Event Agenda

42nd Annual TEI/SJSU High Tech Tax Institute

Monday, November 02, 2026

7:30 AM - 8:20 AM	**Registration & Refreshments**
8:20 AM - 8:30 AM	**Welcome** Speakers: Nikki Flom, Annette Nellen
8:30 AM - 10:15 AM	**International High Technology U.S. Tax Current Developments** Speakers: Kris Hatch, William Skinner
10:15 AM - 10:30 AM	**Break**
10:30 AM - 12:00 PM	**BREAKOUT A - Inside Side-by-Side** Speakers: Quyen Huynh, Rachel Kleinberg, Ethan Kroll, Noah Lewis, Wouter van den Goorbergh
10:30 AM - 12:00 PM	**BREAKOUT B - AI in the Tax Department: Considerations Beyond Immediate Results** Speakers: Chris Anderson, Maria Critelli, Caitlin R. Tharp, Mark Tucker
12:00 PM - 12:45 PM	**Lunch**
12:50 PM - 1:45 PM	**Keynote Presentation - DC Update** Speaker: Michael Desmond
1:55 PM - 3:25 PM	**OBBBA Update for Tech Companies** Speakers: David Murdock, Travis Riley, Julia Ushakova-Stein
3:25 PM - 3:40 PM	**Break**
3:40 PM - 5:10 PM	**BREAKOUT C - VAT, Digital Services, and Other Indirect Tax Matters** Speakers: Gus Rivera, James Robinson, Nick Rudder
3:40 PM - 5:10 PM	**BREAKOUT D - AI in the Compliance and Value Chain** Speakers: Graham Cheever, Anli Chen, Matthew Haag, Joseph L Tobin
5:10 PM - 7:00 PM	**High Tech Tax Institute Sponsored by RSM**

Tuesday, November 03, 2026

7:30 AM - 8:20 AM	**Registration and Coffee**
8:20 AM - 9:20 AM	**Accounting for Income Taxes** Speakers: John Hauser, Jared Huish, John Ruan
9:20 AM - 10:35 AM	**Stock-Based Compensation: Recharge Agreements, Transfer Pricing, and More** Speakers: Payal Gupta, Nghi Huynh, Cameron McKesson, Kristin Peters
10:35 AM - 10:50 AM	**Break**
10:50 AM - 11:50 AM	**M&A Tax & Technology** Speakers: Bryan Keith, Sarah-Jane Morin, Timothy Shapiro, Myra Sutanto Shen

11:50 AM - 12:30 PM	**Lunch**
12:30 PM - 1:25 PM	**Keynote Presentation - Tax Technology Trends** Speakers: Nikki Flom, Jd Itri, Amit Ringshia
1:30 PM - 2:45 PM	**BREAKOUT E - Tariffs Update** Speakers: Jodi Ader, Chad Bowar, Stephen Dunphy, Donald Hok
1:30 PM - 2:45 PM	**BREAKOUT F - Economic Substance** Speakers: Bryon Christensen, Brian W. Kittle, Rob Kovacev, Ben Shreck
2:45 PM - 3:00 PM	**Break**
3:00 PM - 4:30 PM	**Federal Controversy Post Organizational Changes** Speakers: David Borden, James Creech, Paul DiSangro, Emily Lam, Cameron McKesson, Peter Rock
4:30 PM - 5:30 PM	**Domestic and Multistate Tax Update** Speakers: William Gorrod, Annette Nellen, Christanna Springs