



How Global Companies are Gaining Strategic Advantage by Applying Advanced Technology to Corporate Transaction Taxes

Join us for a free half-day seminar at the Citrus Club in Orlando!

Thursday, October 30, 2008

The Citrus Club, Orlando

8:30 am - 2:00 pm

This free informational seminar is ideally suited for finance, business, and IT executives responsible for corporate transaction taxes. It features guest speakers from:

- ▶ **ADP**, a leader in outsourced business solutions including sales and use tax automation, tax credits, and economic incentives;
- ▶ **DuCharme, McMillen & Associates (DMA)**, a best-in-class provider of corporate tax solutions;
- ▶ **Pitney Bowes Group 1 Software**, a company providing the data, documents, and decisions that drive business;
- ▶ **Siemens**, a global powerhouse in electronics and electrical engineering, operating in the industry, energy and healthcare sectors.

Featured Speakers



Charles Collins

Vice President of Government Affairs, ADP

In this session, Charles will talk about the pressing challenges of tax compliance in today's environment. He will discuss how businesses can turn transaction tax calculation and compliance from a potential liability into a business advantage. Charles will look at some of the reasons why companies change their transaction tax systems - from dramatic growth and entrance into new markets to mergers and acquisitions or changes in their ERP systems. He'll talk about the opportunities that present themselves at that time:

- Consolidating multiple tax systems
- Utilizing certified tax systems and content
- Adding international capabilities
- Taking advantage of more modern technologies
- Reducing liability and minimizing audit risk

You'll leave this session with a much clearer understanding of how critical a role corporate transaction taxes play in the larger organization. Additionally, you'll be better prepared to build the case for a modern transaction tax solution to senior management.



Jonathan Kraft

Manager of Benchmarking Services

Eric Hanshew

Director Partner Relations and Strategic Development, DuCharme, McMillen & Associates (DMA)

Continued increase in the complexity of Sales and Use Tax regulations has placed significant demands on effective tax administration. Discussion will center on the findings from extensive Sales and Use Tax benchmark studies and several
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Agenda

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| 8:30-9:00 | Breakfast |
| 9:00-9:40 | Charles Collins, ADP
"Addressing the Challenge of Tax Compliance" |
| 9:40-10:20 | Jonathan Kraft and Eric Hanshew, DuCharme, McMillen & Associates
"Identification and Adoption of Best Practices in the Sales and Use Tax Process" |
| 10:20-10:30 | Break |
| 10:30-11:10 | Bob Meador, Pitney Bowes Group 1 Software
"Getting it Right the First Time: Fine-Tuning a Transaction Tax System" |
| 11:10-11:40 | Bob Bortnick, ADP Tax Credit Services
"Sales & Use Tax Reverse Audits: Why Are They Essential?" |
| 11:40-12:15 | Sandra Buckinger-Blair, Siemens
"Sales and Use Tax Automation: Your Key to a Leaner, More Agile Business" |
| 12:15-12:30 | Q & A |
| 12:30-2:00 | Lunch, one-on-one time with the speakers and partners |

For More Information about ADP:

1-800 CALL ADP ext. 228 ◀ www.adp.com ◀ taxware_marketing@adp.com



CITRUS CLUB

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examples of how participants in the studies created positive change to improve their Sales and Use Tax process. Specifically, the session will cover performance attributes and best practices of "Best-in-Class" Corporate Tax Compliance Organizations; how these "Best-in-Class" organizations balance efficiency (cost and productivity) and effectiveness (quality and error rates); and the leverage, productivity, and potential cost savings that technology can provide to the Sales and Use Tax process.



Bob Meador

Director of GeoTAX Product Management, Pitney Bowes Group 1 Software

Many of today's transaction systems still rely on Zip Code or Zip Plus Four technology. While this may be fine for routing surface mail, it leaves a lot to be desired when it comes to correctly assigning tax jurisdictions. This session will focus on more modern, GPS-based technology that can add pinpoint accuracy to today's transaction tax systems. Attendees will learn how the application of this technology can improve accuracy by 10%, 20% or even 30% – accuracy that translates into appreciable savings in taxes.



Bob Bortnick

Director of Tax, Sales and Use Tax Services, ADP Tax Credit Services

Effective tax compliance is crucial in ensuring that applicable states' regulations are adhered to. A key element in ensuring optimal compliance is by having periodic sales and use tax reviews performed, either internally or by third parties. Such reviews may uncover tax erroneously remitted on purchases of goods and services that are exempt by law and/or reduce penalties and interest assessments on underpayments of tax in the event of an audit.



Sandra Buckinger-Blair

Tax Manager, Siemens Shared Services, Siemens

What happens when a company applies the right technology to sales and use tax administration? This session follows the implementation of an automated sales and use tax system at a large multinational manufacturing company. Hear a first-hand account of how Siemens implemented a transaction tax system and as a result was able to reduce headcount, lower costs, and minimize liability – while improving compliance and adding value to the company.

Seminar Venue

The Citrus Club is central Florida's premier private business club located in the heart of Orlando's prominent legal and business district. Founded in 1971, the Board of Governors invited a select group of business, professional and community leaders to membership. Since that time, the Citrus Club continues to offer the spirit of diversity and promote connections with other professionals from an expansive list of industries. The club offers stunning views of the Orlando area!

Directions

Citrus Club

1800 BB&T Bank Tower (Citrus Center)
255 South Orange Avenue
Orlando, Florida 32801
407-843-1080

The Citrus Club is located on the 18th floor of the BB&T Bank Building, at the corner of Orange Ave. and Jackson St. Parking is available in the Citrus Center parking garage, accessible off of Jackson St.

Heading East on I-4:

Exit at Amelia St. (83B), turn right. Turn right onto Orange Ave. and left onto Jackson St. The Citrus Center parking garage will be on the left.

Heading West on I-4:

Exit at Highway 50. Turn left onto Highway 50 and go under Interstate 4. Turn right onto Orange Ave., left onto Jackson St. The Citrus Center parking garage will be on the left.

Heading West on 408:

Exit at Rosalind St. Turn left onto South St., turn right onto Magnolia, turn left onto Jackson St. The Citrus Center parking garage will be on the right.

Heading East on 408:

Exit at Orange Ave., keep to the right circling around the lake. Turn right onto Rosalind Ave. Turn left onto Jackson St. The Citrus Center parking garage will be 1 ½ blocks on the right.

CPE Information

ADP is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417, www.nasba.org.

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