



The Thomson Reuters Institute

*presents*

## Generative AI and Emerging Technology Forum

*Discerning and Measuring the Value, Ethical Quandaries and Opportunities of Generative AI and Emerging Technology for Legal, Tax & Accounting and Corporate Professionals*

October 12, 2023

Roxy Hotel  
2 Avenue of the Americas  
New York, NY

Chair:

**Mike Abbott**, *Head of Thomson Reuters Institute*, Thomson Reuters

Program (all times local)

<b>8:30am – 9:30am</b>	<b>Registration and Networking Breakfast</b>
<b>9:30am – 9:45am</b>	<b>Welcome</b>
<b>9:45am – 10:45am</b>	<b>Discerning Fact from Science Fiction: What Does the Advent of Generative AI Hold for Professional Services?</b> The advent of generative AI and increasingly advanced machine learning capabilities offers tremendous opportunities and capabilities for legal, tax & accounting and corporate professionals. During this engaging discussion we will: <ul style="list-style-type: none"><li>• Briefly chart the recent history of AI applications within legal, corporate and tax &amp; accounting settings</li><li>• Identify generative AI's capabilities and impact for professional services</li><li>• Examine current applications of generative AI within legal, tax &amp; accounting and corporate settings</li><li>• Practical applications, achieving improved operating efficiency and cost savings benefits that can be realized through generative AI</li><li>• Risk analysis and navigating challenges</li></ul>

Moderator:

**Zach Warren**, *Technology and Innovation Insights Lead*, Thomson Reuters Institute

Panelists:

**Chris D'Ambola**, *Managing Director*, BDO USA

**Valerie McConnell**, *Attorney and Vice President*, Casetext

**Joshua Masia**, *Co-Founder and Chief Executive Officer*, DealBridge.ai

<b>10:45am – 11:00am</b>	<b>Break</b>
--------------------------	--------------

**11:00am – 11:45am**

**AI, Ethics and the Human Element: Elevating the Experience of Lawyers and Accountants through Alignment of AI Technology and Human Innovation**

While AI technology applications hold the potential to dramatically enhance and elevate the role of legal and accounting professionals, the technology is still in its infancy and does ultimately rely upon human input and guidance to direct its cognitive “thinking” and functioning. During this session, we will take a deep dive into:

- Forecasting current AI advances and innovations likely to become mainstream within the next five years
- Sincere understanding of how AI relies upon human guidance and input
- AI advances and innovations currently in development and which may become mainstream within the next five years, for white collar professionals
- How will AI impact direct interactions and communications between white collar professionals and their clients?

Moderator:

**Cynthia Cole, Partner, Baker & McKenzie LLP**

Panelists:

**Wendy Butler Curtis, Chief Innovation Officer, Orrick Herrington & Sutcliffe LLP**

**Dennis Garcia, Assistant General Counsel, Microsoft**

**Joe Habak, Managing Director, Andersen National Tax Technology & Automation (ANTTA) Leader, Andersen**

**11:45am – 12:45pm**

**Networking Luncheon**

**12:45pm – 1:30pm**

**Measured Leverage: Evaluating Generative AI Applications and Utilization within Professional Services**

In this engaging session, we'll take a close look at how to best leverage and apply generative AI, and other forms of AI and machine learning-based technologies within professional services. The session will delve into:

- Current generative AI applications within professional services
- Considering and weighing of where generative AI applications can be utilized
- Calculating ROI and measuring the financial efficacy versus the cost and investment of AI technology
- Understanding the vital role of Data Scientist as part of an integrated AI adoption strategy

Moderator:

**Avi Gesser, Partner & Co-Chair, Data Security & Security Group, Debevoise & Plimpton LLP**

Panelists:

**Bennett Borden, Partner and Chief Data Scientist, DLA Piper LLP**

**Peter Geovanes, Chief Innovation & AI Officer, McGuireWoods LLP**

**Arash Nourk, Director of AI Experience Design, Thomson Reuters Labs**

**Jeffrey Willinger, Digital Experience Director, Withum**

**1:30pm – 1:45pm**

**Break**

**1:45pm – 2:45pm**

**Keynote Presentation**

Join us as we welcome this year's keynote presenter who will offer critical insight on the development of emerging technologies and generative AI.

Presenter:

**Andrew Busch**, *Economist, Futurist, 1st Chief Market Intelligence Officer for U.S. Government*

**2:45pm – 3:00pm**

**Break**

**3:00pm – 3:45pm**

**Merging Talent & Tech: Synchronizing Human Capital Development and Emerging Technology Integration**

The continued maturation and evolution of technology, particularly AI and automated technologies, holds profound ramifications for legal, tax and corporate professionals. As AI and automated technologies become increasingly utilized, organizations must begin to take steps to ensure that there is synchronicity between their human capital (i.e. employees) and these emerging new technologies. During this engaging session, we'll explore how to effectively:

- Address implications, opportunities, disruption and risks posed by generative AI technology within professional services
- Align recruitment and talent management with adoption of emerging AI and automated technologies
- Managing training and development

Moderator:

**Hussein Issa**, *Associate Professor, Department of Accounting and Information Systems, Rutgers Business School*

Panelists:

**Juliet Aiken**, *Strategic Data Scientist, Volta*

**Natasha Allen**, *Partner, Foley & Lardner LLP*

**Ray Meiring**, *CEO, QorusDocs*

**3:45pm – 4:00pm**

**Closing Remarks & Conclusion of Conference**

**4:00pm – 5:00pm**

**Networking Reception**