2024 SYNERGY for Corporate Professionals

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Content	Checkpoint Advisory Maps: Your Roadmap for Corporate Reorganization Success	In this session, we will focus on how Checkpoint Advisory Maps can be an invaluable asset for organizations contemplating corporate reorganizations or divisions. Participants will be guided on using Checkpoint Advisory Map tools to structure these complex processes more efficiently. The session aims to showcase how to leverage these tools to expedite transactions, ensure thorough due diligence, and mitigate risks associated with corporate restructuring.	Upon completion of this session, participants will be able to: •Navigate the Checkpoint Advisory Map tools to support corporate reorganization and division planning •Describe how staff can find how-to guidance by industry experts and clear processes to follow •Demonstrate how to use an advisory map to help self-insured business owners choose a retirement plan	Attendees will need to have their own laptop, Checkpoint Edge Username & Password if they choose to follow along.
Content	Checkpoint Edge Essentials: Building a Strong Foundation for New Users	During this session, we'll review how to navigate the Checkpoint Edge platform, perform a keyword search and filter results, find documents by citation and save your research. This session is tailored for new users who aim to establish a solid foundation for their research endeavors across various practice areas.	Upon completion of this session, participants will be able to: •Execute targeted keyword searches •Explain how to apply filters to refine search results •Retrieve documents quickly using citation templates •Save and organize research results for future reference •Explain how to stay current on new developments	
Content	Embracing AI: Opportunities and Challenges for Tax Professionals	In this session, you will learn about the integration and impact of artificial intelligence in the corporate tax domain. A group of experts, including Thomson Reuters' product leaders, technologists from Thomson Reuters Labs, and TRI personnel, will offer insights and share experiences on how AI is shaping tax functions today and what developments we can expect in the future.	Upon completion of this session, participants will be able to: •Identify current AI applications within corporate tax departments. •Discuss strategies for adopting AI technologies in tax workflows. •Recognize the importance of engaging staff in technological advancements. •Understand the potential security and ethical implications of AI in the corporate tax environment.	
Content	Ensure Disclosure Accuracy with Checkpoint: Reviewing Peer and Industry SEC Filings with Checkpoint	In this session, we will explore the complexities of staying current with the evolving standards and practices in the financial reporting landscape. Utilizing Checkpoint Edge, we will demonstrate how to effectively track upcoming changes and ensure accurate representation of your company's reporting journey. Attendees will gain insights into leveraging the latest SEC filings, alongside curated samples and expert commentary, to maintain compliance and best practices in reporting	Upon completion of this session, participants will be able to: •Navigate Checkpoint Edge to access the most recent financial disclosure requirements and SEC filings. •Apply expert commentary to interpret the implications of disclosure trends and updates in regulatory standards. •Develop strategies for integrating new disclosure requirements into your company's reporting processes. •Anticipate future changes in reporting standards and prepare your organization for a seamless transition to new practices	
Content	Generative AI-Enhanced Tax Research: Checkpoint Edge with CoCounsel	In this session, we will delve into the capabilities of Checkpoint Edge with CoCounsel to revolutionize your tax research processes. We'll demonstrate how the integration of AI can enhance the accuracy and speed of your research, allowing you to navigate the complex landscape of tax information with ease.	Upon completion of this session, participants will be able to: •Understand the features and benefits of using Checkpoint Edge with CoCounsel for tax research. •Describe how to validate AI generated answers with cited sources •Explore predictive search technology using Intuitive Search	
Content	Multinational Taxation in 2024: Adapting to the OECD Pillar Two Regime	In this session, we will delve into the intricacies of the OECD's Pillar Two regime, which aims to establish a global minimum corporate tax rate of 15%. This initiative targets multinational corporations with annual revenues exceeding €750 million and is set to take effect in 2024. We will dissect the framework's implications, its expected impact on international business, and how companies can prepare for the changes.	Upon completion of this session, participants will be able to: •Explain the key components of the OECD Pillar Two regime and its significance in the global tax landscape. •Identify which businesses will be affected by the new tax rules and the criteria for inclusion. •Evaluate the challenges and opportunities that the Pillar Two regime presents to multinational corporations and tax authorities •Demonstrate where to find answers and resources on Checkpoint, including practice aids, checklists and more	

2024 SYNERGY for Corporate Professionals

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Content	Optimizing Credits and Incentives: Identify and Take Advantage of New Incentives Using Checkpoint	In this session, we will concentrate on discovering new incentives and optimizing credits through the use of Checkpoint. Attendees will be introduced to the latest tax incentives and learn how to maximize credit opportunities within their organizations. The session will provide a practical overview of the tools and resources available in Checkpoint that can be utilized to identify and apply these financial benefits effectively	Upon completion of this session, participants will be able to: •Recognize new tax incentives and credits that are relevant to various industries and business scenarios. •Apply practical strategies to optimize the use of tax credits and incentives for their organization's benefit. •Integrate Checkpoint tools into their workflow to ensure they are capitalizing on all available financial opportunities. •Stay informed on continuous updates and changes to tax incentives and credits through Checkpoint.	
Content	Regulatory Updates: What's Hot On Checkpoint	In this session, we will tackle the latest hot topics in taxation and financial reporting, with a focus on how professionals can utilize Checkpoint Edge to stay informed and efficient. Attendees will learn how to quickly find the most recent updates and gain the skills to expedite their tax and financial reporting research queries. This will empower practitioners to remain agile and responsive to the dynamic nature of tax regulations and financial reporting requirements.	Upon completion of this session, participants will be able to: •Identify methods to find the most recent developments in Checkpoint. •Identify recent hot topics in taxation and financial reporting that are relevant to their practice. •Utilize Checkpoint Edge features to access the latest updates and guidance on these hot topics. •Streamline their research process to find answers to tax and financial reporting questions more efficiently. •Apply best practices for staying informed on changes in tax law and financial reporting standards. •Enhance their research methodology using Checkpoint Edge to support accurate and timely reporting.	
Corporate Risk	AI Revolution in Banking: Opportunities and Challenges	In this session, we will explore the role of generative artificial intelligence (AI) in the banking sector, an evolving development that is transforming the way financial services operate. You will learn about how generative AI is being	Understand the concept of generative AI and its applications in the banking industry.	Participants should have a working knowledge of AI concepts and the current technology landscape within the
Corporate Risk	AML and Sanctions Compliance: Steering Through Consent Orders	In this session, we will work with the intricacies of navigating Anti-Money Laundering (AML) regulations, sanctions, and Consent Orders in the financial sector. You will gain insights into how these regulatory mechanisms interplay to	Upon completion of this session, participants will be able to: Comprehend the AML regulatory landscape and the role of sanctions in financial oversight.	Participants should have a working knowledge of AML and sanctions regulations as they apply to the financial
Corporate Risk	Beyond KYC: Mastering KYB, Compliance and Supply Chain in the	In this session, we will examine the critical components of Know Your Business (KYB), compliance, sanctions, and supply chain management in the finance sector. We'll explore how financial institutions conduct due diligence on business	Understand the principles and processes involved in KYB due diligence and its importance in the financial sector.	Participants should have a working knowledge of the regulatory landscape affecting financial institutions, including
Corporate Risk	Combating Financial Fraud: Strategies for Identity, First-Party and Elder Fraud	In this session, we will confront the pressing issue of fraud within the financial industry, focusing on identity fraud, first-party fraud, and elder fraud. We'll dissect the tactics used by fraudsters, the vulnerabilities they exploit, and the devastating	Identify the different types of fraud prevalent in the financial industry, with a focus on identity fraud, first-party fraud, and elder fraud.	Participants should have a working knowledge of financial industry practices, including customer interaction, account
Corporate Risk	Empowering Data for Good: How Financial Institutions Leverage	In this session, we will explore how financial institutions are leveraging Thomson Reuters Managed Services to empower data for good. We'll look at the ways in which these services enable banks and other financial organizations to enhance	Understand the role of Thomson Reuters Managed Services in the financial industry and the suite of solutions they offer.	Participants should have a working knowledge of data management practices and the regulatory
Corporate Risk	Follow the Money: A Panel Discussion on Combatting Human Rights Crimes in the	In this session, we will confront the sobering and critical topic of human rights crimes and human trafficking, focusing on how the banking and financial industry can play a pivotal role in detection and prevention. Our panel will discuss the signs	Recognize the financial patterns and behaviors indicative of human rights abuses and human trafficking.	Participants should have a working knowledge of the financial industry's role in AML efforts, the basics of transaction
Corporate Risk	Fortifying Finance: Combating Cyber Threats and Ransomware in	In this session, we will tackle the critical issues of network security, cybersecurity, and the threat of ransomware within the financial industry. We'll discuss the importance of robust security measures to protect sensitive financial data and the	Understand the core concepts of network security and cybersecurity as they relate to the financial industry.	Participants should have a working knowledge of information technology and basic cybersecurity principles. An
Corporate Risk	Navigating the Future of Finance: Crypto, Blockchain and Digital Assets	In this session, we will delve into the rapidly evolving landscape of cryptocurrencies, blockchain technology, and digital assets within the financial industry. You'll discover how these technologies are not just disruptive forces but	Explain the underlying technology of blockchain and how it supports digital assets like cryptocurrencies.	Participants should have a working knowledge of the basic concepts of cryptocurrencies and blockchain
Corporate Risk	The Future of Compliance: Gen AI in SAR Filings and Financial Monitoring	In this session, we will discuss the innovative ways in which generative AI technologies can be integrated into the financial monitoring processes of banks and other financial institutions. We'll explore the potential of AI to transform	In this session, we will explore the application of Generative Artificial Intelligence (GenAI) in Suspicious Activity Report (SAR) investigations within the banking and financial industry. The lecture will cover the fundamentals of GenAI technology,	efine GenAI and its capabilities in the context of SAR investigations.

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Corporate Risk	The invisible Enemy: Addressing Insider Risk in the Finance Industry	In this session, we will delve into the critical realm of Insider Threats & Investigations within the banking and financial industry. The session is designed to provide an in-depth understanding of the complexities and challenges that	Identify the key characteristics of insider threats in the banking and financial sector.	Participants should have a working knowledge of banking and financial industry practices, as well as basic
Corporate Risk	The Road Ahead in Finance: Post-Presidential Election Compliance and	Looking ahead to the post-presidential election landscape of 2024, this session will provide a forward-thinking analysis of the potential impacts and changes we can anticipate in finance and compliance. We will discuss how shifts in political	Evaluate the potential implications of the 2024 presidential election on financial regulation and compliance.	Participants should have a working knowledge of the current regulatory environment, as well as an
Corporates Legal	2024 State of the Corporate Law Department and the Future of Professionals Reports	In this session, we will delve into the current state of corporate law departments in 2024 and forecast the evolving roles of legal professionals in the future. As the legal landscape continues to be shaped by technological advancements and changing business environments, we will discuss the emerging trends, challenges, and opportunities that legal professionals are likely to face. This session aims to equip you with insights and strategies to navigate and thrive in the dynamic world of corporate law.	Upon completion of this session, participants will be able to:Analyze the current trends influencing corporate legal departments in 2024; Evaluate the impact of technological advancements on the practice of law;Predict future developments in the legal profession and their potential effects on legal departments;Predict future developments in the legal profession and their potential effects on legal departments;Identify skills and competencies that will be valuable for legal professionals in the evolving corporate landscape; Formulate strategies for law departments to stay ahead in a competitive and rapidly changing environment.	
Corporates Legal	Advanced Accrual Reporting for Financial Insight	In this session, we will cover Advanced Accruals reporting within Legal Tracker, providing an in-depth look at how legal departments can manage and report on accruals effectively. We will examine the latest features that support accurate and timely accrual reporting and participants will learn about the tools and techniques to capture, analyze, and communicate accrual information.	Upon completion of this session, participants will be able to understand the importance of accruals reporting in legal financial management, navigate Legal Tracker's accrual reporting features and functionalities, and implement best practices for collecting and reporting on accrual data.	
Corporates Legal	Ask Us Anything!	In this session we will have experts from both Legal Tracker and HighQ. Come ready to ask us anything!	Upon completion of this session, participations will have met consultants and other clients, as well as had the opportunity to have their questions answered by experts.	
Corporates Legal	Best practices in Contract Lifecycle Management (CLM)	In this session, we will focus on the intricacies of Contract Lifecycle Management (CLM) and its evolution in the corporate legal sphere. We'll examine how CLM systems are becoming more sophisticated with the integration of AI, leading to streamlined processes and better risk management. You'll gain insight into the benefits of an effective CLM strategy, from contract creation to renewal, and how it can provide a competitive edge for your legal department.	Upon completion of this session, participants will be able to:Define the stages of the Contract Lifecycle Management process and the role of AI in each stage; Recognize the advantages of using AI-powered CLM systems for contract efficiency and compliance;Implement best practices in CLM to mitigate risk and enhance contractual outcomes; Integrate CLM solutions with other legal tech systems to create a cohesive technology ecosystem; Prepare for future developments in CLM and anticipate how they will affect corporate legal operations.	
Corporates Legal	Budgets Entwined: Harnessing Legal Tracker for Comprehensive Financial Management	In this session, we will take a close look at the budget features within Legal Tracker, focusing on how these features are interconnected to provide a comprehensive budget management system. We will discuss practical aspects of budget creation, monitoring, and reporting, and demonstrate how Legal Tracker can be used to maintain financial discipline within legal operations while allowing for flexibility and strategic financial planning.	Upon completion of this session, participants will be able to understand the full suite of budget features available in Legal Tracker and how they interrelate, set up and manage budgets effectively within Legal Tracker to maintain control over legal spending, integrate budget data with other Legal Tracker features for a holistic view of legal operations, employ best practices for communicating budgetary information to stakeholders using Legal Tracker's reporting capabilities.	
Corporates Legal	Building Skills for the Future - Exploring the future of professionals and the skills needed for AI driven work.	n this session, we will explore the evolving landscape of professional work in the age of artificial intelligence and the critical skills required to thrive in this new environment. Participants will learn about the future of work trends, the impact of AI on various professions, and the key competencies needed to adapt and excel in an AI-driven workplace. This session is perfect for professionals across industries who are looking to future-proof their careers and leverage AI to their advantage.		

2024 SYNERGY for Corporate Professionals

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Corporates Legal	CoCounsel Core	In this session, we will explore the core functionalities of CoCounsel, an advanced legal technology platform designed to support lawyers in various aspects of the legal profession. We'll look into how CoCounsel can be utilized to streamline processes, from research to litigation support, and how its core tools can be leveraged to improve the efficiency and effectiveness of legal practice. This deep dive into CoCounsel will give participants a clear understanding of the platform's capabilities and how to apply them in daily legal operations.	Upon completion of this session, participants will be able to identify the primary features of CoCounsel and how they support legal tasks, apply CoCounsel's research tools to quickly find relevant case law and statutes, and evaluate the impact of using CoCounsel on the overall productivity of their legal practice.	
Corporates Legal	CoCounsel's Path Forward: Development Roadmap	In this session, we will chart the course for the future development and enhancements of CoCounsel, the advanced legal technology platform. The roadmap will outline planned features, updates, and strategic goals intended to further support legal professionals in their work.	Upon completion of this session, participants will gain insight into upcoming innovations and how they can prepare to integrate these changes into their practices.	
Corporates Legal	Connect and Conquer: Leveraging Integrations for System Efficiency	In this session, we will delve into the fascinating world of connectors and integrations, exploring how they can streamline workflows and enhance system interoperability. We'll focus on practical applications and demonstrate how to harness the power of connectors to seamlessly link different software platforms and services.	Upon completion of this session, participants will be able to identify the key types of connectors and their use cases in system integration, understand the principles of API connectivity and how it facilitates integration, execute basic integration tasks using popular connectors in a safe, test environment, evaluate the benefits and limitations of various integration methods, and develop a strategic approach to choosing the right connectors for specific business needs.	
Corporates Legal	Efficiency by Design: Document Automation with HighQ	In this session, we will focus specifically on the document automation capabilities of HighQ, which can transform the way your organization handles document generation, review, and approval processes. You'll discover how to create, customize, and utilize document automation to save time, reduce errors, and increase productivity within your legal and business workflows.	Upon completion of this session, participants will be able to understand the fundamental principles and benefits of document automation in HighQ, create custom document templates that can be used across various types of legal and business documents, and implement document automation workflows that trigger based on specific criteria or events.	
Corporates Legal	HighQ & CLMs	In this session, we will explore the synergy between HighQ collaborative technology and Contract Lifecycle Management (CLM) systems. You'll learn how integrating HighQ with CLMs can optimize contract processes, from creation through execution, and how to utilize these platforms to foster better collaboration and efficiency within your organization.	Upon completion of this session, participants will be able to describe the core functionalities of HighQ and its role in enhancing collaborative work, and explain the stages of Contract Lifecycle Management and how HighQ interfaces with CLM systems.	
Corporates Legal	HighQ Uncovered: Exploring the Hidden Gems of Your Collaborative Platform	We'll go beyond the basics and look into tasks, subtasks, rules, workflows, and dashboards to reveal additional features that can significantly enhance your operational efficiency and decision-making capabilities. Join us to discover the full extent of what HighQ can do that you may not yet know.	Upon completion of this session, participants will know more about various features in HighQ that leverage the system to centralize and streamline information sharing, automate processes, and seamlessly connect users.	
Corporates Legal	How Gen Ai transforms a corporate legal department	In this session, we will explore the transformative impact of Generative AI on corporate legal departments. You will learn how advanced AI technologies are revolutionizing the ways in which legal work is conducted, enhancing efficiency, and altering the roles of legal professionals. This session will provide a comprehensive understanding of the capabilities of Generative AI and its practical applications in a corporate legal setting.	Upon completion of this session, participants will be able to: Identify the key functions of Generative AI in the context of a corporate legal department, Understand how Generative AI can optimize document review and contract analysis processes.Assess the implications of AI technology on legal research and due diligence, Discuss strategies for integrating Generative AI into existing legal workflows to improve productivity and decision-making.	

Section	Session Title	Session Description	Session Objectives	Prerequisites
Corporates Legal	HQ: Advanced Workflows (and everything that comes with them!)	In this session, we will dive deeper into HQ's advanced workflows and the full spectrum of features that accompany them. From custom automation rules to sophisticated integration options, we'll cover how to harness the full power of HQ's workflow capabilities. Whether you're looking to fine-tune your existing processes or build complex workflows from scratch, this session will provide you with the insights and tools necessary to enhance productivity and streamline your legal operations.	Upon completion of this session, participants will be able to construct and manage intricate workflows that cater to the specific demands of legal projects by leveraging HQ's advanced automation features.	
Corporates Legal	Legal Tracker & HighQ: Strategies & Roadmaps	In this session, we will discuss the roadmap for new Legal Tracker & HighQ features and functionality. We will explore strategies on how best to utilize the new features in your Legal Operations Department.	Upon completion of this session, participants will be able to outline a strategic roadmap for HighQ and Legal Tracker new releases within their organizations.	
Corporates Legal	Legal Tracker Advanced - Predictive Budgeting best practices	In this session, we will delve into advanced predictive budgeting techniques and best practices within the context of Legal Tracker. You will learn the methodologies and strategies behind predictive budgeting, and how it can be applied to anticipate and manage your legal department's financial planning more effectively. We'll also discuss the advantages of using predictive budgeting tools for a more proactive and data-driven approach to managing legal spend.	Upon completion of this session, participants will be able to define the key concepts and advantages of predictive budgeting within the context of legal spend management and explore the tools within Legal Tracker that support these initiatives.	
Corporates Legal	Legal Tracker Advanced - RFP & Rate Management	In this informative session, we will delve into the advanced features of Legal Tracker, specifically focusing on Request for Proposal (RFP) management and Rate Management best practices. You'll learn why these features are critical for optimizing your legal operations, controlling costs, and ensuring you get the best value from your external legal service providers. Our discussion will highlight the importance of leveraging Legal Tracker for efficient RFP processes and effective rate negotiations, providing you with actionable insights and strategies.	Upon completion of this session, participants will be able to understand the significance of RFP management in selecting external legal service providers, and leverage data and reporting features in Legal Tracker to assess the effectiveness of RFPs and rate agreements.	
Corporates Legal	Legal Tracker Advanced Spend Analytics powered by Westlaw	In this session, we will delve into the powerful Spend Analytics feature within Legal Tracker that is powered by Westlaw, a leading provider of legal research. We will discuss how leveraging these advanced analytics can provide deep insights into your legal spend, enabling data-driven decisions that can optimize your department's financial performance. Attendees will learn to use these tools to uncover trends, identify cost-saving opportunities, and benchmark against industry standards.	Upon completion of this session, participants will be able to navigate the Spend Analytics feature of Legal Tracker and understand its integration with Westlaw, identify opportunities for cost savings and more efficient legal spend allocation, and understand how to use analytics to communicate value and performance to stakeholders.	
Corporates Legal	Matter Management Mastery with HighQ & Legal Tracker	In this session, we will address how to manage your legal matters effectively using HighQ and Legal Tracker. This will include an in-depth look at the matter management capabilities of both platforms, the synergy between them, and how they can be leveraged to streamline case handling, improve communication, and track key legal metrics. We will highlight best practices for matter organization, collaborative working, and data-driven decision-making.	Upon completion of this session, participants will be able to navigate the matter management features of HighQ and Legal Tracker with confidence, establish workflows that enhance team productivity and interdepartmental coordination, and learn how to integrate HighQ's collaborative tools with Legal Tracker's tracking systems to optimize case management.	
Corporates Legal	Next Gen iSheets	In this session, we will focus on the next generation of iSheets in HighQ, examining the advanced features and functionalities that have been introduced. We'll discuss how these enhancements can improve data capture, analysis, and reporting within your legal operations. The session will also provide practical demonstrations on creating and managing iSheets, as well as tips on utilizing them to for our most popular use cases.	Upon completion of this session, participants will be able to navigate the new interface and understand the upgraded features of next gen iSheets in HighQ, design and implement iSheets to streamline data collection and management processes, employ new functions of iSheets for sophisticated data analysis and visualization, and leverage iSheets to enhance collaboration and information sharing across teams and with clients.	

Section	Session Title	Session Description	Session Objectives	Prerequisites
Corporates Legal	Reporting – SAVINGS ONLY	In this session, we will examine the reporting capabilities of Legal Tracker with a focus on identifying and reporting on savings. We will explore how to effectively use Legal Tracker's reporting tools to track cost reductions, negotiate better rates, and demonstrate the value that the legal department brings to the organization.	Upon completion of this session, participants will be able to navigate the reporting features of Legal Tracker to monitor and report on savings, and communicate the impact of savings to key stakeholders and the wider organization.	

Section	Session Title	Session Description	Session Objectives	Prerequisites
Corporates Legal	Streamlining Legal Drafting with CoCounsel: The Future of Legal Tech	In this upcoming session, we will explore the capabilities of CoCounsel in the context of legal document drafting. CoCounsel, a cutting-edge legal technology solution, is designed to assist legal professionals with the drafting process by providing intelligent suggestions, automating routine tasks, and ensuring compliance with legal standards. We will dive into how CoCounsel can enhance your drafting efficiency and accuracy, and how it integrates with existing legal workflows to support lawyers and legal teams.	Upon completion of this session, participants will be able to understand the role of CoCounsel in the legal document drafting process, and understand to to utilize, leverage, and integrate CoCounsel into current legal workflows to maximize efficiency and collaboration.	
Corporates Legal	Synergy in Law: Navigating Corporate Legal Collaborations and Strategies	In this panel session, we will discuss the dynamics of collaboration between corporate legal departments and external law firms, as well as strategies for enhancing internal teamwork among legal colleagues. Our panel of experts will share insights on best practices for managing legal projects, fostering effective communication, and leveraging technology to streamline processes. We will explore the challenges and opportunities that arise when corporate legal teams collaborate with various stakeholders, both within and outside the organization.	Upon completion of this session, participants will be able to identify key factors that contribute to successful collaboration between corporate legal teams and external law firms, recognize and mitigate common challenges faced in legal corporate collaborations, and Share and adopt best practices from industry experts and peers to enhance collaborative efforts.	
Direct Tax	KPMG: Tax Provisioning in the AI Age: The Unseen Power of Co-Pilot and Gen AI	Get brief introduction to Gen AI, understanding its potential applications and how it can transform the way we interact with and utilize data from systems like OneSource. Discover how Gen AI and Co-Pilot can be utilized to generate meaningful insights from data extracted from OneSource, revolutionizing the approach to tax provisioning Learn how to leverage the capabilities of Gen AI and Co-Pilot to pre-build prompts, enhancing efficiency and streamlining the decision-making process in tax management.	Upon completion of this session, participants will be able; Recognize the transformative potential of Gen AI and Co-Pilot in the context of tax provisioning and how they can be used to interpret and apply data extracted from OneSource for meaningful insights. Determine how to effectively utilize Gen AI and Co-Pilot to pre-build prompts, enhancing the efficiency and accuracy of tax management processes. Apply knowledge of Gen AI and Co-Pilot to improve decision-making processes in tax provisioning using data from OneSource	
Direct Tax	"Maximizing the Value of Your Data: How Data Hub and DataFlow Can Help You Get More Out of Your Data"	how to get the most value out of your data, and how Data Hub and DataFlow can help organizations to extract insights and drive business outcomes from their data.	Articulate how ONESOURCE data access tools can speed up business processes. Assess the impact of ONESOURCE tools on the quality and depth of business analytics. Implement ONESOURCE data access tools to enhance data collection, processing, and reporting. Integrate ONESOURCE tools with existing ERP and tax systems for a cohesive data strategy.	Participants should have a working knowledge of data management systems, basic analytics, and an interest in optimizing business processes through technology.
Direct Tax	"The Essentials of Statutory Reporting in Direct Taxation"	This session is tailored to empower tax professionals with the knowledge to navigate the complexities of statutory reporting requirements in a global context. We'll explore the processes and systems that support accurate statutory reporting and discuss the role of technology in facilitating compliance and enhancing the quality of tax filings.	Identify the critical components of statutory reports. Implement best practices in the preparation, review, and submission of statutory tax reports. Utilize technology and software solutions to streamline statutory reporting processes. Analyze the implications of non-compliance and how to mitigate associated risks.	Participants should have a working knowledge of direct tax compliance and an understanding of the regulatory environment affecting statutory reporting obligations.
Direct Tax	Advanced Reporting and Administration for ONESOURCE Tax Provision	This session will cover advanced reporting capabilities in ONESOURCE Tax Provision v2026 including Batch Reporting functionalities, 10K reporting, various reporting configuration options, reporting permissions, and more.	Upon completion of this session, participants will be able to: Understand the advanced reporting elements in ONESOURCE Tax Provision v2016.	Attendees should have at least two or more years of experience with the ONESOURCE Tax Provision application

Section	Session Title	Session Description	Session Objectives	Prerequisites
Direct Tax	Advanced Topics for Return Preparation Using ONESOURCE Income Tax International	Beyond the basics, this session will delve deeper into processing returns in ONESOURCE Income Tax International and provide best practices and tips.	Upon completion of this session, participants will be able to: Recognize best practices for form processing using the ONESOURCE Income Tax International module.	Participants should have a working knowledge of ONESOURCE Income Tax International and a basic understanding of international tax concepts to gain the most from this session.
Direct Tax	BDO: Navigating the Future of Tax: Unveiling the Power of Tax AI Assistants	Exploring the convergence of technology and tax, this session delves into how Artificial Intelligence (AI) is revolutionizing tax processes. This session examines AI's transformative potential in tax, practical applications, implementation strategies, and the risks of Tax AI Assistants.	Upon completion of this session, attendees will be able to Identify the key functionalities and benefits of Tax AI Assistants in automating and enhancing tax processes, enabling participants to recognize areas within their own operations where AI can be most beneficial. Analyze the potential risks and ethical considerations associated with deploying Tax AI Assistants, including data security and regulatory compliance, to ensure informed decision-making during implementation. Apply best practices for integrating Tax AI Assistants into organizational workflows, including strategies for training and ongoing management, to optimize the adoption and utilization of AI technologies in tax operations	
Direct Tax	Cox Enterprises and Calendar	Cox Enterprises shares valuable insight on the transition to the new modern ONESOURCE Calendar. Have the opportunity to understand why Cox Enterprises prefers the new version, the benefits experienced, process to migrate to the newest version, and showcase the PowerBI dashboards.	Uncover advantages of migrating to the modern ONESOURCE Calendar product from a seasoned user perspective. Identify key benefits that Cox Enterprises realized by adopting the new OS Calendar. Understand migration best practices in transitioning from Calendar Classic to the new Calendar product. Preview integration capabilities with PowerBI dashboards and the enhanced analytics.	Participants should have an interest in ONESOURCE Calendar capabilities, and some familiarity with data analytics and visualization tools like PowerBI.
Direct Tax	Crafting a Connected Ecosystem: Global Compliance through Technology OR "Tech-Enabled Tax Compliance: Creating a Seamless Global Framework	Managing direct taxes globally - as US HQ and non US HQ companies are faced with global tax regulations, there is a wider need to consider how you meet direct tax requirements globally - from corporate tax returns, reporting, pillarII, cbcr. A breakout session that shows how the onesource platform comes together to benefit tax professionals with a day in the life walk through incorporating: workflow>stat reporting>tax compliance>dataflow>alteryx analysis>calendar oversight plus provisioning/GMT and dashboarding. Presenting not one single solution but a day in the life process, that appeals to stakeholders at various levels - pushing oversight, efficiency (automation/data leveraging), control - inbuilt logic, advanced analytics.		
Direct Tax	Crowe: Enhanced Reporting in ONESOURCE Tax Provision to Support New Requirements (FASB Reporting Requirements and Pillar 2)	Explore the impact of increasing tax data requirements and how to use reporting in ONESOURCE Tax Provision to meet these demands.	Upon successful completion of this course, the user should be able to: • Identify new tax reporting requirements • Distinguish between base reporting and enhanced reporting techniques for new tax reporting requirements • Identify steps to prepare data for enhanced reporting requirements	

Section	Session Title	Session Description	Session Objectives	Prerequisites
Direct Tax	Crowe: Real World APIs for Tax Provision and Compliance	A demonstration of several uses of APIs in the process of preparing tax provision and tax compliance, comparisons with other data exchange methods, and understanding the potential and current limits of APIs.	Upon successful completion of this course, the user should be able to: • Differentiate between APIs and other forms of data exchange • Recognize potential and limitations of APIs in current form • Identify specific instances where APIs can be deployed in tax processes	

2024 SYNERGY for Corporate Professionals

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Direct Tax	Customer Case Study: Implementing Data Hub and DataFlow with Disney to Drive Tax Department and Business Results	Update on 2023 "Tax Driver Replacement" - they have since added Data Lake. Update on progress/more clarity on the vision as it's being implemented/built.	Learn a case study that demonstrates successful application of ONESOURCE tools in accelerating processes and improving analytics	Participant should first attend; "Maximizing the Value of Your Data: How Data Hub and DataFlow Can Help You Get More Out of Your Data"
Direct Tax	Deloitte/OrbitaxGlobal Minimum Tax – Calm in the Chaos	Join Deloitte and Orbitax to uncover how clients are solving Pillar 2 strategically and unlocking their data to comply with changing global regulations.	Upon completion of this session, participants will be able; Demonstrate the changing Pillar 2 landscape and its impact on income tax reporting. Identify solutions clients have taken to document data sources and complexities. Prepare example roadmaps and timelines to comply with OECD guidance	
Direct Tax	Deloitte: Automating Data Flows Across the Direct Tax Lifecycle	Leading practices for leveraging data wrangling tools, dashboard reporting tools, and APIs to better automate the flow of source data and results across the direct tax lifecycle	Upon completion of this session, participants will be able; Recognize leading practices for leveraging data wrangling tools in the tax provision and compliance processes; Determine leading practices for leveraging dashboard reporting tools in the tax provision and compliance processes; Apply leading practices for leveraging APIs in the tax provision and compliance processes	
Direct Tax	Deloitte: The Next Frontier - Redefining Tax in the Age of GenAI	As the landscape of emerging technologies continually evolves, the focus is shifting towards Generative Artificial Intelligence (GenAI) and its transformative impact on tax functions. We will explore some of the challenges and opportunities presented by GenAI and cover key areas impacting tax departments. We'll discuss: 1. Insight into how the GenAI market is rapidly evolving. 2. Potential opportunities of GenAI across tax. 3. Getting started on your GenAI journey.	Upon completion of this session, participants will be able; Compare various GenAI technology solutions and scenarios accelerating digital transformation; Determine how tax departments can take advantage of these in creating an end-to-end integrated tax ecosystem; Identify challenges and opportunities around use of GenAI and the areas of impact	
Direct Tax	Discover how ONESOURCE is leveraging AI	Learn how ONESOURCE is using AI in the Platform to answer questions, suggest helpful tips, and provide smart assistance on tedious tasks. Chat with the new ONESOURCE Intelligent Assistant. See our AI-powered Predictive Account Mapping in action. Discuss what additional initiatives are underway or suggest new ones where we should take aim.	Upon completion of this session, participants will be able to: Understand the current ONESOURCE AI Initiatives and what's on the horizon Explain what the ONESOURCE Intelligent Assistant can do Understand the benefits and Predictive Account Mapping	
Direct Tax	Dishwasher skills for beginners	In this practical session, expert dishwasher loader Davis O will go over some of the fundamental skills needed for household members to achieve OK standing. We will go over basic skills, such as "not leaving dirty dishes on the counter", and progressively move to advanced topics, like placing bowls face down on the rack. In the Tips & Tricks portion of the session, we'll discuss nuances and intricacies, like the meaning of a lit-up Clean indicator, and why it's not a great idea to put your licked-clean peanut butter spoon in the utensil basket when it's turned on.	Upon completion of this session, participants will be able to: Dish it out with confidence.	To get the most out of the session, attendees should bring their own dishwasher unit.
Direct Tax	E-Filing Returns: Handle diagnostics and validations with confidence.	In this session, we will review the topic that (by far) generates the most urgent calls to ONESOURCE Support. We will go over the e-filing process with a particular emphasis on managing diagnostics and validations effectively.	Upon completion of this session, participants will be able to: Identify and understand the new software enhancements for the diagnostic tool. Navigate and resolve common e-filing diagnostics and validation issues. Apply best practices for e-filing returns using the ONESOURCE Income Tax application. Prepare for the upcoming tax season with updated knowledge on the Organizer diagnostics.	Attendees should have at least one year of experience with the ONESOURCE Income Tax application

Section	Session Title	Session Description	Session Objectives	Prerequisites
Direct Tax	EY and DataFlow TBD/COMING SOON From Nancy			
Direct Tax	EY: Provision+: Connecting OTP with enterprise capabilities to automate the end-to-end tax reporting process	The session will showcase how Tax Provison is tightly integrated with the Microsoft Power platform to extend the capabilities into upstream data integration and downstream custom reporting and analytics.	Upon completion of this session, attendees will be able to: Identify the functions and potential applications of Microsoft Power Platform tools—including Power Query, Power BI, and Power Apps—within the tax provision process, enhancing their ability to streamline workflows and manage data effectively. Recognize strategies for centralizing tax reference data, thus improving the accuracy and reliability of the information utilized within the tax function. Analyze the capabilities of Microsoft Power BI to go beyond standard reporting and demonstrate how to present tax calculations in a clear and concise manner, enabling better visualization and interpretation of tax data by stakeholders.	
Direct Tax	EY:API/Analytics	Learn how to administer and configure ONESOURCE Tax Provision APIs to create custom connected tax applications and analytics	Upon completion of this session, attendees will be able to: Identify the data points available through ONESOURCE Tax Provision (OTP) APIs. Distinguish how to administer OTP APIs and how to configure API connections into Microsoft Power Platform (Power Automate, Power BI, and Power Apps). Recognize use cases for integrating OTP APIs into different tax provision processes.	
Direct Tax	EY:State Provision/Workbook	Presentation of actual examples of how ONESOURCE Workpapers can be used to improve and streamline your state current provision calculations in ONESOURCE Tax Provision.	Upon completion of this session, attendees will be able to: Evaluate alternatives for calculating the state current tax provision utilizing ONESOURCE Workpapers (OWP). Identify the data within ONESOURCE Tax Provision that is relevant to the state provision and can be GET and SET in ONESOURCE Workpapers. Recognize the advantages and disadvantages of using OWP for facilitating the state current provision. Interpret how Excel Power Query can be used in conjunction with OWP to support the state current provision calculation.	
Direct Tax	Frequently Asked Questions and Best Practices for ONESOURCE Income Tax International	Want to avoid the most common ONESOURCE Income Tax International module mistakes? Wondering what you should keep in mind when getting ready to start the new year? Solutions to many of the most frequently asked questions from clients will be the focus of this session.	Upon completion of this session, participants will be able to: Understand the process for getting the new year started as well as resolutions to common questions and challenges.	Participants should have a working knowledge of ONESOURCE Income Tax International and a basic understanding of international tax concepts to gain the most from this session.

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Direct Tax	Get More from Tax Provision Data with Dashboard Reporting, APIs, and Connectors	Enhance your tax operations by unlocking the potential of tax provision data in this informative learning session. Explore how ONESOURCE Tax Provision (OTP) APIs, the SAP OTP connector, and Dashboards can take your tax processes to the next level. Learn how to use these automation and visualization tools to pull calculated data for Global Minimum Tax, quickly understand the impact resulting from effective tax rate drivers waterfalls, and more.	Upon completion of this session, participants will be able to: Understand automation and visualization tools and their application on ONESOURCE Tax Provision data.	Participants should have a working knowledge of basic tax concepts and familiarity with the tax provision calculation process.
Direct Tax	Grant Thornton: Hilton Grand Vacations overcomes operational challenges of Pillar II	Join this session, where Hilton Grand Vacations will discuss the data, technology and process challenges they faced during their Pillar II journey and how they ultimately found success. Learn how leading practices, along with the suite of ONESOURCE and Orbitax tools that can be used to effectively operationalize Pillar II.	Upon successful completion attendees will be able to; Recognize and share common challenges that companies have had to face on their Pillar II journey. Identify solutions and tools that can be used to solve for data, technology and process challenges. Analyze leading practices to develop and refine a roadmap to operationalize Pillar II.	
Direct Tax	Grant Thornton: Unlocking hidden insights: Using APIs and Alteryx to extend ONESOURCE reporting capabilities	Unlock the hidden potential of your data—join us as we explore the power of Application Programming Interfaces (APIs) to seamlessly export data from ONESOURCE. During this session you'll learn how to leverage this data with Alteryx, a powerful data analytics tool, to create custom reports that go beyond the standard offerings.	Upon completion of this session, participants will be able; Explain the role and benefits of APIs in data extraction from ONESOURCE. Identify strategies for building reports that address specific business needs, exceeding standard ONESOURCE reporting capabilities. Apply the ability to leverage exported data for deeper analysis and informed decision-making.	
Direct Tax	Industry Vertical: OIT: Elevating Insurance Tax Practices	Delve into best practices for TAS within the insurance sector. Learn how to optimize tax processes and leverage technology to ensure accurate and efficient tax reporting. We aim to provide a comprehensive overview that will help professionals enhance their TAS strategies in the insurance industry.	Analyze the impact of technological advancements on tax accounting within the insurance sector. Apply key strategies to mitigate tax-related risks and enhance compliance in insurance operations. Evaluate case studies demonstrating successful TAS implementation in the insurance industry.	Participants should have a working knowledge of tax accounting principles and be familiar with the insurance industry's regulatory environment.
Direct Tax	Introduction to 1065, State A&A for 1065 Returns, and data automation.	In this session, we will delve into managing and automating 1065 tax forms and State A&A for 1065 Returns. We will explore the latest advancements in partnership data management, focusing particularly on the integration of Data Connect and new import tools within the ONESOURCE Income Tax software.	Upon completion of this session, participants will be able to: Identify key aspects and current trends related to 1065s and State A&A for 1065 Returns. Utilize Data Connect for efficient partnership data management. Understand the benefits of automation in tax workflows and how it can be applied to 1065 Returns.	Participants should have a working knowledge of basic tax concepts and some experience with partnership tax preparation.
Direct Tax	Introduction to New ONESOURCE Tax Provision	In this practical session, attendees will explore for themselves the intuitive user interface of New Tax provision. Knowledgeable instructors will be available to guide and answer your questions.	Upon completion of this session, participants will be able to: Navigate confidently through the New Tax Provision interface. Identify key features and tools within the software that can aid in tax provision tasks. Apply basic functions of New Tax Provision to real-world tax scenarios. Assess how New Tax Provision can be integrated into their own current tax workflows.	Attend "Introduction to New ONESOURCE Tax Provision" lecture. Bring with you: Laptop with browser and network connection. To help facilitate your attendance decision, please note that New Tax Provision <u>does not</u> currently support: More than 500 units, flow-through calculations, integrations with other ONESOURCE products, Global Access Module, plug-in reports, or interim-period reporting.

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Direct Tax	Introduction to New ONESOURCE Tax Provision	In this session, we will review the next-generation Tax Provision software, exploring its user interface, capabilities, and the recent enhancements made. We'll also take a look at the strategic roadmap laid out for the 2025 development cycle.	Upon completion of this session, participants will be able to: Identify the key features and improvements in the New Tax Provision software. Understand the enhancements that have been integrated into the software. Assess the 2025 development roadmap and determine if New Tax Provision is the right fit for your company.	Participants should have a working knowledge of tax provision processes and the current software tools used in their organization. To help facilitate your attendance decision, please note that New Tax Provision does not currently support: More than 500 units, flow-through calculations, integrations with other ONESOURCE products, Global Access Module, plug-in reports, or interim-period reporting.
Direct Tax	Introduction to ONESOURCE APIs - Part 1	In this practical session, you will apply your knowledge from the "Introduction to ONESOURCE APIs - Part 1" lecture. You'll configure a new API application in ONESOURCE and try out various API calls using the Developer Portal web site. Experienced instructors will guide you through the process and be on hand to provide personalized support and answer questions.	Upon completion of this session, participants will be able to: Configure a new application in the ONESOURCE API Administration interface. Execute GET, POST, and PATCH requests to interact with ONESOURCE application data. Simulate a simple API-enabled automation. Troubleshoot common issues encountered during API integration.	Participants should have a working knowledge of ONESOURCE products. Attend "Introduction to ONESOURCE APIs - Part 1" lecture. Bring with you: Laptop with browser and web connection.
Direct Tax	Introduction to ONESOURCE APIs - Part 1	in this session, we will explain the concept of APIs and review common use cases within the context of ONESOURCE. We'll tour the ONESOURCE API Administration tile and the recently-updated Developer Portal where you can browse and test various ONESOURCE application APIs, including Master and Reference Data APIs.	Upon completion of this session, participants will be able to: Define what APIs are and explain their significance for ONESOURCE applications. Identify common use cases for APIs within the ONESOURCE platform. Navigate the updated Developer Portal to locate and test various ONESOURCE APIs. Understand the role of the ONESOURCE API Administration tile in managing API interactions.	Participants should have a working knowledge of ONESOURCE products.
Direct Tax	Introduction to ONESOURCE APIs - Part 2	In this practical session, you will apply your knowledge from the "Introduction to ONESOURCE APIs - Part 2" lecture. We'll create from scratch a real-time dashboard report by using an OData interface to pull ONESOURCE Income Tax data directly into Excel. We will then further transform the data into meaningful charts and reports. Experienced instructors will be available to guide you through this exercise.	Upon completion of this session, participants will be able to: Create a new API-enabled reporting dashboard. Troubleshoot common issues encountered during API integration.	Participants should have a working knowledge of ONESOURCE products. Attend "Introduction to ONESOURCE APIs - Part 2" lecture. Bring with you: Laptop with Excel, browser, and web connection.

Section	Session Title	Session Description	Session Objectives	Prerequisites
Direct Tax	Introduction to ONESOURCE APIs - Part 2	In this session, we will expand upon the foundation laid in the "Introduction to ONESOURCE APIs - Part 1" lecture and follow-along sessions. We will explore advanced API applications, methods, and various end points in ONESOURCE. We will demonstrate how we can use ONESOURCE's OData-enabled interfaces to create robust and meaningful dashboards in Excel.	Upon completion of this session, participants will be able to: Understand the application of OData-enabled interfaces in the context of ONESOURCE. Analyze real-world case studies for API-enabled application design. Understand the tools and methods discussed to enhance the development and integration of applications with ONESOURCE.	Participants should have a working knowledge of ONESOURCE products. Attend "Introduction to ONESOURCE APIs - Part 1" lecture.
Direct Tax	Introduction to ONESOURCE Data Hub	This session will provide an introduction to ONESOURCE Data Hub capabilities to demonstrate how data from external sources can be converted to be aligned and ready for use in various ONESOURCE Solutions and in third party tools.	Upon completion of this session, participants will be able to: Recognize procedures and techniques to leverage ONESOURCE Data Hub in uploading, transforming, and accessing data along with related ONESOURCE product integrations and external access patterns.	Participants should have a working knowledge of basic data management principles and familiarity with ONESOURCE products to maximize the benefits of this session.
Direct Tax	Introduction to ONESOURCE Data Query - Reporting	In this session, we will explore ONESOURCE's newest tile "Data Query - Reporting", which enables flexible and custom data extractions from ONESOURCE Income Tax Domestic and International, Tax Provision, and Statutory Reporting.	Upon completion of this session, participants will be able to: Understand the functionality of the new "Data Query - Reporting" tile within ONESOURCE. Extract relevant data efficiently from ONESOURCE modules. Understand the applications of extracted data in tax analysis and decision-making processes.	Participants should have a working knowledge of the current ONESOURCE software suite
Direct Tax	Introduction to ONESOURCE Data Query - Reporting	In this practical session, we will practice our learnings from the "Introduction to ONESOURCE Data Query - Reporting" lecture. We will perform custom queries to extract ONESOURCE Income Tax data from multiple entities and time periods and produce meaningful results. Knowledgeable instructors will be available to guide and answer your questions.	Upon completion of this session, participants will be able to: Apply the principles learned from the lecture to real-world data extraction scenarios. Execute custom queries to efficiently extract data from ONESOURCE Income Tax for different entities and periods. Troubleshoot common issues that may arise during the data extraction process. Enhance their understanding of the Data Query - Reporting tool through practical experience.	Participants should have a working knowledge of the current ONESOURCE software suite Attend "Introduction to ONESOURCE Data Query - Reporting" lecture. Bring with you: Laptop, Browser, and network connection.
Direct Tax	Introduction to ONESOURCE DataFlow	In this practical session, we will practice the learnings from the "Introduction to ONESOURCE DataFlow" lecture. We will design, protect, and deploy an Excel-based DataFlow template. Knowledgeable instructors will be available to guide and answer your questions.	Upon completion of this session, participants will be able to: Design an Excel-based DataFlow template. Dynamically pull entity-specific trial balance out of ONESOURCE Data Hub. Deploy DataFlow template and create data collection requests. Design an extraction workbook to pull and aggregate DataFlow data.	Bring with you: Laptop, Browser, Internet connection, and download and install DataFlow add-in ahead of time. Attend "Introduction to ONESOURCE DataFlow" lecture.
Direct Tax	Introduction to ONESOURCE DataFlow	In this session, we will introduce you to ONESOURCE DataFlow, a module designed to streamline Excel-based data collection and workbook management. We'll learn how to design templates, incorporate data diagnostics, send automated reminders, assign data providers, aggregate results, integrate with other ONESOURCE tools, and roll-forward data to the next period.	Upon completion of this session, participants will be able to: Understand the purpose of DataFlow templates in the data collection process. Understand the various DataFlow features that ease and automate data collection tasks. Understand how DataFlow data can be aggregated and integrated with other ONESOURCE applications. Understand the capabilities of the DataFlow roll-forward process.	

Section	Session Title	Session Description	Session Objectives	Prerequisites
Direct Tax	Introduction to ONESOURCE Events	This training session will focus on introducing users to a new automation feature within ONESOURCE, which involves leveraging Webhooks. Webhooks are a powerful tool for automating processes and facilitating communication between different software applications. During the session, users will learn how to set up and utilize Webhooks effectively within the ONESOURCE platform.	Upon completion of this session, participants will be able to: Define what a Webhook is and understand its role in automation within the ONESOURCE platform. Differentiate between Webhooks and APIs, grasping their respective functionalities and applications. Identify which ONESOURCE products offer Webhook options and comprehend their significance in streamlining processes. Evaluate the various Webhook options available within ONESOURCE applications and explore potential use cases for each.	Participants should have a working knowledge of ONESOURCE products and technical knowledge in software integration and automation.
Direct Tax	Introduction to ONESOURCE Global Access Manager	This session will cover the web-based ONESOURCE Global Access module that enables foreign controllers to provide critical tax provision data in a controlled and timely way. We'll review the flexible data gathering screens, available reports, sign-off sequence, questionnaires, and user setup including group functionality.	Upon completion of this session, participants will be able to: Recognize and interpret procedures and techniques to successfully configure ONESOURCE Global Access including data gathering screens, available reports, sign-off sequence, questionnaires, and end-user setup.	Participants should have a working knowledge of basic tax concepts and familiarity with the tax provision calculation process.
Direct Tax	Introduction to ONESOURCE Tax Provision v2016	This session will orient attendees to ONESOURCE Tax Provision (version 2016) by covering the navigation paradigms, data review functions, drill-down capabilities, and data entry and transfer functionality.	Upon completion of this session, participants will be able to: Identify the navigational steps and processes associated with the 2016 version of ONESOURCE Tax Provision.	Participants should have a working knowledge of basic tax concepts and familiarity with the tax provision calculation process.
Direct Tax	Introduction to ONESOURCE Tax Provision v2016	In this practical session, you will practice your learnings from the "Introduction to ONESOURCE Tax Provision v2016" lecture. Learn to navigate, populate data, review results, and run reports with confidence.	Upon completion of this session, participants will be able to: Navigate the ONESOURCE Tax Provision v2016 interface with confidence. Enter and manage tax data accurately within the system. Analyze and interpret tax provision results effectively.	Participants should have a working knowledge of basic tax concepts and familiarity with the tax provision calculation process. Attend "Introduction to ONESOURCE Tax Provision v2016" lecture. Bring with you: laptop with browser and network connection.
Direct Tax	Introduction to ONESOURCE Workpapers	In this practical session, we will apply our learnings from the "Introduction to ONESOURCE Workpapers" lecture. We'll design an Excel workbooks that sends and receives in real-time data from ONESOURCE Tax Provision. Knowledgeable instructors will be available to guide and answer your questions.	Upon completion of this session, participants will be able to: Apply the foundational knowledge of ONESOURCE Workpapers to a practical scenario. Construct Excel workbooks that interface effectively with ONESOURCE Tax Provision.	Attend "Introduction to ONESOURCE Workpapers" lecture. Download and install Workpapers add-in ahead of session. Participants should have a working knowledge of Microsoft Excel and ONESOURCE Tax Provision. Attendees must download and install the ONESOURCE Workpapers Excel add-in.
Direct Tax	Introduction to ONESOURCE Workpapers	This session will cover the Workpapers Excel add-in and how to "Get" ONESOURCE Tax Provision data into Excel, perform calculations/valuations, and then "Set" data back into ONESOURCE. Practical applications include: Book/tax adjustments, State NOL, VA utilization/generation, etc.	Upon completion of this session, participants will be able to: Identify the key features, benefits, and navigational processes for the ONESOURCE Workpapers application.	Participants should have a working knowledge of basic tax concepts and familiarity with ONESOURCE Tax Provision software.

2024 SYNERGY for Corporate Professionals

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Direct Tax	Introduction to Orbitax's International Tax Platform and Global Minimum Tax module	In this session, we will explore the functionality of Orbitax's Global Minimum Tax solution, focusing on its user interface and the application of best practices in design and configuration. We will also provide insights into how the Orbitax solution can be integrated into current tax processes for BEPS Pillar 2 compliance. An engaging client case study will illustrate the tangible benefits and practical use of the solution in a real-world scenario.	Upon completion of this session, participants will be able to: Grasp the full range of functionalities offered by the Orbitax Global Minimum Tax solution. Integrate the Orbitax solution into their existing tax processes for BEPS Pillar 2 provision and compliance. Recognize the advantages of adopting best practices for the design, configuration, and testing of the solution.	Participants should have a working knowledge of international tax compliance, specifically with regard to the BEPS Pillar 2 framework, to maximize the benefits of this session.
Direct Tax	Introduction to Processing 5471s In ONESOURCE Income Tax International	This session is designed for clients that are new to ONESOURCE Income Tax International. You will learn about setting up and using the software to process your controlled foreign corporation (CFC) return, including the calculation of Subpart F, cash dividends, and the gross ups on them.	Upon completion of this session, participants will be able to: Recognize ONESOURCE Income Tax International module best practices for Form 5471 processing.	Participants should have a working knowledge of ONESOURCE Income Tax International and a basic understanding of international tax concepts to gain the most from this session.
Direct Tax	Introduction to the New General Ledger Manager	This session will provide an introduction to ONESOURCE General Ledger Manager capabilities to demonstrate how Trial Balances from multiple ERPs can be combined and aligned to be ready for use in various ONESOURCE solutions and in third party tools.	Upon completion of this session, participants will be able to: Recognize procedures and techniques to leverage ONESOURCE General Ledger Manager to harmonize and transform uploaded trial balance data. Understand the transformation capabilities to create Consolidated Trial Balances that are available to ONESOURCE products and other external applications.	Attendees should have a basic understanding of Financial Accounting for Trial Balances
Direct Tax	Introduction to the new ONESOURCE Workflow	Discover the new ONESOURCE Workflow and reimagine your current processes. Learn how the new Workflow pulls together related information from across ONESOURCE through seamless integration with Calendar, DataFlow, Income Tax and Statutory Reporting. We'll highlight current capabilities, explore workflow template design and wrap up with a look ahead to 2025.	Upon completion of this session, participants will be able to: Identify and understand the key features currently available in ONESOURCE Workflow. Explain how ONESOURCE Workflow integrates with ONESOURCE Income Tax, DataFlow, Calendar, and Statutory Reporting. Navigate confidently through the user interface of ONESOURCE Workflow. Understand the setup and management of workflow templates.	Participants should have a working knowledge of ONESOURCE products.
Direct Tax	Introduction to the new ONESOURCE Workpapers	In this practical session, we will practice our learnings from the "Introduction to the new ONESOURCE Workpapers" lecture. We will use Excel to send and receive data from the ONESOURCE Income Tax Organizer module and various Forms. Knowledgeable instructors will be available to guide and answer your questions.	Upon completion of this session, participants will be able to: Apply the techniques learned in the "Introduction to the new ONESOURCE Workpapers" lecture to real-world scenarios. Execute data transfers between Excel and ONESOURCE Income Tax with confidence.	Attendees should be familiar with ONESOURCE Income Tax. Bring with you: Laptop, Browser, Internet connection, and download and install the next generation Workpapers add-in ahead of time. Attend "Introduction to the new ONESOURCE Workpapers" lecture.
Direct Tax	Introduction to the new ONESOURCE Workpapers	In this session, we will introduce the next generation of ONESOURCE Workpapers software. Workpapers unifies, and will eventually replace, all ONESOURCE-related Excel add-ins (Data Import, Workpapers, and Dif/Kat, DataFlow, etc.) We will learn how the Excel Workpapers add-in sends and receives data from the Organizer and various Forms. We will also review the product roadmap for 2025, which includes the onboarding of additional ONESOURCE products.	Upon completion of this session, participants will be able to: Describe how the ONESOURCE Workpapers software serves as a unifying platform for Excel add-ins. Understand the send/receive capabilities between Excel, the Organizer, and various forms. Identify the key milestones and features in the ONESOURCE Workpapers product roadmap for 2025. Understand the 2025 roadmap and onboarding process for additional ONESOURCE products.	Participants should have a working knowledge of the current ONESOURCE software suite

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Direct Tax	KPMG and Verizon: Navigating Digital Transformation and Organizational Adaptation to Drive Automation	Explore how Verizon and KPMG navigated digital transformation and the transition onto the ONESOURCE suite of tools for compliance, provision and planning. Learn about their journey, the challenges faced, and the strategies used to drive further automation throughout the tax department.	Upon completion of this session, participants will be able to Recognize the process and challenges involved in navigating digital transformation and organizational adaptation within a large corporation. Analyze the benefits and outcomes of this transformation journey, providing a roadmap for similar endeavors. Identify the strategic use of ONESOURCE Income Tax APIs in driving automation.	
Direct Tax	KPMG: Accelerating the tax close cycle with Alteryx and the ONESOURCE suite of tools	How to leverage the ONESOURCE suite of tools and Alterxy to accelerate your close cycle	Upon successful completion attendees will be able to identify options to accelerate the close cycle using a combination of ONESOURCE and Alteryx, and determine the appropriate methodology for the close cycle.	
Direct Tax	KPMG: Customer Roundtable - Leading Practices for ONESOURCE and Alteryx Implementation & Integration with the ERP System	Customers discuss their experiences working with Alteryx and various ONESOURCE products to maximize efficiency in their Tax department and integrations to their ERP systems.	Upon successful completion of this session, attendees will be able to recognize ONESOURCE products that can aid in automating state income tax processes, determine design concepts that apply to their specific processes, and identify where the implementation of Alteryx and ONESOURCE tools can yield the greatest benefits and optimize overall efficiency across state income tax processes.	
Direct Tax	Mastering charts and accounts management in the ONESOURCE Platform	This session will cover the functionality and intricacies for centrally managing charts of accounts in the ONESOURCE platform and how these critical data are shared between the various ONESOURCE solutions.	Upon completion of this session, participants will be able to: Identify the core functionalities of the ONESOURCE Central Chart of Accounts. Apply techniques to manage and maintain the Master Accounts within ONESOURCE. Understand the process of creating Account Rollups and their significance in financial reporting. Recognize the integration points of Charts of Accounts with other ONESOURCE products and how to leverage them for enhanced data consistency and accuracy.	Attendees should have a basic understanding of Financial Accounting Master Data for Charts of Accounts concepts
Direct Tax	ONESOURCE Calendar: Discover How a Top Enterprise Organized its Critical Due Dates	In this session, we will delve into a journey that a large company took with ONESOURCE Calendar. Participants will gain insight into the features and benefits of Calendar, as well as learn about the strategies and tools used by the enterprise to successfully organize and manage thousands of crucial deadlines.	Upon completion of this session, participants will be able to: Describe the features that Calendar offers to enhance organizational efficiency. Discuss the process followed by the leading enterprise to track and automate tax due dates.	
Direct Tax	ONESOURCE Income Tax: Tips & Tricks	In this session, we will delve into methods to streamline the Federal and State tax return preparation process. We will share best practices and provide you with practical tips to not only speed up your preparation and review but also to maximize the benefits from using ONESOURCE.	Upon completion of this session, participants will be able to: Identify key strategies for efficient tax return preparation. Apply best practices for federal and state tax returns to ensure accuracy and compliance. Utilize tips to expedite the preparation and review process of tax returns.	Attendees should have at least one years of experience with the ONESOURCE Income Tax application. Familiarity with federal and state tax regulations will be beneficial for following the content of this session.
Direct Tax	Payable and Journal Entry Functionality & Reporting	This session will cover how to configure payable column headers, auto postings of RTP and current tax expenses, as well as the steps included in calculating the tax journal entry, core calculation, and journal entry profiles.	Upon completion of this session, participants will be able to: Recognize the general functionality of the ONESOURCE Tax Provision payable and journal entry process and identify steps to generate a report to book entries in the general ledger for the provision results.	Attendees should have at least one year of experience with the ONESOURCE Tax Provision application

Section	Session Title	Session Description	Session Objectives	Prerequisites
Direct Tax	Pillar 2: Mastering Global Minimum Tax Data: Automation and Integration Strategies	In this session, we will delve into the intricacies of managing data challenges associated with the Global Minimum Tax. Attendees will gain insights into the practical steps that can be taken to streamline data sourcing and improve the efficiency of tax provision processes. By exploring the capabilities of ONESOURCE Tax Provision and the integration with Orbitax GMT, participants will learn about the technological advancements that facilitate the automation of data workflows, particularly during the critical periods of quarter closes.	Upon completion of this session, participants will be able to: Identify the challenges in managing data for Global Minimum Tax compliance. Evaluate options for automating the data collection process from various external systems. Recognize the advantages of implementing automated workflows in standardizing and expediting data loading. Understand the API connection and its role in enhancing the efficiency between Orbitax GMT and ONESOURCE Tax Provision. Acknowledge the benefits of automated standardized data connections for reliable and swift global minimum tax calculations.	Participants should have a working knowledge of: Basic tax accounting principles. The fundamentals of Global Minimum Tax requirements. Familiarity with ONESOURCE Tax Provision software.
Direct Tax	Processing Foreign Derived Intangible Income (FDII) Using ONESOURCE Income Tax International	This session will cover all aspects of the processing of Foreign Derived Intangible Income (FDII) including the population of data using the recently added Foreign Derived Income screen, the processing of that data during the International Foreign Tax Credit calculation, the allocation of any Section 250 FDII and GILTI deduction to the underlying entities, the reports that reflect the results, and the flow of information to Form 8993.	Upon completion of this session, participants will be able to: Identify how to populate data needed to calculate Foreign Derived Intangible Income (FDII), Understand how that data is processed through calculations and allocated to underlying entities Understand the reflection of results in international reports Understand how the information flows to Form 8993.	Participants should have a working knowledge of ONESOURCE Income Tax International and a basic understanding of international tax concepts to gain the most from this session.
Direct Tax	Processing GILTI Through ONEOURCE Income Tax	This session will cover how to process global intangible low-taxed income (GILTI), integration with Section 163(j) calculations, and how to populate Form 8992 through ONESOURCE Income Tax.	Upon completion of this session, participants will be able to: Recognize methods to process global intangible low-taxed income (GILTI) using ONESOURCE Income Tax and how the results flow to Forms 8992 and 5471.	Participants should have a working knowledge of ONESOURCE Income Tax International and a basic understanding of international tax concepts to gain the most from this session.
Direct Tax	Reconciling Transfer to Form 1118	In this session we will cover changes in the tax return forms over the past year. You will learn how the ONESOURCE Income Tax International module constructs information for transfer to various schedules of Form 1118.	Upon completion of this session, participants will be able to: Identify how data flows from various international reports and is compiled for transfer to Form 1118.	Participants should have a working knowledge of ONESOURCE Income Tax International and a basic understanding of international tax concepts to gain the most from this session.
Direct Tax	Reconciling Transfer to Forms 5471, 8865 and 8858	In this session we will cover changes in the tax return forms over the past year. You will learn how the ONESOURCE Income Tax International module constructs information for transfer to various foreign form schedules.	Upon completion of this session, participants will be able to: Identify how data flows from various international reports and is compiled for transfer to the foreign forms.	Participants should have a working knowledge of ONESOURCE Income Tax International and a basic understanding of international tax concepts to gain the most from this session.
Direct Tax	Reporting and Presenting Deferred Tax	In this practical session, we will practice what we learned in the "Reporting and Presenting Deferred Tax" lecture.	Upon completion of this session, participants will be able to: Demonstrate the steps for the creation of user-defined columnar expansion and the adjustment rollup functionality for the deferred balances report.	Attend "Reporting and Presenting Deferred Tax" lecture. Participants should have a working knowledge of basic tax concepts and familiarity with the tax provision calculation process.

2024 SYNERGY for Corporate Professionals

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Direct Tax	Reporting and Presenting Deferred Tax	This session will cover the calculation logic for activity, deferred-only, and balance-sheet-only data entry fields for temporary differences, classes for assignment to deferred roll-forward report columns, and more.	Upon completion of this session, participants will be able to: Identify the steps for the creation of user-defined columnar expansion and the adjustment rollup functionality for the deferred balances report.	Participants should have a working knowledge of basic tax concepts and familiarity with the tax provision calculation process.
Direct Tax	Safeguard and Streamline the administration of your ONESOURCE Instance.	In this session, we will review ONESOURCE's Administration tile. Discover how to streamline your ONESOURCE instance, from setting up user and application security to implementing Single Sign-on. We will explore the benefits of using groups for efficiency and introduce you to the new Reports module, as well as other configuration options available for administrators.	Upon completion of this session, participants will be able to: Setup users within ONESOURCE manually or via import. Create and manage groups for efficient permission assignments. Understand what Reference Data is and its role in ONESOURCE. Identify the functions and benefits of the Common Entity module. Recognize how Single Sign-On (SSO) impacts the administration of ONESOURCE. Gain knowledge of the new Reporting module and how to use it. Configure settings within the ONESOURCE platform to optimize performance.	
Direct Tax	Seamless Data Integration Between ONESOURCE Income Tax, Tax Provision, and State Apportionment	In this session, you will learn about the data integration between three key ONESOURCE modules: Income Tax, Tax Provision, and State Apportionment. There will be special focus on the setup and configuration processes.	Upon completion of this session, participants will be able to: Identify the types of data shared between ONESOURCE Income Tax, Tax Provision, and State Apportionment. Understand the data flow and how it impacts tax reporting and compliance. Set up the necessary configurations to facilitate data integration.	Attendees should have at least one or more years of experience with the ONESOURCE Income Tax, Tax Provision, and/or State Apportionment applications
Direct Tax	Setting Up the State Taxable Income Workpapers	This session will cover how to implement the state taxable income workpapers - often an unused or underutilized area that is included in your subscription of ONESOURCE Income Tax. You will learn a simple process that will save you time entering your state modifications and adjustments.	Upon completion of this session, participants will be able to understand best practices for setting up state taxable income workpapers and how to apply to their processing.	Attendees should have at least one year of experience with the ONESOURCE Income Tax application.
Direct Tax	Setting Up the State Taxable Income Workpapers	In this practical session, we will practice our learnings from the "Setting Up the State Taxable Income Workpapers" lecture. Knowledgeable instructors will be available to guide and answer you questions.	Upon completion of this session, participants will be able to: Demonstrate best practices for setting up state taxable income workpapers and how to apply to their processing.	Attendees should have at least one year of experience with the ONESOURCE Income Tax application. Attend "Setting Up the State Taxable Income Workpapers" lecture.
Direct Tax	State Combined/Consolidated Returns Best Practices	In this informative session we will demystify state combined / consolidated return preparation and focus on preparation best practices and tips.	Upon completion of this session, participants will be able to: Understand the fundamental concepts and requirements of state combined/consolidated tax returns. Apply best practices for efficient and effective preparation of combined/consolidated returns. Recognize potential pitfalls and learn how to avoid them during the preparation process.	Attendees should have at least two years of experience with the ONESOURCE Income Tax application. Familiarity with state tax regulations will be beneficial for following the content of this session.
Direct Tax	State Combined/Consolidated Returns Best Practices	in this practical session, we'll practice our learnings from the "State Combined/Consolidated Returns Best Practices" lecture. Experienced instructors will be available to guide you through this exercise.	Upon completion of this session, participants will be able to: Understand the basics of preparing combined/consolidated returns Identify common pitfalls and challenges. Apply best practices for accurate and efficient tax return consolidation.	Participants should have a working knowledge of state taxation principles. Attend the "State Combined/Consolidated Returns Best Practices" lecture or possess equivalent foundational knowledge of combined/consolidated tax returns. Bring with you: Laptop with browser and web connection.

2024 SYNERGY for Corporate Professionals

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Direct Tax	Tax Incentives for Innovation***	Delve into the world of tax incentives for innovation, focusing on how it's encouraged through research and development (R&D) through various tax reliefs and credits. Gain a deeper understanding of the types of incentives available, how to qualify for them, and the process of claiming these benefits. We will also discuss the strategic role these incentives play in fostering innovation within companies and the broader economic impact of such tax policies. *[modify to include Neo.Tax/OIT + Customer Story]*		
Direct Tax	The Digital Shift: How Emerging Technologies are Redefining Tax Compliance	Focus on challenges and opportunities presented by digitalization in the tax compliance space, including the use of technology to streamline compliance processes and mitigate risks. We'll discuss how digitalization is transforming tax enforcement and reporting, and what this means for businesses and tax professionals.	Implement strategies to leverage technology for improved tax compliance and risk management. Anticipate future developments in tax legislation and enforcement related to digital transactions and services	
Direct Tax	Understanding Return to Provision True-Up	This session will cover the automated methodology for representing federal and state return to provision entries in ONESOURCE Tax Provision, and system requirements to identify and post true-up items into the current provision dataset.	Upon completion of this session, participants will be able to: Identify the steps required for the system to calculate and post true-up amounts in the current provision data set.	Participants should have a working knowledge of basic tax concepts and familiarity with the tax provision calculation process.
Direct Tax	Using ONESOURCE Income Tax International to Calculate the 163(j) Business Interest Expense Limitation for Your Foreign Entities	This session will cover all aspects of the Section 163(j) Business Interest Expense Limitation for foreign entities to include the population of data using new workpapers, calculations under the stand-alone and grouping methods, integration of adjustments with Subpart F and GILTI processing, and the transfer of results to Form 5471/8990 in Organizer.	Upon completion of this session, participants will be able to: Identify how to populate data needed to calculate any Section 163(j) Business Interest Expense Limitation and how that data is processed, and the results transferred to Form 8990.	Participants should have a working knowledge of ONESOURCE Income Tax International and a basic understanding of international tax concepts to gain the most from this session.
Direct Tax	What's new in DataFlow	Learn about new and upcoming ONESOURCE DataFlow features and envision how they can enable your organization to improve data collection and workbook automation processes.	Upon completion of this session, participants will be able to: Recognize the direction and enhancements being released for ONESOURCE DataFlow.	Attendees should be familiar with ONESOURCE DataFlow.
Direct Tax	What's new in ONESOURCE Income Tax Domestic	This session provides an overview of the new features that will be released for clients for the 2024 form year.	Upon completion of this session, participants will be able to: Identify the new functionality in the ONESOURCE Income Tax Domestic module and what is planned for the 2025 roadmap.	Attendees should be familiar with ONESOURCE Income Tax.
Direct Tax	What's new in ONESOURCE Income Tax International	This session will explore what's new and what's planned for ONESOURCE Income Tax International.	Upon completion of this session, participants will be able to: Identify the new functionality in the ONESOURCE Income Tax International module and what is planned for the 2025 roadmap.	Participants should have a working knowledge of ONESOURCE Income Tax International and a basic understanding of international tax concepts.
Direct Tax	What's new in ONESOURCE Tax Provision	In this session, we will learn about the recent features introduced in OTP v2016, explore the newly available APIs, and gain insights into our next generation New Tax Provision software. Additionally, we will discuss the 2025 enhancements roadmap.	Upon completion of this session, participants will be able to: Identify the key enhancements introduced in ONESOURCE Tax Provision. Understand the functionality and benefits of the new v2016 APIs. Outline the strategic roadmap for ONESOURCE Tax Provision enhancements in 2025.	Attendees should be familiar with ONESOURCE Tax Provision
Exams	ONESOURCE Certification Exam Testing	All SYNERGY attendees receive a FREE ONESOURCE Certification Exam from ONESOURCE University. Up your game, validate your expertise, and become a certified ONESOURCE user at this year's SYNERGY conference.	Upon successful completion of a certification exam, participants will be a Certified ONESOURCE Professional, Expert, or Administrative User, a recognized and valued credential in the field of ONESOURCE tax and trade products.	
Global Trade	GT300 - Launch into AI with AI HS Classifier	This product training session will dive into our new AI HS Classifier tool and how our customers can integrate AI capabilities into their global trade program.	Upon completion of this session, participants will be able to leverage the AI HS Classifier tool.	Basic knowledge of Global Classification

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Global Trade	GT320 - Making the Most of Your GTM EcoSystem	This product training session will review the components of the GTM ecosystem and how ONESOURCE Global Trade modules work best together to create an efficient and effective trade compliance platform.	Upon completion of this session, participants will be able to recognize the GTM ecosystem and how OSGT enables global trade operations.	Basic knowledge of current Global Trade platform
Global Trade	GT330 - Global Trade Product Modernization: Are You Ready to Level Up Your User Experience?	This product training session will focus on major product modernization efforts being released in Export and Import Management, Global Classification, Global Trade Content, and Free Trade Agreement. Learn about the positive changes to user experience.	Upon completion of this session, participants will be able to recognize modernized features across the Global Trade platform, as well as know how to leverage them in their own environments.	Basic knowledge of current Global Trade platform
Global Trade	GT340 - User Data Management: Learn How to Take Control of Your Trade Data & Improve System Performance	This product training session will focus on the the User Data Management tool and how customers can leverage this tool to manage the data in their ONESOURCE GTM platform to improve system performance and data quality.	Upon completion of this session, participants will be prepared to use the User Data Management tool in their ONESOURCE GTM modules.	Basic knowledge of current Global Trade platform
Global Trade	GT360 - Leveraging CLEAR, Denied Party Screening & Supply Chain Compliance for Supply Chain Risk Management	Join us for a session on tools that can be leveraged in supply chain risk management programs - CLEAR, Denied Party Screening, and Supply Chain Compliance. We will review the coverage of each module and how they can fit into a wholistic risk management plan.	Upon completion of this session, customers will have a full understanding of CLEAR, DPS, and SCC.	Working knowledge of trade compliance and basic understanding of supply chain risk
Global Trade	GT370 - Utilizing Content and Content Analyzers to Drive Sourcing Decisions	This product training session will explore the role of Global Trade Content in sourcing decisions and opportunities for limiting duty impact by leveraging the Content Analyzer suite - Trade Lane Analyzer and Tariff Analyzer.	Upon completion of this session, participants will be able to identify the Global Trade Content analyzer tools that are designed to support strategic sourcing decisions.	Basic knowledge of trade compliance
Global Trade	GT380 - Catching the Catalyst: How GTM is Improving For You!	In this session, we will review the major investment items completed and planned in our Global Trade platform. We will provide an overview of this major initiative, as well as gains in speed and performance, as well as user experience.	Upon completion of this session, participants will be well versed in the updates being made to the Global Trade platform that will improve performance, reliability, and experience.	Basic knowledge of current Global Trade platform
Global Trade	GT390 - US Foreign Trade Zone Workshop	Join us for an in-depth 10-hour workshop during the SYNERGY conference focusing on the US Foreign Trade Zone. We will walk through comprehensive training on FTZ distribution processing, CBP reports, FTZ validation & data correction tools, and tips on troubleshooting inventory out-of-balances. This workshop is taught by an LCB and experienced TR Professional Services team member and will be eligible for ONESOURCE University certification (pending exam results at the end of the conference.)	After successful completion of this workshop, participants should be prepared to successfully pass the ONESOURCE University Certified User exam for the ONESOURCE FTZ module. Participants will be able to operate as an independent zone operator for distribution processing, troubleshoot and resolve validation errors in daily operations through thorough understanding of available tools and descriptions, understand and submit CBP reporting through ONESOURCE, and learn best practices for zone balancing on a daily basis.	Basic knowledge of FTZ

2024 SYNERGY for Corporate Professionals

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Global Trade	GT500 - Global Trade - Roadmap	In this session, you will be introduced to the future of ONESOURCE Global Trade with a comprehensive overview of the committed product roadmap for 2025. As we delve into the details of the quarterly releases planned for the suite of solutions, special attention will be paid to the deployment phase of the three-year "Catalyst" program. This program is dedicated to enhancing system stability and scalability, along with user experience improvements, marking a significant stride towards the future of global trade compliance technology.	Upon completion of this session, participants will be able to: 1. Understand the detailed product roadmap for ONESOURCE Global Trade scheduled for 2025. 2. Gain insights into the objectives and advancements of the "Catalyst" program and its impact on system performance and user experience. 3. Prepare for the integration of upcoming enhancements into their current trade compliance processes. 4. Provide feedback and discuss how these developments can align with their organizational needs and goals.	Participants should have a working knowledge of ONESOURCE Global Trade solutions and an interest in upcoming technological advancements within the field of global trade compliance.
Global Trade	GT510 - Global Trade Challenges Unveiled: A Client Advisory Board Discussion	In this session, we will host a Client Advisory Board (CAB), inviting customers to engage in an open forum where global trade professionals can candidly discuss the challenges, problems, and opportunities they encounter. This live discussion will cover a spectrum of issues from the evolving complexity of government regulations to the practical challenges associated with service and product solutions, including those provided by Thomson Reuters. This is a unique opportunity for customers to voice their experiences, insights, and suggestions for improvement.	Upon completion of this session, participants will be able to: 1. Share and discuss common challenges faced in the field of global trade compliance. 2. Explore the impact of regulatory changes on trade practices and compliance. 3. Address specific issues related to the use of Thomson Reuters solutions in their trade compliance processes. 4. Collaborate with peers to identify potential opportunities for improvements in products and services.	Participants should have a working knowledge of global trade compliance and be current users of Thomson Reuters solutions or similar products, with a readiness to share their experiences and engage in collaborative problem-solving.
Global Trade	GT600 - From Compliance to Profit: Leveraging Trade Agreements and Zones for Success	In this session, you will learn the intricacies of maximizing your organization's financial performance through strategic global trade compliance. Our focus will be on optimizing trade lanes and taking full advantage of duty optimization programs like free trade agreements and foreign trade zones. Discover how compliance professionals can not only ensure adherence to regulations but also contribute to the bottom line by making informed and strategic decisions.	Upon completion of this session, participants will be able to: 1. Analyze and optimize trade lanes for improved efficiency and cost savings. 2. Navigate the complexities of duty optimization programs, including free trade agreements and foreign trade zones. 3. Implement strategies that align compliance with business objectives to enhance profitability. 5. Integrate best practices in trade compliance to support organizational growth and success.	Participants should have a working knowledge of the basics of global trade compliance and an understanding of how trade regulations can impact an organization's financial performance.

Section	Session Title	Session Description	Session Objectives	Prerequisites
Global Trade	GT610 - Navigating Global Trade with Technology: Insights from ONESOURCE Compliance Professionals	In this session, we will explore the dynamic world of global trade compliance through the lens of experienced professionals who leverage technology and analytics to drive success. Participants will gain insights into the practical applications of ONESOURCE Global Trade compliance software, as informed by a panel of seasoned compliance experts. Engage in a thought-provoking discussion to understand the challenges, opportunities, and best practices in harnessing technology for trade compliance.	Upon completion of this session, participants will be able to: 1. Identify key challenges and opportunities in global trade compliance. 2. Understand how technology and analytics can enhance trade compliance strategies. 3. Learn from real-world examples provided by compliance professionals on the effective use of ONESOURCE Global Trade software. 4. Develop insights into how to apply technological solutions to their own trade compliance processes.	Participants should have a working knowledge of global trade compliance principles and an interest in the application of technology within this field.
Global Trade	GT620 - Navigating the Future of Trade: Trends and Regulations in 2025 and Beyond	In this session, we will explore the dynamic landscape of global trade, focusing on market trends and regulatory changes that are expected to arise towards in 2025. We will delve into a comprehensive analysis, providing trade compliance professionals with valuable insights into how these developments could impact businesses. Through this session, you will learn to anticipate and navigate the complexities of future trade environments.	Upon completion of this session, participants will be able to: 1. Identify key market trends that are likely to influence global trade in the near future. 2. Understand the upcoming regulatory changes and their potential effects on international business operations. 3. Analyze the implications of these trends and regulations on trade compliance strategies. 4. Develop proactive approaches to mitigate risks and capitalize on new opportunities in the evolving trade landscape.	Participants should have a working knowledge of current trade compliance practices and basic principles of international trade and regulations.
Global Trade	GT630 - From Data to Strategy: Leveraging the 2024 Global Trade Survey for Compliance Success	In this session, we will dissect the findings of Thomson Reuters' annual survey report on the state of Global Trade in 2024, drawing from the experiences and insights of trade professionals themselves. We will discuss the challenges, opportunities, trends, and regulatory changes highlighted in the report, providing an in-depth understanding of the current trade climate. Through this session, participants will gain firsthand knowledge of how their peers are navigating the trade landscape and what this means for the future of trade compliance.	Upon completion of this session, participants will be able to: 1 . Summarize the key findings of the Thomson Reuters' 2024 Global Trade survey. 2. Evaluate the main challenges faced by trade professionals as reported in the survey. 3. Recognize the opportunities that have emerged in the global trade arena as identified by industry experts. 4. Apply the survey insights to enhance their own trade compliance frameworks and business strategies.	Participants should have a working knowledge of trade compliance and an interest in understanding the latest survey findings and their implications on global trade practices.

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Global Trade	GT640 - ESG Compliance in Global Trade: Technology and Best Practices for Risk Management	In this session, we will examine the critical role of Environmental, Social, and Governance (ESG) considerations in Global Trade such as sanctions, forced labor, and carbon tracking. We will explore how corporations can employ technology within their trade departments to minimize risks, avoid penalties, and protect their reputations. By highlighting best practices in supply chain management, participants will learn how to integrate ESG principles effectively to ensure compliance and promote sustainability.	Upon completion of this session, participants will be able to: 1. Explain the importance of ESG factors in the context of global trade and compliance. 2. Assess the risks associated with non-compliance to ESG standards in international trade. 3. Utilize technological solutions to monitor and manage ESG-related risks in supply chains. 4. Discuss strategies for leveraging ESG performance to improve corporate reputation and stakeholder relations.	Participants should have a working knowledge of trade compliance, as well as a basic understanding of ESG principles and their application in global trade.
Indirect Tax	Business Automation Meets Compliance: Mastering Continuous Transaction Controls	In this session, we will delve into the dynamic intersection of business automation and continuous transaction control (CTC) compliance. We'll explore how the convergence of these two domains is transforming the financial landscape, enabling businesses to streamline operations while adhering to evolving regulatory requirements. This insightful discussion will provide a comprehensive understanding of the synergies between automation strategies and compliance frameworks.	Session Objectives: 1) Identify the key components of business automation and continuous transaction control compliance. 2) Recognize the benefits of integrating CTC compliance within business automation processes. 3) Analyze the impact of automated compliance on operational efficiency and risk management.	Participants should have a working knowledge of e-invoicing regulations and business processes.
Indirect Tax	Case Study: APAC Lessons Learned	In this case study, we will highlight issues with integrating other 3rd party systems and provide insights into leading practice tax code, company and product configurations for the APAC market.	Upon successful completion of this course, the user should be able to; Identify common issues with other 3rd party systems integrating with the ERP. Identify how to optimize Tax Response Filters. Analyze leading practice approach for Product mappings, ERP Tax Codes and Company Configurations	
Indirect Tax	Digital Transformation and the Tax Department of the Future	Join us for a dynamic panel discussion featuring leaders in business, tax consultancy, and technology as they share their experiences in modernizing tax departments. This session will delve into how these experts have leveraged tax technology, automation, and digital transformation to not only meet compliance demands but also to strategically enhance their organizations' goals. Discover practical strategies for utilizing your existing resources to transform your tax function into a pivotal, strategic asset within your company.	Session objectives: 1) Identify current challenges and opportunities for tax departments in the context of compliance and strategic advisory. 2) Recognize real-world examples of how companies have successfully transitioned to modern tax departments using technology and automation. 3) Determine actionable strategies for leveraging existing resources and skillsets to meet today's compliance requirements while supporting long-term organizational goals. 4) Analyze the impact of digital transformation on tax functions and how to integrate it into your business processes effectively.	
Indirect Tax	From Cost-Center to Profit Center: How IT and Tax are Driving the C-Suite Agenda to Deliver Growth	C-Suite Executives are prioritizing digital transformations, improving efficiency/reducing costs, and increasing customer satisfaction as primary drivers to achieve revenue/profit growth in 2024 and beyond. In response, Tax departments ahead of the curve are evolving from traditional cost centers to profit centers by leveraging technology and various strategies to enhance their efficiency and value contribution.	Upon completion of this session, participants will be able to: 1) Identify C-Suite priorities and what's driving them. 2) Evaluate how can IT and Tax teams demonstrate a higher and broader impact to accelerate the C-suite agenda and receive proper funding and resources to do so. 3) Recognize how IT and Tax should align priorities to help accelerate organizational growth. 4) Identify how successful IT and Tax teams align their digital transformation strategy to have a higher and broader impact across the organization.	Participants should have a basic understanding of Indirect Tax processes and automation technology.

2024 SYNERGY for Corporate Professionals

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Indirect Tax	Future-Proofing Tax: Shaping ONESOURCE Indirect Tax Together	Join us for an interactive session dedicated to you, our valued users of ONESOURCE Indirect Tax. This is your platform to voice your experiences, insights, and visions. We are committed to tailoring our solution to meet the evolving demands of tax compliance and your business needs. In this collaborative environment, we will delve into what makes ONESOURCE Indirect Tax an essential tool for your operations and explore how your feedback can steer the future enhancements of our product. Whether it's about user experience, functionality, integration, or support, your input is invaluable in our journey to perfecting tax automation for businesses around the globe.	Session Objectives: 1) Gather firsthand user experiences and feedback on the current functionality of ONESOURCE Indirect Tax. 2) Identify key areas of improvement and desired features from a customer perspective. 3) Encourage an open dialogue between users and the product team to understand user needs and expectations. 4) Foster a collaborative community of ONESOURCE Indirect Tax users to share best practices and success stories.	Participants should be current users or implementors of ONESOURCE Indirect Tax.
Indirect Tax	Global E-Invoicing Trends: Preparing Tax Professionals for a Networked Future	In this session, we will explore the global e-invoicing and Continuous Transaction Controls (CTC) landscape, preparing tax professionals for the shifts in tax technology as we approach 2025 and beyond. Participants will learn about the international regulations that shape e-invoicing, the technological trends driving its evolution, and the practices that can be adopted to ensure compliance and efficiency within this dynamic global framework.	Upon completion of this session, participants will be able to: 1) Recognize and gain insights into the global e-invoicing CTC landscape and its future direction. 2) Analyze the diverse regulatory environments for e-invoicing across different regions. 3) Identify and leverage technological advancements that are shaping global e-invoicing and CTC practices. 4) Distinguish the new ways tax departments need to approach technology, data, and operations in a networked world. 5) Evaluate and prepare for the impact of global e-invoicing and CTC trends on tax operations and compliance.	Pre-requisites: Participants do not need prior e-invoicing expertise. Please come if you have an interest in understanding how global trends can impact your company and local practices.
Indirect Tax	IDT 730- EY: Panel discussion: Case study of tax transformation with a TR client - Tips and Tricks.	Journey through a comprehensive case study of tax transformation with a TR client. Gain insights from real-world examples on how to manage stakeholders, ensure compliance, integrate technology, and more. Learn practical tips and tricks on implementing successful tax transformation processes. Equip yourself with the skills and knowledge to navigate your own tax transformation initiatives in the TR sector.	Upon completion of this session, attendees will be able to recognize key updates and principles within their field, differentiate between various methods relevant to their practice, interpret theoretical concepts for application in practical scenarios, analyze complex data to support informed decision-making, and evaluate the impact of new procedures or technologies on their professional responsibilities.	
Indirect Tax	IDT710- KPMG:Worlwide waves: Riding the E-invoicing Tsunami	In this session we will explore the seismic shift transforming global commerce through e-invoicing. We will take a deep dive on how these requirements are reshaping business landscapes. Join us as we ride the crest of innovation, uncovering strategies to harness the power of this unstoppable force and propel your organization to new heights in the digital age.	Will add, waiting on re-write	
Indirect Tax	IDT720- Grant Thornton: Mastering Tax Determination: Best practices for implementing a centralized tax engine	Join our session to hear from panelists who have experience with many implementations of varying size and scope. We will highlight the key challenges faced by implementers that often cause issues including integration approach, configuration strategy and maintenance management.	Upon completion of this session, the attendee will be able to Recognize how to efficiently integrate a centralized tax engine with existing systems, ensuring smooth data flow and accurate tax calculations. Identify design principles for scalability, understanding how to build a tax engine that can handle increased transaction volumes and business growth. Analyze advanced features within Onesource Determination, empowering participants to leverage functionalities beyond basic configuration.	
Indirect Tax	IDT750- Crowe: Using AI, Alteryx, and Thomson Reuters Indirect Tax Compliance	By harnessing the power of AI tools, Alteryx, and Thomson Reuters Indirect Tax Compliance, we can significantly enhance the efficiency and effectiveness of our compliance processes.	Upon Successful completion of this course, the user should be able to: Recognize the fundamentals of AI and its applications in compliance processing. Identify the use of Alteryx for data analytics and process automation. Apply Thomson Reuters Indirect Tax Compliance tools for accurate and up-to-date regulatory compliance	

Section	Session Title	Session Description	Session Objectives	Prerequisites
Indirect Tax	IDT760- BDO: Consumer Use Tax Automation - Leading Practices and Common Pitfalls to Avoid	In this session, we will provide insights on leading practices and common pitfalls to avoid for companies to consider in automating their use tax processes	Upon successful completion of this course, the user should be able to; Identify the latest trends in Consumer's Use Tax automation. Recognize leading practices and identify common pitfalls to avoid as they relate to Use Tax automation. Evaluate various Use Tax automation case studies.	
Indirect Tax	KPMG: Bausch + Lomb Customer Case Study – Complex Global Supply Chain using ONESOURCE Indirect Tax Determination with SAP S/4HANA	Bausch + Lomb is continuing their global Financial Transformation project into the US and EU with SAP S/4HANA and ONESOURCE Indirect Tax Determination. We will review B+L's complex supply chain scenarios and demonstrate how ONESOURCE has added significant value to Bausch + Lomb in managing its indirect tax calculation and reporting requirements.	Upon completion of this session, participants will be able to: 1) Interpret complex supply chain scenarios and identify business tax requirements. 2) Apply business tax requirements to configuration in both ONESOURCE Indirect Tax Determination and GlobalNext. 3) Recognize how ONESOURCE has added significant value to Bausch + Lomb enabling the organization to keep up with ever-changing global legislative updates.	
Indirect Tax	Leading the Charge: The Role of US Tax Leadership in Global E-Invoicing Compliance	In this session, we will discuss the crucial role of US tax leadership in driving global e-invoicing compliance. As businesses expand and operate across international borders, tax leaders must navigate a complex web of regulations. We will examine how US tax professionals can proactively manage these challenges and why their involvement is key to successful global e-invoicing strategies.	Upon completion of this session, participants will be able to: 1) Recognize the importance of US tax leadership in global e-invoicing compliance. 2) Identify the complexities of international e-invoicing regulations and their impact on US businesses. 3) Determine a proactive approach for tax departments to influence and ensure e-invoicing compliance globally. 4) Recognize best practices for US tax leadership to collaborate with international counterparts effectively. 5) Analyze potential challenges and solutions in harmonizing e-invoicing systems across different jurisdictions.	Participants should have a basic understanding of e-invoicing processes and technology.
Indirect Tax	Revolutionizing speed and scale with ONESOURCE Indirect Tax Determination Cloud and Edge Computing	In this session, we will explore the transformative potential of edge computing for businesses with high transaction volumes, specifically focusing on the application of ONESOURCE Determination Anywhere to enhance indirect tax calculation efficiency and scalability. Attendees will gain insights into how leveraging Determination Anywhere's edge computing can drive faster processing times and support growth.	Upon completion of this session, participants will be able to: 1) Recognize and understand edge computing and its benefits for high-volume transaction environments. 2) Recognize the challenges associated with tax calculations in fast-paced business settings. 3) Identify how Determination Anywhere's edge computing can be integrated with solutions to optimize tax processes. 4) Determine strategies for implementing edge computing within their own organizations to improve efficiency and scalability.	Participants should have a working knowledge of basic cloud computing concepts and an understanding of their organization's transaction processing needs.
Indirect Tax	TIDT740- EY: the power or data: end to end indirect tax technology process.	The power or data: end to end indirect tax technology process.	Explore how leveraging data analytics and technology can optimize the end-to-end indirect tax process, from data collection to tax determination and reporting, to enhance efficiency, accuracy, and compliance to latest worldwide requirements. This objective focuses on harnessing the potential of data-driven insights and technological advancements to streamline indirect tax processes and drive organizational effectiveness.	

2024 SYNERGY for Corporate Professionals

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
N/A	Charting the Future: Generative AI and Tax & Accounting	According to the 2024 Generative Artificial Intelligence (AI) in Professional Services report, 60% of corporate tax professionals believe generative AI should be used for tax work and 49% stated they already use some version of generative AI tool or plan to in the near future. In this session we will explore the transformative potential of Generative AI in the realm of tax and accounting and delve into innovative applications, real-world use cases, and tangible benefits that Generative AI brings to indirect tax professionals. We'll cover insights into how Generative AI can modernize compliance, improve accuracy, and extract valuable insights from complex tax and financial data. Join us as we chart the course towards a more efficient, insightful, and sustainable future for the tax profession.	Upon completion of this session, participants will be able to: 1) Identify the role of Generative AI in the tax and accounting fields. 2) Recignize how AI-driven solutions can enhance compliance and accuracy in financial reporting. 3) Analyze real-world use cases of Generative AI in Indirect Tax. 4) Evaluate the benefits and potential challenges of integrating Generative AI into tax work. 5) Determine strategies for implementing AI tools to unlock insights from financial data.	Participants should have a basic understanding of Indirect Tax processes and automation technology.
N/A	Harnessing AI for Tax Efficiency: Product Classification and Exemption Management	In this session, we are set to uncover the practical applications of AI in the domain of Indirect Tax, with a particular focus on the tax classification of products and exemption certificate management. By harnessing the power of AI, businesses can not only streamline their operations allowing for more precise tax compliance and efficient tax management but also significantly reduce the risks and exposures associated with tax audits. Through real-life examples, we will demonstrate how AI can be effectively integrated into tax workflows, transforming the way companies approach tax classification of products and exemption certificate management. This session is designed to provide actionable insights that participants can apply to their own organizations, equipping them with the knowledge to drive transformation initiatives in their tax functions.	Upon completion of this session, participants will be able to: 1) Identify the practical uses of AI in enhancing indirect tax operations, particularly in the areas of product tax classification and exemption certificate management. 2) Apply AI-driven strategies to their tax functions for improved accuracy in tax compliance and efficient management. 3) Detemrine a more streamlined and risk-averse approach to tax operations. 4) Evaluate the capabilities of AI to reduce audit risks and exposures	Participants should have a working knowledge of indirect tax processes
N/A	Manufacturing Success: Trends, Opportunities, and Solutions for Tax Professionals in Manufacturing	Join us for an enlightening session tailored specifically for tax and accounting professionals operating within the multifaceted world of manufacturing. Tax and accounting professionals in manufacturing face a rapidly evolving landscape, influenced by factors such as regulatory changes, global supply chain dynamics, and advancements in technology. Explore the current trends driving transformation in manufacturing, from Industry 4.0 technologies to sustainability initiatives and international tax compliance. Industry experts will provide strategic perspectives on leveraging these trends to drive efficiency, mitigate risk, and capitalize on emerging opportunities. This thought leadership event offers a unique opportunity to stay ahead of industry trends, connect with industry peers, and explore the transformative potential of technology in manufacturing.	Upon completion of this session, participants will be able to: 1) Identify the latest trends and challenges in the manufacturing sector affecting tax and accounting practices. 2) Recognize the impact of regulatory changes and global supply chain dynamics on manufacturing businesses. 3) Apply strategic perspectives to leverage industry changes for business efficiency, risk mitigation, and opportunity capitalization. 4) Detemrine the transformative potential of technology and share best practices by engaging with industry experts and peers.	

2024 SYNERGY for Corporate Professionals

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
N/A	Navigating Change: Trends, Opportunities, and Solutions for Tax Professionals supporting Retail, CPG, DTC & Entertainment.	Embark on a journey of discovery in this session tailored to the unique needs of Tax and Accounting professionals operating within the dynamic landscape of Retail, CPG, DTC and Entertainment industries. From evolving regulatory landscapes to shifting consumer behaviors, Tax professionals supporting these industries face a myriad of challenges in today's fast-paced environment. Discover the current trends shaping the Retail, CPG, DTC and Entertainment tax and accounting landscapes, from omnichannel sales models to digital transformation initiatives. Expert speakers will provide strategic perspectives on harnessing these trends to drive business growth, enhance compliance, and optimize financial performance. This session offers a unique opportunity to stay abreast of industry trends, connect with fellow professionals, and explore the transformative potential of technology in shaping the future. Join us as we navigate the winds of change together and chart a course towards success in the in Retail, CPG, DTC and Entertainment tax and accounting landscapes.	Upon completion of this session, participants will be able to: 1) Identify the key trends and regulatory changes impacting tax operations, tax compliance, tax management, and accounting for companies in Retail, CPG, DTC and Entertainment industries. 2) Analyze tech-driven solutions to navigate the evolving tax and regulatory landscape for companies in Retail, CPG, DTC and Entertainment industries. 3) Apply digital transformation initiatives to enhance tax operations, tax compliance, tax management, and financial performance for Tax Professionals in Retail, CPG, DTC and Entertainment.	
N/A	POST ELECTION UPDATE: The Impact of changes in Administration/Congress to the Energy Industry (Credits, Incentives, Tariffs and Taxes)	In this session, our panel will discuss and analyze the potential impact to current, proposed, pending and prospective oil/gas/energy industry credits based on the outcome of the Presidential and Congressional elections, including potential taxes and tariffs that could impact major capital investment decisions over the next decade.	Upon completion of this session, participants will be able to: 1. Identify major tax credits, opportunities and issues stemming from the change, or lack of change, to the Executive and Legislative branch of government, especially with a split congress. 2. Analyze the current landscape of energy tax credits and related issues 3. Recognize current trends in capital investment and emerging technology in renewable energy by hearing from industry experts 4. Apply strategic insights from industry experts to improve capital investment decisions, technology deployments and further enhance future tax planning opportunities.	
N/A	Regulatory Resilience: Trends, Opportunities, and Solutions for Tax Professionals in Financial Services, Banking and Insurance	Tax and accounting professionals in the financial services, banking and insurance sector face unique challenges stemming from stringent compliance requirements, evolving regulatory landscapes, and heightened scrutiny. Further, they are being challenged to be more forward-thinking and to be a strategic partner to the business. This session is dedicated to unraveling the complexities of current trends, addressing prevalent challenges, and unveiling cutting-edge technology solutions reshaping tax and accounting practices in financial services, banking and insurance. During this session, experts will provide strategic perspectives on how the tax function can continue to drive operational efficiency, ensure regulatory compliance, and enhance client service delivery while balancing providing analysis that can make a substantial contribution to the business when their organization is launching new products, expanding into new geographies, considering M&A opportunities, or seeking strategic opportunities presented by new tax legislation. This session offers a unique opportunity to stay ahead of industry trends, connect with industry peers, and explore the transformative potential of technology in financial services, banking and insurance.	Upon completion of this session, participants will be able to: 1) Identify key regulatory changes and understand their impact on tax and accounting practices in regulated companies. 2) Evaluate the latest technology solutions designed to enhance efficiency and compliance for regulated companies. 3) Apply strategies to harness momentum from current trends and new technology to improve accuracy and operational excellence.	

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Product Training	Advantage Program Essentials: Unlocking Value for Your Organization	In this session, we will work with the intricacies of the Advantage Program, exploring how it can benefit organizations seeking to optimize their tax and compliance workflows. The session will cover the unique features, services, and support offered through the program. Attendees will learn how to leverage the Advantage Program to its fullest potential, ensuring they can take advantage of the resources and tools provided for enhanced operational efficiency.	Upon completion of this session, participants will be able to: Describe the components and benefits of the Advantage Program. Utilize the tools and resources provided by the Advantage Program to improve tax and compliance operations. Implement best practices in their use of the Advantage Program to maximize value. Identify opportunities within the program for cost savings and process optimization. Access and engage with the support and community aspects of the Advantage Program effectively.	
Product Training	Brazil Tax Reform - Determination and Tax Content Enhancements	In this session, we will address the recent Brazil Tax Reform and its implications for tax determination, focusing on the importance of Technology as an enabler for a smooth transition to the new tax system. You will learn about the changes introduced by the reform, how they affect tax determination processes, and the ways in which enhanced tax content can aid in navigating the new tax landscape. We will explore specific updates relevant to Brazil's tax environment and how to apply these within your determination software to maintain compliance.	Upon completion of this session, participants will be able to: Summarize the key aspects of the Brazil Tax Reform and their impact on tax determination. Utilize enhanced tax content to ensure accurate tax calculations in light of the reforms. Adapt tax determination strategies to align with the updated Brazilian tax regulations. Evaluate the benefits of using updated tax content in managing changes due to the reform. Implement best practices for staying compliant with the evolving Brazilian tax system.	Participants should have a working knowledge of tax determination practices and a basic familiarity with Brazilian tax legislation.

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Product Training	Determination Enterprise: Enhancements that Support End of Life of Original Determination	In this session, we will explore the enhancements in Determination Enterprise that have been developed to support the transition from the original determination system to its end of life. You will learn about the critical updates and new features that facilitate a smooth migration and enhance the functionality of tax determination processes. We will share insights into how these enhancements can optimize your tax operations and ensure a seamless continuation of services.	Upon completion of this session, participants will be able to: Describe the enhancements in Determination Enterprise that support system migration. Understand the timeline and key considerations for transitioning from the original determination system. Implement the new features of Determination Enterprise to maintain uninterrupted tax compliance. Plan and execute a migration strategy that minimizes impact on business operations. Leverage the latest capabilities of Determination Enterprise to improve tax process efficiency.	Participants should have a working knowledge of the original tax determination system and be familiar with the basic concepts of tax software migration and system end of life.
Product Training	Determination Import/Export Data using Configuration APIs	Determination Import/Export Data using Configuration APIs	Upon completion of this session, participants will be able to: Understand the role of Configuration APIs in tax determination systems. Import and export data effectively using Configuration APIs. Configure and set up tax determination systems with enhanced precision. Recognize the benefits of automating data transfer in tax systems. Apply practical knowledge to troubleshoot common issues with Configuration APIs.	Participants should have a working knowledge of tax determination systems and basic experience with software integration techniques, including the use of APIs.
Product Training	Determination: Energy and Oil and Gas Industry Specific Evolution	In this session, we will delve into the evolution of tax determination within the Energy and Oil and Gas industries, focusing on industry-specific developments and enhancements. You'll learn about the unique challenges faced by these sectors in tax compliance and how determination software has evolved to meet these needs. We will examine the latest features and functionalities tailored for the Energy and Oil and Gas industries, and how they can be leveraged to improve accuracy, efficiency, and compliance in a complex regulatory environment.	Upon completion of this session, participants will be able to: Understand the unique tax determination challenges in the Energy and Oil and Gas sectors. Identify the recent industry-specific enhancements in tax determination software. Apply the new features to resolve complex tax scenarios within the Energy and Oil and Gas industries. Develop strategies to use determination software for enhanced compliance and operational efficiency. Anticipate future trends and how they will impact tax determination in these industries.	Participants should have a working knowledge of tax determination principles and a general understanding of the Energy and Oil and Gas industry regulations and compliance requirements.

Section	Session Title	Session Description	Session Objectives	Prerequisites
Product Training	Efficient Tax Solutions: Getting the Most Out of ONESOURCE Determination Anywhere	In this session, we will dive deep into the capabilities and functionalities of ONESOURCE Determination Anywhere, focusing on how it can be leveraged to automate and streamline tax determination processes. This comprehensive session is designed to empower you with the knowledge and skills needed to efficiently use this powerful tax solution in a variety of business scenarios.	Upon completion of this session, participants will be able to: Understand the core features of ONESOURCE Determination Anywhere and how they benefit tax determination. Navigate the ONESOURCE Determination Anywhere interface with confidence. Set up and configure tax rules and rates to match specific business requirements. Integrate ONESOURCE Determination Anywhere with existing financial systems for seamless tax processing. Troubleshoot common issues and utilize support resources effectively.	
Product Training	End-to-End Automation for ONESOURCE Sales & Use Tax: levergaing APIs for seamless compliance	In this session you will learn how you can automate your entire sales and use tax compliance process to save time both onboarding and during the monthly compliance process. In this session, we will show how to automate key processes within your indirect tax team using ONESOURCE Events. We'll explore real-world scenarios where API integration has led to more efficient compliance operations. "	Upon completion of this session, participants will be able to: Understand the ONESOURCE Sales & Use Tax library of APIs and how they can streamline and automate your end-to-end processes Have an overview of upcoming roadmap for further API automation Equip you with the knowledge to take the next step to onboard to our API suite and maximise efficiencies in your business	Participants should have a working knowledge of sales and use tax software and familiarity with the basic principles and challenges of tax compliance.
Product Training	Global Regulatory Changes: Benefits of Utilizing Standard Tax Content in Determination	In this session, we will examine Global Regulatory Changes and the substantial benefits of utilizing standard tax content in tax determination systems. You'll learn about the dynamic nature of global tax regulations and how standard tax content can help maintain compliance amidst these changes. We will explore how ONESOURCE Determination and similar platforms use standardized tax content to simplify the complexities of multi-jurisdictional tax compliance and reduce risk.	Upon completion of this session, participants will be able to: Understand the impact of global regulatory changes on tax determination. Recognize the advantages of using standard tax content for staying compliant with various tax laws. Implement standard tax content in their tax determination processes to improve efficiency and accuracy. Navigate the challenges of tax compliance in a multi-jurisdictional landscape. Prepare for future regulatory changes by adopting standardized content in their tax systems.	Participants should have a working knowledge of tax determination solutions and an understanding of the complexities involved in global tax compliance.
Product Training	Indirect Tax Horizons	In this session, participants will acquire valuable knowledge about crucial industry trends encompassing AI technologies, emerging opportunities, and the strategic handling of indirect tax portfolios.	Upon completion of this session, attendees will be able to identify trends in the indirect tax market, recognize the evolution of the ONESOURCE Indirect Tax strategy, identify the AI strategies planned for all Indirect Tax products, and analyze which products best align with their requirements.	Participants should have a working knowledge of tax determination software and familiarity with the basic principles and challenges of tax compliance.

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Product Training	Keeping Up with Change: What's New in Indirect Tax Integrations	In this session, we will explore the latest updates and features in the world of Indirect Tax Integrations. You will discover the most recent advancements in tax technology solutions and how they can be applied to improve indirect tax management and compliance. We'll discuss the evolving landscape of tax regulations and the importance of staying agile with the help of cutting-edge integrations. This session is designed to keep you at the forefront of indirect tax processes and technology.	Upon completion of this session, participants will be able to: Identify recent changes and trends in indirect tax technology integrations. Understand the implications of new updates on tax compliance and reporting. Evaluate and select appropriate tax technology solutions based on the latest developments. Implement new features and integrations to enhance indirect tax workflows. Adapt to regulatory changes swiftly by leveraging updated tax integration tools.	Participants should have a working knowledge of indirect tax concepts and experience with tax integration tools in enterprise resource planning (ERP) systems.
Product Training	Navigating the Digital Transformation with end-to-end compliance using ONESOURCE Indirect Compliance and E-Invoicing	In this session, we will investigate the best practices for implementing ONESOURCE Indirect Tax Compliance and ONESOURCER E-invoicing solutions to achieve end-to-end tax management. The focus will be on integrating these systems into existing workflows to enhance the efficiency and accuracy compliance reporting, and electronic invoicing. Participants will learn about the critical features of ONESOURCE, strategies for successful implementation, and how to leverage technology to ensure compliance with evolving tax regulations.	Upon completion of this session, participants will be able to: Understand the core functionalities of ONESOURCE Indirect Tax Compliance and ONESOURCE E-invoicing solutions. Identify the steps necessary to integrate ONESOURCE solutions into an organization’s tax workflow. Recognize best practices for data management and system configuration to maximize tax compliance and efficiency. Anticipate potential obstacles during implementation and learn how to navigate them successfully. Evaluate the impact of e-invoicing on tax processes and ensure readiness for regulatory changes.	

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Product Training	Navigating the Transition: Migrating to Indirect Tax Cloud Solutions	In this session, we will delve into the process of migrating from legacy indirect tax systems to a modern Indirect Tax (IDT) Cloud solution. We'll cover the strategic planning, execution, and benefits of transitioning to a cloud-based tax system. This session aims to provide a roadmap for a smooth migration, addressing common challenges and best practices to ensure successful implementation and adoption of the IDT Cloud platform.	Upon completion of this session, participants will be able to: Articulate the advantages of migrating from legacy systems to an IDT Cloud solution. Plan and prepare for the migration process, including data management and system integration considerations. Execute the migration strategy with minimal disruption to business operations. Ensure data integrity and compliance throughout the transition to the cloud. Leverage the features and capabilities of the IDT Cloud to enhance tax management and reporting.	
Product Training	ONESOURCE E-Invoicing key insights and best practices	In this session, we will share an in-depth understanding of ONESOURCE Electronic Invoice (EI), the Thomson Reuters solution for managing electronic invoicing requirements across the globe. We will examine how ONESOURCE EI can help organizations ensure compliance with diverse e-invoicing regulations and streamline their invoicing processes. This session is tailored to equip participants with the insights needed to implement and utilize ONESOURCE EI effectively within their business operations.	Upon completion of this session, participants will be able to: Explain the importance of electronic invoicing and the role of ONESOURCE EI in meeting global compliance demands. Navigate through the ONESOURCE EI platform and utilize its features to create, send, and manage electronic invoices. Configure ONESOURCE EI to align with specific legal requirements of different countries. Integrate ONESOURCE EI with other financial and ERP systems to maintain a cohesive financial operation. Apply best practices for electronic invoice management and troubleshoot common challenges encountered in e-invoicing.	
Product Training	ONESOURCE Events: Streamlining Compliance Workflows through API Automation	An exciting new development that complements the comprehensive suite of APIs that have been added over the past year to the ONESOURCE VAT Compliance product offering. ONESOURCE Events allows users to subscribe to notification feeds for various key events in the application, which can be used to create custom workflows or initiate processes outside of the application that are key parts of the Compliance process. In this session, we will show how to automate key processes within your indrect tax team using ONESOURCE Events. We'll explore real-world scenarios where API integration has led to more efficient compliance operations.	Upon completion of this session, participants will be able to: Understand the fundamental concepts of APIs and their role in compliance automation. Identify the key compliance processes that can benefit from API integration. Learn how to map compliance requirements to API functionalities. Create an automated workflow for compliance process using ONESOURCE Events.	

Section	Session Title	Session Description	Session Objectives	Prerequisites
Product Training	ONESOURCE Indirect Compliance - VAT/GST: Global Compliance Automation Now and Next	In this session, we will focus on ONESOURCE Indirect Compliance for VAT/GST, emphasizing the current state of global compliance automation as well as looking ahead to future developments. You will gain an understanding of how ONESOURCE can automate VAT/GST compliance processes across various jurisdictions and what new features are on the horizon. We will discuss practical applications, share best practices for managing global compliance, and explore how automation can enhance accuracy and efficiency.	Upon completion of this session, participants will be able to: Explain the functionalities of ONESOURCE Indirect Compliance for VAT/GST. Assess the benefits of automating VAT/GST compliance with ONESOURCE. Implement global compliance strategies using ONESOURCE's automated systems. Identify upcoming enhancements to ONESOURCE and their potential impact on VAT/GST compliance. Prepare for future trends in global compliance automation and understand how to adapt to these changes.	Participants should have a working knowledge of VAT/GST compliance requirements and a basic understanding of compliance automation tools.
Product Training	Optimizing Tax Compliance: Embedded ONESOURCE in SAP DRC	In this session, we will work with Embedded ONESOURCE for Sales & Use Tax within SAP Document Compliance (SAP DRC). You will learn about the integration of this specialized tax solution into the SAP environment, which simplifies and automates tax compliance. We will delve into the specifics of how Embedded ONESOURCE enhances the functionality of SAP DRC, providing a detailed understanding of its application in real-world scenarios. Attendees will gain valuable insights into optimizing tax processes using this integrated solution.	Upon completion of this session, participants will be able to: Describe the features and benefits of Embedded ONESOURCE within SAP DRC. Navigate the integration points between SAP DRC and Embedded ONESOURCE. Configure and customize tax determination settings to meet specific business needs. Troubleshoot common issues that may arise during the use of Embedded ONESOURCE in SAP. Assess the impact of Embedded ONESOURCE on Sales & Use Tax compliance workflows.	
Product Training	Oracle & Microsoft Solutions Update: A Closer Look at New Enhancements and Integrations	In this session, we will take a deep dive into the recent enhancements and new integrations available for Oracle and Microsoft Solutions. You will learn about the critical updates that have been implemented, how these enhancements can optimize your Oracle and Microsoft environment, and the benefits they bring to your business processes. We will provide a thorough examination of the new integrations and their role in improving system efficiency and user experience. This session aims to equip you with the knowledge to fully leverage the latest Oracle and Microsoft Solutions advancements.	Upon completion of this session, participants will be able to: Describe the latest enhancements made to Oracle and Microsoft Solutions. Analyze how new integrations can streamline business operations within the Oracle and Microsoft ecosystem. Apply the enhancements to increase system performance and user satisfaction. Develop strategies for adopting new integrations into their existing Oracle and Microsoft infrastructure. Anticipate the effects of these enhancements on overall business process optimization.	Participants should have a working knowledge of Oracle and Microsoft Solutions, including its core functions and previous integration capabilities.

2024 SYNERGY for Corporate Professionals

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Product Training	Procurement and E-Commerce integrations: A Closer Look at New Enhancements and Integrations	In this session, we will take a deep dive into the recent enhancements and new integrations available for Procurement & E-Commerce Solutions. You will learn about the critical updates that have been implemented, how these enhancements can optimize your Procurement & E-Commerce environments, and the benefits they bring to your business processes. We will provide a thorough examination of the new integrations and their role in improving system efficiency and user experience. This session aims to equip you with the knowledge to fully leverage the latest Procurement & E-Commerce Solutions advancements.	Upon completion of this session, participants will be able to: Describe the latest enhancements made to Procurement & E-Commerce Solutions. Analyze how new integrations can streamline business operations within the Procurement & E-Commerce ecosystems. Apply the enhancements to increase system performance and user satisfaction. Develop strategies for adopting new integrations into their existing Procurement & E-Commerce infrastructures. Anticipate the effects of these enhancements on overall business process optimization.	Participants should have a working knowledge of Procurement & E-Commerce Solutions, including its core functions and previous integration capabilities.
Product Training	SAP Solutions Update: A Closer Look at New Enhancements and Integrations	In this session, we will take a deep dive into the recent enhancements and new integrations available for SAP Solutions. You will learn about the critical updates that have been implemented, how these enhancements can optimize your SAP environment, and the benefits they bring to your business processes. We will provide a thorough examination of the new integrations and their role in improving system efficiency and user experience. This session aims to equip you with the knowledge to fully leverage the latest SAP Solutions advancements.	Upon completion of this session, participants will be able to: Describe the latest enhancements made to SAP Solutions. Analyze how new integrations can streamline business operations within the SAP ecosystem. Apply the enhancements to increase system performance and user satisfaction. Develop strategies for adopting new integrations into their existing SAP infrastructure. Anticipate the effects of these enhancements on overall business process optimization.	Participants should have a working knowledge of SAP Solutions, including its core functions and previous integration capabilities.
Product Training	Seamless Connectivity: Using Connectors and API for VAT Compliance in ERP Systems	In this session, we will go through the SAP and Oracle connectors for ONESOURCE VAT Compliance and differentiate this with the use of API to automate VAT Compliance import process. We'll delve into how connectors can streamline the transfer of information to ensure that VAT-related data is accurately captured and reported.	Upon completion of this session, participants will be able to: Differentiate between API and the use of connectors for linking ERP systems to VAT compliance processes. Analyze the role of connectors in facilitating VAT compliance during the import process within an ERP system. Explain the concept and technical requirements of using connectors for direct integration with ERP systems in the context of VAT compliance.	

2024 SYNERGY for Corporate Professionals

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Product Training	What's new with Indirect Tax NextGen Reporting and Analytics	In this session, we will investigate the latest advancements in Indirect Tax NextGen Reporting and Analytics. You will learn about the new generation of reporting and analytical tools designed to enhance visibility and insights into indirect tax data. We will cover how these technologies can transform tax reporting processes, enable better decision-making, and support compliance with evolving regulations. This session is crafted to provide you with a thorough understanding of the capabilities and applications of NextGen tax reporting and analytics tools.	Upon completion of this session, participants will be able to: Identify the features and benefits of NextGen Reporting and Analytics for Indirect Tax. Understand the application of advanced analytics in tax data interpretation and compliance. Integrate new reporting tools to improve the accuracy and timeliness of tax reports. Utilize predictive analytics to anticipate and prepare for tax-related trends and changes. Leverage enhanced data visualization techniques to communicate tax information effectively.	Participants should have a working knowledge of indirect tax reporting requirements and a general familiarity with data analytics tools and concepts.
Product Training	What's New with ONESOURCE Determination	In this session, we will delve into the latest enhancements and capabilities of ONESOURCE Determination, a leading tax determination software. You'll learn about the new functionalities that have been introduced to improve accuracy and efficiency in tax determination processes. We will discuss how these updates can be utilized to keep pace with the ever-changing tax landscape and ensure compliance. The session is designed to provide a comprehensive overview of the new features and their practical applications in various business scenarios.	Upon completion of this session, participants will be able to: Outline the newest features and improvements in ONESOURCE Determination. Evaluate the impact of these updates on their current tax determination processes. Integrate the latest ONESOURCE Determination functionalities into their tax systems. Enhance decision-making with the aid of new data analytics and reporting features. Maintain compliance with confidence by leveraging real-time tax rate and rule updates.	Participants should have a working knowledge of tax determination software and familiarity with the basic principles and challenges of tax compliance.
Product Training	Whats new with ONESOURCE E-Invoicing	In this session, we will focus on ONESOURCE E-Invoicing, looking at all the exciting new developments in the product in the last year and how you can use ONESOURCE to comply with your e-invoicing mandates globally and streamline your processes.	Upon completion of this session, participants will be able to: Understand the latest developments in the ONESOURCE E-Invoicing solution and how they can use them within their business. Have an overview of exciting upcoming developments for ONESOURCE E-Invoicing roadmap.	Participants should have a working knowledge or interest in ONESOURCE E-Invoicing and familiarity with the basic principles and challenges of e-invoicing compliance.

Section	Session Title	Session Description	Session Objectives	Prerequisites
Product Training	Whats new with ONESOURCE Sales & Use Tax	In this session, you will learn about the intricacies of Sales and Use Tax Compliance and how to leverage new functionalities to streamline processes and ensure accuracy. We will share insights into the latest technological advances that aid in managing these taxes effectively, and how to integrate them within your current systems. This interactive session aims to enhance your understanding and provide practical solutions for complex tax compliance challenges.	Upon completion of this session, participants will be able to: Identify key components and challenges of Sales and Use Tax Compliance. Understand how new functionalities can improve tax compliance processes. Implement strategies to integrate technological solutions with existing tax systems. Apply best practices for maintaining compliance in a dynamic regulatory environment. Recognize the importance of staying updated with the latest tax laws and regulations.	Participants should have a working knowledge of sales and use tax software and familiarity with the basic principles and challenges of tax compliance.
Tax Information & Reporting	Becoming More Efficient by Utilizing APIs	In this session, we will explore the power of Application Programming Interfaces (APIs) and how they can help you streamline your workflows and increase productivity. We will discuss the different types of APIs available and provide examples of how each can be used to automate repetitive tasks and improve efficiency. Additionally, we will cover best practices for integrating APIs into your existing systems and provide tips for troubleshooting and optimizing your API usage.	Upon completion of this session, attendees will be able to identify the available APIs for Tax Information Reporting and their benefits.	
Tax Information & Reporting	Cryptocurrency Regulatory Update and Associated Information Withholding Reporting Implications	Over the last few years, there has been explosive growth in cryptocurrency but very little guidance from taxing authorities on accounting for cryptocurrency transactions. This session will cover the latest information regarding cryptocurrency and 1099 reporting. We will also discuss the essential considerations for generating and filing information returns.	Upon completion of this session, attendees will be able to recognize the latest information reporting requirements for cryptocurrency transactions.	
Tax Information & Reporting	Get Ahead of the Curve: Everything You Need to Know About State Tax Information Filing Obligations (Forms 1099 and equivalents)	This session will review state tax information reporting concepts, including the combined fed/state Form 1099 filing program. Key state tax information reporting obligations in jurisdictions that fall outside this program will be addressed.	Upon completion of this session, attendees will be able to identify tax information reporting concepts and new features in the combined fed/state form 1099 filing program, and important state tax information reporting obligations.	
Tax Information & Reporting	Information Reporting Hot Topics	This session will cover the latest developments surrounding Forms 1099 and 1042-S compliance obligations, IRS audit efforts, as well as providing an update on the Transmitter Control Codes (TCCs) for filing electronically through the FIRE system.	Upon completion of this session, attendees will be able to identify the latest regulatory changes to IRS forms 1099 and 1042-S for the tax processing year 2022.	
Tax Information & Reporting	Insights from our Valued Customers	This session will be lead by a Client Success Executive along with several existing clients. We will discuss IRS reporting pain points as well as how to make sure you are taking full advantage of all of the OTIR features.	Upon Completion of this session, attendees will have a firsthand accounts of how our products/services have impacted the businesses of these experienced users . Learn about best practices, and discover innovative ways to maximize the value of our offerings	
Tax Information & Reporting	Ledgible and ONESOURCE Tax Information Reporting Cryptocurrency Solution	This session will provide important information on how Ledigible will partner with Thomson Reuters for a Cryptocurrency reporting application.	Upon completion of this session, attendees will better understand the requirements for cryptocurrency reporting and how OTIR will be there to help.	

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Tax Information & Reporting	Most helpful OTIR features for year-end processing & Case Management Dashboard	This session will review frequently used and helpful OTIR features. We'll show you how to perform advance search, look for key information on print & filing batches, and recommended Views/Reports you need at year-end and other reports you may not know about!	Upon completion of this session, attendees will be able to navigate OTIR more efficiently and will learn new ways to report on their data.	
Tax Information & Reporting	ONESOURCE Tax Information Reporting Advisory Board Meeting (Open to Public)	This session is open to all attendees. The Advisory Board will review new product ideas, enhancements, and product roadmaps, as well as discuss any hot topics. All attendees are encouraged to attend.	Upon completion of tis session, attendees will better nderstand the challenges other clients are experiencing and be able to learn how to not experience the same challenges.	
Tax Information & Reporting	Protecting Your Tax Forms: Identifying/Avoiding Fraud and Understanding Gig Economy Rules	This session will cover two crucial aspects of tax compliance: avoiding tax information fraud and understanding the tax implications of the gig economy.	Upon completion of this session, attendees will be able to identify tax information reporting risks & fraud. Additionally, attendees will have a better understanding regarding the Gig Economy Rules.	
Tax Information & Reporting	Responding to IRS notices – types and best practices for responses (including reasonable cause).	In this session, we will explore the different types of notices the IRS may send, including audit notices, payment notices, and penalty notices. We will discuss the best practices for responding to each type of notice, including how to gather necessary documentation, how to address any discrepancies or errors, and how to appeal decisions. Additionally, we will cover the concept of reasonable cause and how it may be used to avoid penalties or interest. By the end of this session, participants will have a solid understanding of how to effectively and efficiently respond to IRS notices, and how to avoid common pitfalls that could lead to further complications.	Upon completion of this session, attendees will be able to recognize the different types of IRS notices and be better prepared for responding back to the IRS.	
Tax Information & Reporting	Understanding 1042 & 1042-S Electronic Filing.	In this session, we will explore the ins and outs of Forms 1042 and 1042-S, which are used to report and pay taxes on foreign source income. We will delve into the requirements for electronic filing, including deadlines, specifications, and penalties for non-compliance. Additionally, we will discuss the benefits of electronic filing, such as faster refunds and reduced errors.	Upon completion of this session, attendees will be able to better understand the electronic filing requirements for the 1042 and 1042-S fomrs.	
Tax Information & Reporting	What's New in ONESOURCE Tax Information Reporting: A Product Update	This session will cover updates to the ONESOURCE Tax Information Reporting application resulting from regulatory changes for the upcoming tax season and additional product updates and enhancements.	Upon completion of this session, attendees will be able to identify the regulatory changes being implemented into the system for the upcoming tax season and recognize the benefits of the new features that assist with form preparation and filing.	
Trust Tax	1099 Reporting in ONESOURCE Trust Tax	This session will provide a high-level view of 1099 reporting in ONESOURCE Trust Tax and will cover the latest changes that have been made to this process.	Upon completion of this session, attendees will be able to recognize the new functionality and navigation in ONESOURCE Trust Tax.	
Trust Tax	Charitable deductions - use of §642c	In this session, we will explore the provisions of Section 642(c) of the Internal Revenue Code, which pertains to charitable deductions. We will discuss the eligibility requirements for claiming charitable deductions, the types of organizations that qualify for deductible contributions, and the documentation required to support these contributions. Additionally, we will cover the limitations and phase-outs that may apply to charitable deductions, as well as the benefits of using §642c to maximize your charitable giving.	Upon completion of this session, attendees will be able to recognize various trust situs rules and the tax impact of residency changes for beneficiaries and trustees.	

Section	Session Title	Session Description	Session Objectives	Prerequisites
Trust Tax	Corporate Transparency Act 2024: Unraveling Beneficial Ownership Disclosure Rules	This session will provide important information regarding the Corporate Transparency Act (CTA), set to take effect in 2024, introduces sweeping changes to beneficial ownership reporting requirements for corporations, limited liability companies, and other similar entities operating in the United States.	Upon completion of this session, attendees will be more familiar with the Corporate Transparency ACT and equip attendees with the knowledge and strategies to navigate these new regulations effectively.	
Trust Tax	Foreign Trusts: Understanding the tax and reporting considerations	In today's global economy, trusts have increasing connections with foreign countries. This session will discuss how to determine if a trust is a foreign trust for US tax purposes, and how domestic and foreign trusts are treated under US tax law. We will also cover some special foreign-related US reporting requirements, including Forms 3520 and 3520-A.	Upon completion of this session, attendees will be able to gain insights into proper classification, calculation methods, and reporting requirements to ensure compliance and maximize tax efficiency.	
Trust Tax	Form 1041 Updates (Credit Forms, ESBT Processing, etc.)	This session will provide an overview of recent changes to Form 3800 and other credit forms supported by ONESOURCE Trust Tax including Form 1116. It will also discuss various ESBT enhancements as well as various changes planned for tax year 2024 processing.	Upon completion of this session, attendees will be able to identify important changes made to ONESOURCE Trust Tax for completion of various credit forms and ESBT accounts.	
Trust Tax	Form 1042 Processing From A to Z	In this comprehensive session, we will take a deep dive into the processing of Form 1042, which is used to report and pay taxes on foreign source income. We will cover everything from the basics of form preparation to advanced topics such as withholding, reporting, and compliance.	Upon completion of this session, attendees will be able to identify the new ONESOURCE Trust Tax features and evaluate the application to the law for producing, processing, filing, and reporting Form 1042-S returns.	
Trust Tax	Generation Skipping Transfer Tax - Application to trusts and filings	In this session, we will delve into the intricacies of the Generation Skipping Transfer Tax (GSTT), which is a tax imposed on transfers of wealth that skip one or more generations. We will discuss the application of the GSTT to trusts and filings, including the types of trusts that are subject to the tax, the tax rates and exemptions, and the reporting and payment requirements. Additionally, we will cover the implications of the GSTT on estate planning and wealth transfer strategies, as well as the potential penalties for non-compliance.	Upon completion of this session, attendees will be able to identify the different types of trusts that are subject to the GSTT and how to maintain compliance.	
Trust Tax	Grantor - Irrevocable, Revocable, Intentionally Defective, Qualified Personal Residence Trusts	This comprehensive session will explore the nuances of irrevocable, revocable, intentionally defective, and qualified personal residence trusts, providing invaluable insights into their unique tax implications and reporting requirements.	Upon completion of this session, attendees will be able to gain a deep understanding of grantor trust rules, income taxation, and strategies for effective trust planning and administration.	
Trust Tax	Implications of SECURE on Trusts (i.e., inherited IRAs)	This comprehensive session will decode the intricacies of this landmark legislation, providing invaluable insights into its provisions, implications, and strategies for optimal retirement readiness.	Upon completion of this session, attendees will be able to gain a deep understanding of the new rules governing retirement account contributions, distributions, and tax incentives. Explore the expanded opportunities for catch-up contributions, automatic enrollment, and enhanced retirement savings vehicles.	
Trust Tax	ONESOURCE Trust Tax Advanced Registers	In this session, we will explore the features and benefits of ONESOURCE Trust Tax Advanced Registers, a powerful tool for streamlining tax compliance and reporting. We will discuss the various register options available. We will also cover the benefits of using Advanced Registers, such as reduced errors and penalties, improved efficiency, and enhanced transparency.	Upon completion of this session, attendees will be able to identify the efficiencies and possible risk reduction benefits they can gain by using K-1 Analyzer in conjunction with ONESOURCE Trust Tax.	
Trust Tax	ONESOURCE Trust Tax Data Load Ins and Outs	This session will provide important information regarding data loading and messaging. We will run through the AutoLoad process and messaging, Cash Balancing, Record Types and Reversals/Stops.	Upon completion of this session, attendees will be able to better understand the AutoLoad process and become more efficient within the OTT application.	

2024 SYNERGY for Corporate Professionals

DRAFT SESSION IDEAS | SESSIONS ARE NOT FINAL AND WILL CHANGE

Section	Session Title	Session Description	Session Objectives	Prerequisites
Trust Tax	ONESOURCE Trust Tax Workflow Best Practices	This session will cover the ONESOURCE Trust Tax application Workflow best practices so you can make the best out of the application.	Upon completion of this session, attendees will be able to navigate through Workflow and become more efficient within the application.	
Trust Tax	Responding to IRS notices – types and best practices for responses (including reasonable cause).	This session will discuss receiving a notice from the IRS can be a daunting experience, but understanding the different types of notices and how to respond appropriately is crucial.	Upon completion of this session, attendees will have a better knowledge and best practices to navigate IRS notices effectively, including guidance on reasonable cause claims.	
Trust Tax	Special Needs Trusts: Understanding the different types of trusts and their tax treatment	This session will discuss the essential provisions of a valid special needs trust, and the key differences between first-party and third-party special needs trusts and their respective tax treatment. We will also cover the criteria that must be met for a trust to be taxed as a qualified disability trust for income tax purposes.	Upon completion of this session, attendees will have a better undstanding the different types of trusts and their tax treatment.	
Trust Tax	State Beneficiary Output: K-1s and Beneficiary Messages	This session will review state beneficiary computations and output for 1041 processed accounts. This includes state Schedule K-1s and beneficiary messages.	Upon completion of this session, attendees will be able to recognize how state beneficiary information is computed and when such information is included in the beneficiary section (to be provided to the beneficiary) of the print file.	
Trust Tax	Tax Policy, Proposals & Prospects: A Washington Update	This session will provide an update on the current tax legislative landscape in Washington, compare the tax policy platforms of Democrats and Republicans and examine what kinds of tax legislative changes may be possible in a divided government this year as well as will look ahead to tax policy decisions lawmakers will face in 2025.	Upon completion of this session, attendees will be able to identify the latest changes impacting the fiduciary tax industry.	
Trust Tax	The World of Gains: Capital, Ordinary, and other complex tax reporting items	This session delves into the nuances of capital gains, ordinary gains, and other intricate reporting items, equipping you with the knowledge to tackle even the most complex tax scenarios.	Upon completion of this session, attendees will be able to	
Trust Tax	What's New in ONESOURCE Trust Tax: A Product Update	This session will cover changes in the ONESOURCE Trust Tax application for the upcoming tax season resulting from regulatory changes, plus other product updates and enhancements.	Upon completion of this session, attendees will be able to identify important regulatory updates and highlights made to ONESOURCE Trust Tax to aid users in tax preparation.	