with Sarbanes-Oxley compliance
- Streamlining operations by outsourcing tax functions while preventing potential pitfalls
- Recruiting, structuring and motivating exceptional tax staff
- Evaluating and utilizing the best operating systems available for tax automation and data warehousing
- Aligning state and local tax planning with business value drivers
- Developing an efficient records retention system so your past does not come back to haunt you
- Improving your tax department to add value and minimize exposure
- Preparing a successful transfer pricing documentation strategy

PLUS TWO IN-DEPTH WORKSHOPS YOU CANNOT AFFORD TO MISS!

**Sarbanes-Oxley: An In-Depth Look at Meeting
Tax Department Compliance Standards**

&

Avoiding Pitfalls When Outsourcing Tax Functions

Presented by:



CPE Credits Available!

TO REGISTER, CALL 1-800-647-7600 or 1-781-939-2438
Fax: 781-939-2490 or 781-939-2495 • e-mail: info@worldrg.com • www.worldrg.com

Dear Tax Professional:

The necessity to meet compliance on federal, state, and local levels, along with the pressures from shareholders and auditors, has pushed corporate tax departments into updating their practices. By reevaluating tax department organization and implementing more effective operational systems, corporations can begin to see the tax process more as a **savings opportunity and less as a liability**.

The 10th Annual Reengineering Tax Summit, distinguished speaker faculty made up of leading tax experts, will present insight into the continually changing domain of corporate taxation. By attending, will you learn successful solutions to reorganize your corporate tax department, including outsourcing tax functions to get the job done; using the best technology available; and strategies for retaining large amounts of tax records.

Our all-star roster of tax practitioners will address the latest strategies and emerging issues, including:

- Managing the additional burden of **Sarbanes-Oxley compliance**
- Creating **opportunities through outsourcing** while avoiding potential problems
- **Selecting tax automation and data warehousing systems** to achieve accuracy of tax data
- Enhancing the audit function through **transfer pricing**
- **Developing and retaining** an efficient corporate tax team
- Leveraging long-term property tax to **maximize savings**
- **Changing documentation processes** to retain necessary records
- Recognizing and understanding **income tax issues associated with FAS 109**

Take advantage of this unique opportunity to network with your peers from a variety of backgrounds and experiences. **By attending WRG's 10th Annual Reengineering Tax Summit, you will return to your office with proven strategies and implementation techniques to successfully improve your everyday tax operations.**

Register today! Simply call 1-800-647-7600 to reserve your space. I look forward to meeting you in Chicago on May 19!

Sincerely,

Nathan Dail

Nathan Dail
Conference Director
World Research Group (WRG)

***P.S. Register by March 31 and save \$200
off the regular conference price!***

ENHANCE THE BENEFITS OF THE CONFERENCE BY ATTENDING OUR PRE-CONFERENCE WORKSHOPS
Sarbanes-Oxley: An In-Depth Look at Meeting Tax Department Compliance Standards

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Avoiding Pitfalls When Outsourcing Tax Functions

WRG would like to thank the following companies for supporting 10 years of Reengineering Tax Programs:

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TO REGISTER, PLEASE CALL 1-800-647-7600

Master Strategies to Maximize the

PRECONFERENCE WORKSHOPS • WEDNESDAY, MAY 19
7:00 Workshop Registration & Continental Breakfast

7:30 Sarbanes-Oxley: An In-Depth Look at Meeting Tax Department Compliance Standards

- Coping with the additional focus of compliance
- Understanding the meaning of the new financial reporting requirements for tax departments
- Using the regulations to effectively prepare a filing
- Defining auditing procedures on tax accounts
- Implementing advance reporting methods to ease the burden
- Evaluating and improving internal controls, including MD&A
- Will new regulations add value to corporations?

Gary Paice
Partner
ERNST & YOUNG

10:15 Avoiding Pitfalls When Outsourcing Tax Functions

- Outsourcing pricing models and other pricing considerations
- Preventing disasters while creating new opportunities
- Structuring an outsourcing relationship to leverage mutual benefits
- Streamlining the Request for Proposal (RFP) Process
- Negotiating clauses in contracts when implementing a third-party relationship
- Administering risk management and insurance coverage for a third-party application
- Protecting customer privacy and confidential information
- Avoiding disputes and costly surprises
- Handling penalties on tax returns prepared by outside preparers
- Deciding when and how to renegotiate the deal

Lisa Pollina
BORDEAUX CAPITAL

Neil Hirshman, Partner
KIRKLAND & ELLIS LLP

Susan Lau, Senior Vice President and Associate General Counsel
PROVIDIAN FINANCIAL CORPORATION

DAY ONE • THURSDAY, MAY 19

12:45 *Main Conference Registration*

1:15 *Chairperson's Welcome and Opening Remarks*

1:30 Applying Sarbanes-Oxley Requirements to Corporations

- Overview of the regulations and recent implementation guidelines
- Current concerns for certification requirements
- Changing role of the audit committee in regards to tax services
- Dealing with the pressure to provide tax information with a shorter turnaround time than ever before

Martin F. Healy, Senior Trial Counsel
U.S. SECURITIES & EXCHANGE COMMISSION
(invited)

2:15 Implementing Changes in Your Tax Department to Adhere to State and Local Regulations

- Adding value while minimizing exposure
- Aligning tax planning with business value drivers
- Aligning state tax planning with other tax planning
 - Periods & methods
 - Incongruencies between group reporting methods
 - R&E Credits, embedded costs, property taxes
- Dealing with add back legislation
- How to identify and report tax shelters
- Are corporate tax shelters a threat to state budgets?

Giles Sutton, Executive Director, State and Local Tax, National Tax Office
GRANT THORNTON LLP

3:00 *Networking Break*

3:15 Streamlining Tax Automation Practices

- Selecting and implementing a tax automation system
- Achieving accuracy and efficiency through automation
- Strategies for controlling costs with new technology
- Maximizing the value of your current financial system
- Maintaining an automated tax system

Diane L. Yetter
YETTER CONSULTING SERVICES, INC.

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Who Should Attend

Organizations:

Large and Small, Domestic and International Corporations

Titles:

Managers • Directors • VPs • Auditors • Internal Auditors Accountants • Specialists • Controllers • Treasurers • CFOs
Specialists • Analysts • Consultants • Counsel

Areas of Expertise:

Tax • Accounting • Corporate Finance • Corporate Tax • Tax Compliance • Local Tax • State Tax • Federal Tax
International Tax • Income Tax • Property Tax • Tax Systems • Tax Technology • Tax Planning • Tax Research • Tax Returns
Tax Administration • Transaction Tax • Financial Reporting • Financial Performance

Efficiency of Your Tax Department

4:00 Maximizing Techniques for Tax Data Warehousing

CASE STUDY

- How to design and create a tax data warehouse system
- Best practices for gathering necessary data
- Transforming data into useable information
- Continually maintaining your data warehouse

Dena Hall, Regional Manager

JEFFERSON WELLS INTERNATIONAL

4:45 Closing Remarks and Day One Adjournment

12:15 Luncheon

1:30 Recruiting and Retaining an Exceptional Tax Team

CASE STUDY

- Developing and managing a first-rate tax team
- Matching skill sets with the right positions
- Establishing the importance of knowing the business
- Establishing an Individual Development Program (IDP)

Herbert Minke III, Manager

ALLETE

DAY TWO • FRIDAY, MAY 20

8:30 Continental Breakfast

9:15 Practical Guidance for Records Retention

- Why is records retention so important today?
- Developing a records retention program
- Understanding retention periods for common business records
- Procedures for destroying records
- Applying record retention to electronic records

Donald S. Skupsky, President

INFORMATION REQUIREMENTS CLEARINGHOUSE

10:00 Outsourcing vs. Internal Staff: Which Is Appropriate for You?

CASE STUDY

- Accepting outsourcing as a strategic financial management process
- Cost and effort associated with due diligence for vendor investigation
- Training and motivating your internal tax staff
- Leveraging internal business relationships for better tax planning

Evan Hardenbergh, Senior Tax Counsel

ALTICOR INC.

Eric McKinley, Executive Director, Corporate Tax

BELLSOUTH CORPORATION

Debbie Donaldson, Partner

DELOITTE & TOUCHE LLP

10:45 Shared War Stories Networking Session

BY POPULAR DEMAND

Previous attendees have stated they want more networking time with their peers. In this interactive peer discussion, we will break into groups to learn daily concerns fellow delegates and speakers are facing, to be able to walk away with proven strategies.

11:30 Reengineering Your Tax Department After Mergers & Acquisitions

CASE STUDY

- Strategies for a successful transition
- Integrating the new "combined" departments
- Preserving the acquired company's tax history
- Solutions to manage the acquisition of companies that never had a formal tax department
- Planning for the transition period with outside advisors

Tom Neuman, Senior Vice President, Tax

WPP GROUP

2:15 Enhancing the Audit Function Through Transfer Pricing

- Preparing a transfer pricing documentation strategy
- Innovative technologies for transfer pricing processes
- Implementing and negotiating Advance Pricing Agreements (APAs)
- Keeping transfer pricing at arm's length

Gregg D. Lemein, Partner

BAKER & MCKENZIE

Michael Kapp, Director, Tax

DOW CORNING CORPORATION

Victor H. Miesel, Vice President and Director,

Transfer Pricing for Northeast Region

NERA ECONOMIC CONSULTING

Stanley G. Sherwood, JD, CPA, LLM, Managing Partner

SHERWOODLAW NEW YORK

3:15 Networking Break

3:30 Managing Property Tax for the Long-Term: Opportunities to Maximize Savings

- Ensuring maximum recurring savings through planning and negotiation
- Developing a program to effectively manage relations with property tax jurisdictions
- Utilizing the best tools available to leverage savings

Jeff Binkley, Director, Property Tax Services

DELOITTE & TOUCHE LLP

4:15 Creating a Standardized Approach to Income Tax with FAS 109

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- Understanding the asset and liability approach for financial accounting and reporting for income taxes
- Required disclosures and statement presentation
- Recognition and measurement of a deferred tax asset or liability
- Planning strategies involved with valuation allowance

Robert Finnegan, Senior Tax Manager

PRICEWATERHOUSECOOPERS LLC

5:00 Closing Remarks and Conference Adjournment

WHAT PAST ATTENDEES HAVE SAID ABOUT OUR PREVIOUS TAX SUMMITS:

"I think that this is one of the best conferences that I have ever attended in terms of the applicability of the information to my job. I look forward to returning to this conference."

-AVP, US TAX COMPLIANCE, Willis North America

"The format was highly interactive, promoting frank discussion of practical problems and offered effective suggestions from the speakers and the audience."

-Attorney, Compton & Associates

"I left the conference with practical ideas and solutions that I can start using the first day back at my office...Thanks!"

-Manager of Income Tax, Otter Tail Corporation

"The participants and speakers focused on very common goals, each with an insight into one or more pieces to the overall puzzle. It was clearly worth my time."

-Curtis Castillo, Guardian Industries Corp.

"Good, concrete strategies to increase the tax department's effectiveness..."

-Erica Robb, Dollar Tree Stores, Inc.

"An excellent course! Helped me to foresee how my department should and will work in the future."

-Stephen Day, TJ International

"Very enlightening! Helped me understand more of the reasons and benefits; why change is imperative."

-Aurora Mendoze, Dean Foods Co.

"Very relevant, well-prepared speakers."

-Dan Hackett, Operating Vice President, Federated Dept. Stores

"Very strong presentations and topics. I look forward to next year."

-Steve Sokher, Director of Internal Audit and Taxation, Saxton, Inc.

"Excellent speakers; excellent topics."

-Lisa Meyer, Senior Tax Analyst, The Iams Company

"A great conference. Fast paced and interesting. All sessions were of current value on evolving issues."

-Teresa Weber, Senior Federal Tax Analyst, Consolidated Stores Corp

Sponsorship & Exhibit Opportunities

Don't miss out on this opportunity to showcase your products and services to executives at the highest levels of corporate tax divisions. Your competitors will be networking and selling their services to this targeted group, shouldn't you?

BENEFITS OF SPONSORSHIP INCLUDE:

- Direct and personal access to potential clients at the event
- Extensive publicity through direct mail, space ads, Web pages, and more
- Provide a permanent reminder of your full range of products and/or services in the form of promotional materials contained in the delegates' folders

IF YOU ARE INTERESTED IN SPONSORING OR EXHIBITING:

Lunch • Cocktail Reception • Breakfast • Advertising in the delegate workbook

Please contact **Aron Barkan** at **646-742-9763 ext.35** or **aron@worldrg.com**.



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Presented by:



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May 19-20, 2004 • Hotel Monaco • Chicago, Illinois

Registration Information:

EARLY REGISTRATION (Before March 31):

Conference ONLY: \$1495
Conference and 1 workshop: \$1895
Conference and 2 workshops: \$2095

REGULAR REGISTRATION (After March 31):

Conference ONLY: \$1695
Conference and 1 workshop: \$2095
Conference and 2 workshops: \$2295

Fee includes continental breakfast, lunch, refreshments, and conference documentation. Please make checks payable to WRG Research, Inc.

TEAM DISCOUNT: Register 3 team members from the same organization at the same time and the 4th team member attends **FREE!** (Valid on full price registrations only.)

PAYMENT POLICY / SUBSTITUTIONS / CANCELLATIONS: Registration fees must be paid by May 5, 2004. Your registration may be transferred to a member of your organization up to 24 hours in advance of the conference. All cancellations received on or before May 5, 2004 will be subject to a \$195 administrative charge. We regret that no refund for cancellations will be made after this date. In case of conference cancellation, World Research Group's liability is limited to refund of the conference registration fee only. World Research Group reserves the right to alter this program without prior notice. All cancellations must be submitted in writing on or before 14 days prior to the conference date in order to receive a refund, minus cancellation fee.

DRESS: Business casual is recommended attire.

CONFERENCE VENUE:

Hotel Monaco
225 North Wabash
Chicago, IL 60601
Tel: 866-610-0081

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Don't miss out on this opportunity to showcase your products and services to executives at the highest levels of corporate tax divisions. Your competitors will be networking and selling their services to this targeted group, shouldn't you? For more information on sponsoring a Lunch, Cocktail Reception, Breakfast, Welcome Pack or Badges, please contact **Aron Barkan at 646-742-9763 ext. 35** or aron@worldrg.com.

DOCUMENTATION BINDERS AND CD-ROMS: If you are unable to attend the conference or you would like extra copies for your colleagues, you can order your conference documentation binder and/or CD-Rom today. Don't miss out on the valuable information presented by industry leaders exclusively at this event. The binder or CD-Rom is available for only \$350; \$450 for both. Add \$50 for international shipments. The binder includes overheads, articles and presentations. Simply fill out the order form and the binder and/or CD-Rom will be shipped to you 2 weeks after the conference occurs.



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Yes! Please register me for the 10TH ANNUAL REENGINEERING TAX SUMMIT

- Also register me for the Workshop
- I would like to take advantage of the early-bird discount by registering before March 31, 2004.
- I cannot attend. Please send me a Conference Documentation Binder. Please send me the CD-Rom. Please send me both.
- Please send me future information via e-mail

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5 Easy Ways to Register

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