

SYNERGY2022

for Corporate Legal, Tax, and Trade Professionals

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Code	Segment	Type	Title	Description	Date	Start Time	End Time
TR100	Tax & Trade	Thought Leadership	TR100 - KPMG Hosted Breakfast Panel - The Future of Professionals	<p>Now more than ever, professionals within the Legal, Tax and Trade industries are navigating a multitude of disruptive forces, from shifting global dynamics to the rise of technology and data to maximize efficiency, to changing workforce expectations. While embracing a new normal we'll hear how professionals can navigate today's ever-evolving regulatory landscape, alongside the rapid adoption of technology and sweeping changes in legislation and compliance, while focusing on achieving the right mix of seasoned, up-and-coming, and new talent to meet the rising challenges for their departments.</p> <p>Panelists: Steve Hasker, President and CEO, Thomson Reuters Brad Sprong, Lead Partner, Private Enterprise Tax, KPMG Mark Chapman, Former Chief Legal and Compliance Officer, Cisco</p> <p>Moderator: Melinda Chan, Head of Marketing, Corporates, Thomson Reuters</p>	11/14/22	7:45 AM	8:45 AM
CP620	Tax & Trade	Product Training	CP620 - Discover the Power of Checkpoint Edge	This session is recommended for anyone who has transitioned to Checkpoint Edge from Checkpoint Classic or another research platform or anyone who wants to learn about the exclusive benefits and features of using Checkpoint Edge. During this session, attendees will learn how to find answers to their tax questions faster than ever with Checkpoint Edge.	11/14/22	1:00 PM	1:55 PM
DI-DOM200	Tax & Trade	Product Training	DI-DOM200 - Clearing Diagnostics/Validation Errors	This session provides an overview of the enhancements to the Organizer diagnostics.	11/14/22	1:00 PM	1:55 PM
DP120	Tax & Trade	Product Training	DP120 - How to Unlock the 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.	11/14/22	1:00 PM	1:55 PM
DP500	Tax & Trade	Product Strategy	DP500 - Modern ONESOURCE Tax Provision Overview	Explore the future of Modern ONESOURCE Tax Provision using an API-based calculation engine and self-service reporting interface.	11/14/22	1:00 PM	1:55 PM
DT620	Tax & Trade	Thought Leadership	DT620 - Speed the Walk from GAAP to STAT to TAX	Is your walk from Reporting GAAP to local country GAAP arduous? Let ONESOURCE provide the needed visibility to speed the walk from GAAP to Stat and from Stat to Tax differences. Quickly track changes over time, use ONESOURCE Statutory Reporting to convert account-level data to the financial presentation line, and convert to English from a local language with one click.	11/14/22	1:00 PM	1:55 PM

GT600	Tax & Trade	Thought Leadership	GT600 - Building a Resilient Framework for UFLPA and the Forced Labor Regulatory Landscape	Numerous laws exist today that require importers to take various due diligence steps to address forced labor risks in their supply chain. The U.S. Uyghur Forced Labor Prevention Act (UFLPA), which includes a presumptive rebuttal clause, makes it all the more challenging for companies (and very costly if not compliant). Learn how the heightened attention on this issue coming from investors, customers, politicians, and enforcement agencies is raising the priority towards the top of the list with any company doing business in China, as well as other high-risk regions.	11/14/22	1:00 PM	1:55 PM
HQ120	Legal Tech	Product Training	HQ120 - Getting the Real Deal Out of AI in HighQ	Join us in reviewing HighQ's AI tool. Learn best practices for fine-tuning out-of-the-box clauses and training your own custom clauses. Discuss tips and tricks for utilizing the tool to its fullest potential to aid contract review and evaluate risk.	11/14/22	1:00 PM	1:55 PM
I110	Tax & Trade	Product Training	I110 - What's New with the ONESOURCE Determination	This session will review the enhancements to the ONESOURCE Determination, the indirect tax calculation engine, over the last year. Learn about the design concepts, functional changes, and the new indirect tax features on the ONESOURCE platform.	11/14/22	1:00 PM	1:55 PM
O120	Tax & Trade	Product Training	O120 - A Basic Guide to Platform Entities	This session will cover how to configure and administer legal entities at the Platform level and how to drive efficiency in the entity management, especially for clients who are using multiple ONESOURCE applications.	11/14/22	1:00 PM	1:55 PM
O740	Tax & Trade	Thought Leadership	O740 - EY: Intelligent Automation In The Tax Landscape	Automation will disrupt every organization. To remain competitive, enterprises must look toward intelligent automation. Join us to learn more about intelligent automation, EY's approach, discussion of use cases, and integration with ONESOURCE solutions.	11/14/22	1:00 PM	1:55 PM
TI500	Tax & Trade	Product Strategy	TI500 - 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.	11/14/22	1:00 PM	1:55 PM
TT120	Tax & Trade	Product Strategy	TT120 - 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.	11/14/22	1:00 PM	1:55 PM
CP600	Tax & Trade	Thought Leadership	CP600 - A Basic Guide to ESG (Environmental, Social and Governance) Reporting	Come learn about ESG, understand where practices and regulators stand, and recognize what disclosures may be required in the future. With multiple sources of evolving standards and practices, it is difficult to keep track of what is coming and prepare to disclose a story that truly reflects the company's journey while remaining compliant.	11/14/22	10:55 AM	11:50 AM
DI-DOM100	Tax & Trade	Product Strategy	DI-DOM100 - What's New in ONESOURCE Income Tax	This session provides an overview of the new features that will be released for clients for the 2022 form year.	11/14/22	10:55 AM	11:50 AM
DP100	Tax & Trade	Product Training	DP100 - ONESOURCE Tax Provision (version 2016) Basics	This session will orient attendees to ONESOURCE Tax Provision (version 2016) by covering the navigation paradigms, data review functions and drill-down capabilities, and data entry and transfer functionality.	11/14/22	10:55 AM	11:50 AM
GT300	Tax & Trade	Product Training	GT300 - Understanding the Advanced Denied Party Screening Engine	This session will provide a comprehensive overview of the Advanced Denied Party Screening Engine that drives the ONESOURCE DPS module. Explore the algorithm behind the screening and review tips and best practices for leveraging the advanced engine.	11/14/22	10:55 AM	11:50 AM

GT390	Tax & Trade	Product Training	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.)	11/14/22	10:55 AM	5:45 PM
HQ290	Legal Tech	Product Training	HQ290 - Legal Front Door: Managing Your Matters in HighQ	Learn best practices for managing complex projects and matters, assigning work and tasks, collaborating on documents and data, and providing complete transparency to those that need it.	11/14/22	10:55 AM	11:50 AM
I510	Tax & Trade	Product Strategy	I510 - Indirect Tax Horizons	This session will provide an overview of the key industry trends, new opportunities, and the strategy for indirect tax.	11/14/22	10:55 AM	11:50 AM
O110	Tax & Trade	Product Training	O110 - Streamline Your Tax Preparation Process with the New ONESOURCE DataFlow	In this session we will cover the new ONESOURCE DataFlow and show how the new technology can be leveraged for global data gathering and loaded into ONESOURCE products as well as how extractions can be used to gain insight into your data.	11/14/22	10:55 AM	11:50 AM
O510	Tax & Trade	Product Strategy	O510 - ONESOURCE Platform and Administration: What's Next?	Join us to understand the long-term vision of the ONESOURCE platform. This session will cover capabilities released throughout 2022 and how they are shaping the future strategy for the ONESOURCE platform.	11/14/22	10:55 AM	11:50 AM
O900	Tax & Trade	Thought Leadership	O900 - Baker Tilly and Legible IO: Cryptocurrency - Taxes and Technology	The presentation will cover the state of the cryptocurrency and blockchain technology landscape; basic tax consequences of transacting in cryptocurrency, including current IRS guidance and any legislative developments; and the types of tax technology available to assist taxpayers with reporting cryptocurrency transactions for tax purposes.	11/14/22	10:55 AM	11:50 AM
TI600	Tax & Trade	Thought Leadership	TI600 - Information Reporting Hot Topics	This session will cover the latest developments surrounding 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.	11/14/22	10:55 AM	11:50 AM
TT110	Tax & Trade	Thought Leadership	TT110 - Trust Tax: The Path Forward!	Hear from the President of the Trust Tax User Group and receive an important industry update from our keynote speaker.	11/14/22	10:55 AM	11:50 AM
CP640	Tax & Trade	Thought Leadership	CP640 - Using Hot Topics in Accounting and Financial Reporting to Harness the Power of Checkpoint Edge	In this session, we'll discuss recent hot topics in Accounting and Financial Reporting and show attendees how to find the latest updates within Checkpoint Edge, as well as answers to their accounting and financial reporting research questions faster than ever before.	11/14/22	2:20 PM	3:15 PM
DI-DOM210	Tax & Trade	Product Training	DI-DOM210 - Starting the New Year: Best Practices for Getting Ready	In this session, we will cover how to get started with a new year. Do you know how to prepare ONESOURCE Income Tax for processing? In this session, you will get a checklist of things you need to consider and guidance on the order in which you should proceed.	11/14/22	2:20 PM	3:15 PM
DI-INTL100	Tax & Trade	Product Strategy	DI-INTL100 - What's New in ONESOURCE Income Tax International	This session will explore what's new and what's planned for ONESOURCE Income Tax International.	11/14/22	2:20 PM	3:15 PM

DP130	Tax & Trade	Product Training	DP130 - Basic Guide to ONESOURCE Workpapers	This session will cover the Workpapers add-in ribbon and manager areas of the ONESOURCE platform. It will also cover loading book/tax adjustments, extracting data for calculations and pushing the calculated values back into data entry cells for circular calculations such as State NOL and VA utilization/generation.	11/14/22	2:20 PM	3:15 PM
GT310	Tax & Trade	Product Training	GT310 - Self-Help and Platform Tools: How to Leverage BPM Automation and Visibility to Increase Efficiency, Report Builder for Business Insights, and Navigate File Load Manager	Explore Self-Help tools such as File Load Manager designed to provide user independence related to data interfaces. Learn about Platform Tools, such as Business Process Management (BPM) and Report Builder that can provide process automation and visibility, as well as the ability to run business reporting and dive into data insights.	11/14/22	2:20 PM	3:15 PM
I210	Tax & Trade	Product Training	I210 - Global Indirect Tax: Regulatory Changes That Impact Your Business	An overview of the latest product changes, enhancements, and features, as well as an outlook on upcoming release items and new product offerings related to ERP and systems integrations.	11/14/22	2:20 PM	3:15 PM
LT010	Legal Tech	Thought Leadership	LT010 - Aligning the Legal Department with ESG and Other Purpose-Driven Initiatives	An overview of the latest product changes, enhancements, and features, as well as an outlook on upcoming release items and new product offerings related to ERP and systems integrations.	11/14/22	2:20 PM	3:15 PM
LT240	Legal Tech	Product Training	LT240 - Accelerate Legal Operations Successes: Tracker Optimizations and Spend Management	An overview of the latest product changes, enhancements, and features, as well as an outlook on upcoming release items and new product offerings related to ERP and systems integrations.	11/14/22	2:20 PM	3:15 PM
O130	Tax & Trade	Product Training	O130 - ONESOURCE Calendar: Gain Visibility and Control Over Key Deadlines	An overview of the latest product changes, enhancements, and features, as well as an outlook on upcoming release items and new product offerings related to ERP and systems integrations.	11/14/22	2:20 PM	3:15 PM
O150	Tax & Trade	Product Training	O150 - Introduction to Alteryx	An overview of the latest product changes, enhancements, and features, as well as an outlook on upcoming release items and new product offerings related to ERP and systems integrations.	11/14/22	2:20 PM	3:15 PM
O780	Tax & Trade	Thought Leadership	O780 - Crowe: Reimagine DataFlow Concepts with Crowe - Incorporate Dataflow Into the Tax Provision Process	An overview of the latest product changes, enhancements, and features, as well as an outlook on upcoming release items and new product offerings related to ERP and systems integrations.	11/14/22	2:20 PM	3:15 PM
TI450	Tax & Trade	Product Training	TI450 - Tax Year Preparations and Testing	An overview of the latest product changes, enhancements, and features, as well as an outlook on upcoming release items and new product offerings related to ERP and systems integrations.	11/14/22	2:20 PM	3:15 PM
TT420	Tax & Trade	Product Training	TT420 - Utilizing Trust Tax APIs to Improve Efficiencies in Your Data Processing	An overview of the latest product changes, enhancements, and features, as well as an outlook on upcoming release items and new product offerings related to ERP and systems integrations.	11/14/22	2:20 PM	3:15 PM
DI-DOM230	Tax & Trade	Product Training	DI-DOM230 - ONESOURCE Income Tax: Tips and Tricks	An overview of the latest product changes, enhancements, and features, as well as an outlook on upcoming release items and new product offerings related to ERP and systems integrations.	11/14/22	3:40 PM	4:35 PM
DI-INTL120	Tax & Trade	Product Training	DI-INTL120 - Introduction to Processing 5471s in ONESOURCE Income Tax International	An overview of the latest product changes, enhancements, and features, as well as an outlook on upcoming release items and new product offerings related to ERP and systems integrations.	11/14/22	3:40 PM	4:35 PM
DP700	Tax & Trade	Thought Leadership	DP700 - EY: Discover How ONESOURCE Tax Provision Redesign Enabled Workpaper and Reporting excellence	An overview of the latest product changes, enhancements, and features, as well as an outlook on upcoming release items and new product offerings related to ERP and systems integrations.	11/14/22	3:40 PM	4:35 PM

GT610	Tax & Trade	Thought Leadership	GT610 - Un-nesting the Complexities of Russian and Other Sanctions	An overview of the latest product changes, enhancements, and features, as well as an outlook on upcoming release items and new product offerings related to ERP and systems integrations.	11/14/22	3:40 PM	4:35 PM
HQ210	Legal Tech	Product Training	HQ210 - Automation and Matter Management	An overview of the latest product changes, enhancements, and features, as well as an outlook on upcoming release items and new product offerings related to ERP and systems integrations.	11/14/22	3:40 PM	4:35 PM
I150	Tax & Trade	Product Training	I150 - What's New with Indirect Tax Integrations	An overview of the latest product changes, enhancements, and features, as well as an outlook on upcoming release items and new product offerings related to ERP and systems integrations.	11/14/22	3:40 PM	4:35 PM
ID600	Tax & Trade	Thought Leadership	ID600 - Indirect Tax: Using Tax to Strategic Advantage	Today's tax leaders are being asked to proactively advise the business and incorporate tax into strategic decision-making functions. With access to company-wide data for sales and purchases globally, tax teams can have a material impact on how a company operates now and in the future. To contribute effectively, tax leaders need a turnkey compliance process and transparent and reliable tax data.	11/14/22	3:40 PM	4:35 PM
O140	Tax & Trade	Product Training	O140 - Introduction to ONESOURCE Workflow Manager - Workflow Manager, Global Tax Audit Manager, FileRoom	Join the Professional Services team for a look at our Workflow Manager, FileRoom, and Global Tax Audit Manager productivity solutions to learn about our approach to the due date and document management today, as well as our future strategy for organizing, automating, and driving your processes across ONESOURCE.	11/14/22	3:40 PM	4:35 PM
O210	Tax & Trade	Product Strategy	O210 - What's New and Coming Soon in ONESOURCE DataFlow	Learn first-hand from the Product team about the new ONESOURCE DataFlow and the upcoming functionalities. Determine how new technology will position your organization to improve efficiencies and increase the control and accuracy of your data collection process. You will also gain insight into the product roadmap.	11/14/22	3:40 PM	4:35 PM
O250	Tax & Trade	Product Training	O250 - Alteryx and Leveraging APIs	This course will cover how Alteryx can be used to extract and load data into ONESOURCE solutions using existing APIs between Alteryx and ONESOURCE solutions.	11/14/22	3:40 PM	4:35 PM
O730	Tax & Trade	Thought Leadership	O730 - Crowe and Worley: Executive Reporting and Analytics - Unleash the Power of Your Data	This session will review current and future tax technology applications to harvest direct tax data across platforms. Utilizing all available data to generate automated executive-level reporting and analytics that improve efficiency and drastically reduce risk.	11/14/22	3:40 PM	4:35 PM
TI460	Tax & Trade	Product Training	TI460 - Web APIs and Alteryx Made Easy!	This session will explain how Alteryx data management can complement the services provided by ONESOURCE Tax Information Reporting. This session will also cover what is included in the ONESOURCE Tax Information Reporting API suite and the benefits provided by APIs. Attendees will gain an understanding of how to utilize these services in their tax operations.	11/14/22	3:40 PM	4:35 PM
TT450	Tax & Trade	Product Training	TT450 - Form 1042-S Processing From A to Z	Learn the latest regulatory and system updates for Form 1042-S processing with ONESOURCE Trust Tax	11/14/22	3:40 PM	4:35 PM
TT680	Tax & Trade	Thought Leadership	TT680 - Trusts with S-Corporation Stock - Recent Changes to Fiduciary Tax Returns Filing Requirements	This session covers the tax implications of trusts owning s-corporation stock. The IRS now requires shareholders in most circumstances to file form 7203, S Corporation Shareholder Stock and Debt Basis Limitations, with their fiduciary tax returns.	11/14/22	3:40 PM	4:35 PM

DI-DOM240	Tax & Trade	Product Training	DI-DOM240 - Getting the Most From Common State	This session will cover best practices and tips for gaining the most out of common state. Attendees will understand how to benefit from these practices to speed up their state return preparation and review process.	11/14/22	5:00 PM	5:55 PM
DP160	Tax & Trade	Product Training	DP160 - A Complete Guide to ONESOURCE Global Access Manager	This session will cover the web-based ONESOURCE Global Access tax provision, as well as data gathering screens, available reports, sign-off sequence, questionnaires, and user setup including group functionality.	11/14/22	5:00 PM	5:55 PM
DP180	Tax & Trade	Product Training	DP180 - Deferred Tax Presentations and More!	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 much more.	11/14/22	5:00 PM	5:55 PM
GT320	Tax & Trade	Product Training	GT320 - Best Practices in Managing Free Trade Agreement Solicitations	This session will provide methods and practices to ensure a smooth Free Trade Agreement supplier solicitation campaign utilizing ONESOURCE Free Trade Agreement (FTA) module, including customer use-case examples.	11/14/22	5:00 PM	5:55 PM
I240	Tax & Trade	Product Training	I240 - Deep Dive Into ONESOURCE Determination Anywhere	This session will provide an overview of the Determination Anywhere solution for ONESOURCE Indirect Tax. We will cover the benefits of this solution, implementation details, and how Thomson Reuters is helping customers stay on the cutting edge.	11/14/22	5:00 PM	5:55 PM
ID610	Tax & Trade	Thought Leadership	ID610 - Superfund Excise Taxes: Planning a Long-Term Solution that Addresses Tax and Technology Challenges with Ease.	The impact of reinstated Superfund Excise Taxes is far and wide. Taxpayers now have a new volumetric-based tax compliance obligation and are facing both tax and technology challenges in complying with reporting obligations. Hear how companies are tackling these challenges, and the approach around interim versus long-term compliance, especially with rules, rates, and forms still being finalized, to guide taxpayers to successfully comply with these new taxes with a strategic view toward a permanent automated solution and boosting their Environmental, Sustainable, and Governance goals.	11/14/22	5:00 PM	5:55 PM
O300	Tax & Trade	Product Training	O300 - ONESOURCE Tax Provision and Alteryx	This session will cover ONESOURCE Tax Provision automation and analytics with Alteryx.	11/14/22	5:00 PM	5:55 PM
O720	Tax & Trade	Thought Leadership	O720 - EY: Building An Intelligent Finance and Tax Function: Dell's Tax Automation Journey with Intelligent Automation and Connected Tax Analytic Tools	EY and Dell share how together they transformed Dells' tax function via intelligent automation by deploying data automation and data analytic tools to improve the efficiency and accuracy of multiple tax functions. Learn how they created a strategic vision and a tax function transformation plan that would promote tax as a strategic partner within Dell.	11/14/22	5:00 PM	5:55 PM
TI440	Tax & Trade	Product Training	TI440 - User Administration - Managing User Access	This session will cover how to add, update, and delete user access. We'll cover tips and tricks to help you manage user access in the ONESOURCE Administration feature and the ONESOURCE Tax Information Security feature.	11/14/22	5:00 PM	5:55 PM
TT430	Tax & Trade	Product Training	TT430 - 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.	11/14/22	5:00 PM	5:55 PM
DI-DOM290	Tax & Trade	Product Training	DI-DOM290 - Setting Up the State Taxable Income Workpapers	This session will cover how to implement the state taxable income workpapers. Attendees will learn a simple process that will save them time when entering their state modifications and adjustments.	11/15/22	10:40 AM	11:35 AM

DI-DOM720	Tax & Trade	Thought Leadership	DI-DOM720 - KPMG: Leverage API's to Improve Income Tax Automation	Learn how KPMG are utilizing APIs available for ONESOURCE Income Tax to streamline tax compliance processes and how you can leverage APIs to drive automation at your company.	11/15/22	10:40 AM	11:35 AM
DI-INTL240	Tax & Trade	Product Training	DI-INTL240 - Frequently Asked Questions and Best Practices for ONESOURCE Income Tax International	Do you want to avoid the most common ONESOURCE Income Tax International module mistakes? Solutions to many of the most frequently asked questions from clients will be the focus of this session.	11/15/22	10:40 AM	11:35 AM
DP310	Tax & Trade	Product Training	DP310 - Advanced Reporting and Administration	IMPORTANT: This session will cover advanced reporting capabilities in ONESOURCE Tax Provision (version 2016) including Batch Reporting functionalities, 10K reporting, various reporting configuration options, reporting permissions, and more.	11/15/22	10:40 AM	11:35 AM
GT370	Tax & Trade	Product Training	GT370 - How to Leverage APIs for Streamlined Data Integrations and Benefits of SAP Connectors	This session will provide an overview of ONESOURCE Global Trade APIs and how they can create efficiencies and increase accuracy in data integrations. It will also focus on ONESOURCE SAP Connectors and explore the benefits of implementing connectors in place of custom integrations.	11/15/22	10:40 AM	11:35 AM
I720	Tax & Trade	Thought Leadership	I720 - Global Tax Management: Practical Strategies for Automating Indirect Tax	Learn best practices on reducing the strain of managing the corporate indirect tax function via automation and data manipulation tools. Data wrangling activities can be significantly reduced through the utilization of RPA and data manipulation tools.	11/15/22	10:40 AM	11:35 AM
ID630	Tax & Trade	Thought Leadership	ID630 - Forces Shaping US Sales and Use Tax Compliance	As US Federal, State, and local governments look to recover revenues lost during the height of the Covid-19 pandemic, companies can expect more scrutiny over their compliance obligations than ever before. Regulatory changes, as well as reporting methods, are being looked at to ensure companies are doing their part. In this session, we'll review evolving US regulations and reporting requirements and why it makes sense to deploy a tax engine and compliance technology in the transaction lifecycle to create capacity, auto-manage legislative changes, rate issues, and more.	11/15/22	10:40 AM	11:35 AM
O520	Tax & Trade	Product Strategy	O520 - A Vision For Tomorrow: Business Process Management and Automation	Join the product team to look at our vision for an integrated digital solution that streamlines your tax process and keeps everyone connected. We'll talk about how key events across ONESOURCE can be used to drive workflows, trigger notifications and gain real-time visibility into the status of strategic decisions and risk reduction	11/15/22	10:40 AM	11:35 AM
O750	Tax & Trade	Thought Leadership	O750 - BDO: Data and Process Automation Throughout the Tax Life Cycle	Regardless of size or industry, every tax department follows a common tax life cycle. In this course, BDO's Tax Performance Engineering group will share strategies to identify and implement data/process automation throughout the tax life cycle.	11/15/22	10:40 AM	11:35 AM
TI630	Tax & Trade	Thought Leadership	TI630 - 1099K, 1099 Misc, and 1099 NEC - Federal and State Implications	This session will highlight the latest updates around Form 1099-K, 1099-MISC, and 1099-NEC reporting and common issues to avoid. In addition, it's not just the IRS anymore – the session will also discuss associated state reporting requirements and how to comply.	11/15/22	10:40 AM	11:35 AM
TT460	Tax & Trade	Product Training	TT460 - ONESOURCE Trust Tax: Did You Know?	This session will review the lesser-known functions in ONESOURCE Trust Tax that you could be using to become more productive.	11/15/22	10:40 AM	11:35 AM

HQ260	Legal Tech	Product Training	HQ260 - Getting it Done Right: CLM Best Practices	HighQ experts provide insight into implementing a successful CLM. Hear best practices for requirements gathering to make data-driven decisions for years to come.	11/15/22	12:45 PM	1:40 PM
LT200	Legal Tech	Product Training	LT200 - Intro to Advanced Accruals Reporting	The Unbilled Amounts and Accruals Reports are no longer the only way to report on accrual data in Tracker. In the last several years Legal Tracker has added many fields to the Report Builder enabling you to create a unique report for your finance team. This session will demonstrate best practice fields to use to create your own custom accruals report.	11/15/22	12:45 PM	1:40 PM
DI-DOM370	Tax & Trade	Product Training	DI-DOM370 - State Combined/Consolidated Returns Best Practices	This session will demystify state combined/consolidated return preparation. The focus will be on best practices and tips for combined/consolidated returns.	11/15/22	2:10 PM	3:05 PM
DI-DOM710	Tax & Trade	Thought Leadership	DI-DOM710 - Crowe and Performance Food Group - Import Data in ONESOURCE Income Tax with Confidence	There are multiple ways to import or load data into ONESOURCE Income Tax. What are the best options for what you need to achieve? This session will address several import options to help users answer that question.	11/15/22	2:10 PM	3:05 PM
DI-INTL270	Tax & Trade	Product Training	DI-INTL270 - Processing GILTI Through ONEOURCE Income Tax	This session will cover how to process global intangible low-taxed income (GILTI) and how to populate Form 8992 through ONESOURCE Income Tax.	11/15/22	2:10 PM	3:05 PM
DP510	Tax & Trade	Product Strategy	DP510 - ONESOURCE Tax Provision Update	This session will cover new enhancements to v2016 OTP and proposed enhancements for 2023. For example, new GMT reporting, Common Entities, Common Trial Balance, and Journal Entry APIs.	11/15/22	2:10 PM	3:05 PM
GT380	Tax & Trade	Product Training	GT380 - Free Trade Agreement BOM Analysis Best Practices and Using What-If Analysis to Determine Next Steps in Free Trade Agreement BOM Qualification	This session will provide methods and practices to ensure a smooth Free Trade Agreement BOM analysis process utilizing ONESOURCE Free Trade Agreement (FTA) module, including customer use-case examples.	11/15/22	2:10 PM	3:05 PM
HQ310	Legal Tech	Product Strategy	HQ310 - "Where Is and What's In the Contract?" How CLM Solutions Help Legal Drive Business Value	Corporate legal departments are juggling increased demands in a complex business and regulatory environment. Technology should give you complete visibility over your business's contracts and the lifecycle of progressing a contract from idea to handing it over to the business to manage. And it should enable legal advisers and internal clients to collaborate easily and securely. In this session, we will show how you can automate end-to-end CLM processes, empower self-serve with document automation, as well as standardize and ensure control over contracts with simplified, custom data-driven approval processes.	11/15/22	2:10 PM	3:05 PM
I730	Tax & Trade	Thought Leadership	I730 - Grant Thornton: Accelerate the Growth of ONESOURCE Determination Using Intelligent RPA	Indirect tax engine implementation and maintenance have become more time-consuming, and resource-straining as tax requirements become more complex. This session will explain how technology can help bring ONESOURCE Determination life faster and make maintenance easier going forward.	11/15/22	2:10 PM	3:05 PM

LT050	Legal Tech	Thought Leadership	LT050 - Aligning Legal Operations with Stakeholders Across the Enterprise	One key to legal operations success is a close partnership with stakeholders across the enterprise. Hear how legal ops leaders have built successful relationships with stakeholders from procurement, finance, IT, and others to drive positive outcomes for the legal department.	11/15/22	2:10 PM	3:05 PM
O500	Tax & Trade	Product Strategy	O500 - What's New and Coming Soon In ONESOURCE Data Capabilities	Join the product team for a closer look into recent key developments, a preview of future enhancements, and our ongoing direction for data management in the ONESOURCE platform.	11/15/22	2:10 PM	3:05 PM
O830	Tax & Trade	Thought Leadership	O830 - Deckers Brands: Leveraging Tax Provision, Workpapers, and Data Wrangling to Transform the Tax Provision Process	The Decker journey to update its Tax Provision/Global Access Manager instances and leverage Workpaper/ Data Wrangling to further automate its provision process	11/15/22	2:10 PM	3:05 PM
TI470	Tax & Trade	Product Training	TI470 - The New Customer Center!	This session will cover how to navigate through the ONESOURCE Customer Center to find information on scheduled outages, system releases, eNewz reports, and more	11/15/22	2:10 PM	3:05 PM
TT670	Tax & Trade	Thought Leadership	TT670 - Partnership Reporting: Investor Funds, Trader Funds, Funds of Funds, and Other Reportable Items	This session will cover various tax issues for investors in partnerships. The course will also discuss the difference between investor funds and trader funds, as well as the tax treatment and special reporting for various items partnerships report to investors on Schedule K-1.	11/15/22	2:10 PM	3:05 PM
DI-DOM650	Tax & Trade	Product Strategy	DI-DOM650 - Grant Thornton: State Tax Law Update	Hear an industry expert present the latest developments in state tax legislation.	11/15/22	3:30 PM	4:25 PM
DI-INTL330	Tax & Trade	Product Training	DI-INTL330 - Advanced Guide: Foreign Entity Processing	Beyond the basics, this session will delve deeper into processing foreign returns and provide best practices and tips.	11/15/22	3:30 PM	4:25 PM
DT600	Tax & Trade	Thought Leadership	DT600 - Global Minimum Tax, Is Your Team Ready?	How will your organization prepare for Global Minimum Tax? Operational readiness and compliance requires years of planning to mitigate risks and we've got analysis and data management tools that can help. Join our experts to get up-to-date information on what to expect with Pillar 2 of GMT and get a preview of the solutions we have to help your organization get ready to meet the requirements of this challenging new regulation.	11/15/22	3:30 PM	4:25 PM
GT340	Tax & Trade	Product Training	GT340 - Classification Tips and Tricks: Get Ahead of Classification Changes with Tariff Changes Manager, Using Artificial Intelligence to Manage Your Classifications	In this product training session, learn the best ways to use ONESOURCE Global Classification (GC) to manage your classification data. We will review tools such as Tariff Changes Manager, HS Mapping, Smart HS, and ECN to help you get ahead and stay on top of classification changes.	11/15/22	3:30 PM	4:25 PM
I410	Tax & Trade	Product Training	I410 - Indirect Tax Integration Principles for Custom Connectors	An overview of ONESOURCE Indirect Tax APIs, information available, and best practices for constructing custom connectors.	11/15/22	3:30 PM	4:25 PM
I740	Tax & Trade	Thought Leadership	I740 - Sarus - What to Expect After Your ONESOURCE Determination Implementation Has Gone Live	In this session, the panel will cover key points related to post go-live of the newly implemented ONESOURCE Determination solution at Baker Hughes. Attendees will learn about the handling of day-to-day tax integration and configuration and highlight common issues that typically arise, such as why transactions may produce errors or fail. Some of these issues require specialized skills and experience to troubleshoot	11/15/22	3:30 PM	4:25 PM

ID650	Tax & Trade	Thought Leadership	ID650 - EY: Driving Value with Tax Efficient Procurement and ONESOURCE Determinations	Join EY to learn about Tax Efficient Procurement (TEP) and what tools/technology are available to automate the administration. Review how TEP fits into the Tax and supply chain roadmap and learn to identify use cases to drive value and minimize costs. Discuss strategy and how your company can benefit and enable using ONESOURCE suite of solutions.	11/15/22	3:30 PM	4:25 PM
LT070	Legal Tech	Thought Leadership	LT070 - Mastering Legal Operations and Contract Management	Contract lifecycle management can be daunting. From creating self-serve tools for business partners to utilizing sophisticated contract analytic tools to identifying post-signature obligations and risks. Understand how you can address each key component of the contracting process to identify where you can drive efficiencies and automate workflows.	11/15/22	3:30 PM	4:25 PM
LT180	Legal Tech	Product Training	LT180 - Timekeeper Rate Review: Company and Law Firm Best Practices	Timekeeper Rate Review is a powerful tool in Legal Tracker that allows rate review to be centralized, discounting structures to be consistent, and invoice approval to be increasingly efficient. This all begins with proper submissions by your Law Firms. This session will walk you through the Law Firm side of Tracker Rate Sheets (and more!), best practices for using that data, and recent trends from both sides.	11/15/22	3:30 PM	4:25 PM
O160	Tax & Trade	Product Training	O160 - Introduction to Data Hub	This session will provide an introduction to DataHub and how data can be loaded from the ERP, mapped into various formats within DataHub, and loaded into various ONESOURCE Solutions.	11/15/22	3:30 PM	4:25 PM
O620	Tax & Trade	Thought Leadership	O620 - Digital Innovation: Going from Concept to Code: See How Companies are Leveraging Digital Technologies to Drive Growth and Streamline Operations with Creativity and Speed	Get a deep dive into Launch Innovation, an AWS Slalom Launch Center innovation program, and see examples of innovative solutions and approaches. Learn how to take your innovative ideas, build them quickly, and drive business value.	11/15/22	3:30 PM	4:25 PM
O790	Tax & Trade	Thought Leadership	O790 - KPMG and IBM: Discover Strategies to Optimize ERP Systems Including Integration with ONESOURCE Tools	Source data remains one of the top pain points for tax professionals when they are preparing their tax provisions and tax returns. A substantial amount of the data needed is sourced from a company's ERP (G/L) system. Leaders from KPMG and IBM will discuss the various technologies and opportunities available to companies in properly tax sensitizing their ERP systems and automating/streamlining data between ERP systems and ONESOURCE tax software applications. This session will discuss "low code" and advanced technologies that companies use to efficiently facilitate and migrate data between ERP systems and tax software applications.	11/15/22	3:30 PM	4:25 PM
TT440	Tax & Trade	Product Training	TT440 - Federal and State E-File and E-Pay: A Review and What's New for Electronic Filing in OTT	This session will review the ONESOURCE Trust Tax process for state e-filing and e-payment, and discuss the latest changes to the process.	11/15/22	3:30 PM	4:25 PM
DI-DOM390	Tax & Trade	Product Training	DI-DOM390 - The Ultimate Guide to Import Any Organizer Field Using Data Connection	This session will cover how Data Connection can be used to speed up your return preparation and review process. Learn everything about using this tool to import and export data from the return.	11/15/22	4:50 PM	5:45 PM

DP710	Tax & Trade	Thought Leadership	DP710 - EY and Apollo Global Management: Using Tax Provision and Workpaper to Drive Provision Efficiency for a Complex Legal Structure	A case study to demonstrate how Apollo and EY redesigned the provision process by effectively leveraging tax provision to provide efficiency and transparency in provision calculation with a complex legal entity structure involving partnerships and corporations.	11/15/22	4:50 PM	5:45 PM
GT630	Tax & Trade	Thought Leadership	GT630 - Tips to Ensure A Smooth Global Trade Implementation	This session will cover tips and best practice recommendations to leverage while preparing for and executing the implementation of enterprise software for trade. With feedback from CIP experts, in tandem with experienced and tenured Professional Services implementation consult professionals, we will cover project preparation, what to expect during implementation, and how to best manage the project through fruition.	11/15/22	4:50 PM	5:45 PM
I710	Tax & Trade	Thought Leadership	I710 - Deloitte: Tax Authorities Are Going Digital - How to Turn Risks Into Opportunity	Trends in digital tax reporting increased transparency and tax controls, advanced analytics used by tax authorities – challenges that Tax departments are experiencing daily. We'll discuss how well an automated solution can support businesses to increase efficiency for VAT compliance and reporting.	11/15/22	4:50 PM	5:45 PM
I750	Tax & Trade	Thought Leadership	I750 KPMG: Panel Discussion: PayPal and Raytheon - Continuous Improvement Through Indirect Tax Automation	1750 KPMG: A panel discussion with PayPal and Raytheon Technologies to discuss benefits of OneSource to solve multiple challenges, and the constant evaluation of where to go next.	11/15/22	4:50 PM	5:45 PM
LT080	Legal Tech	Thought Leadership	LT080 - Building Your Technology Roadmap	Whether your legal department is still in growth mode or established, developing a technology roadmap is key to ensuring the legal department has the tools needed to be successful. Learn how to prioritize technology solutions and how to build a business case to ensure the evolution of the legal department.	11/15/22	4:50 PM	5:45 PM
O170	Tax & Trade	Product Training	O170 - Data Hub - Integration and Dashboarding Reporting	This session will highlight how DataHub can be integrated with ONESOURCE Products and leveraged to generate various Dashboard reports using data from various ONESOURCE products.	11/15/22	4:50 PM	5:45 PM
O800	Tax & Trade	Thought Leadership	O800 - Grant Thornton: Information Overload? Get It Under Control with a Data Strategy and ONESOURCE	Tax data is increasingly complex and growing in volume. This session will explore how ONESOURCE promotes an effective data strategy that enables automation and efficiency while assisting decision-making. We will cover what constitutes an effective data strategy and explore ONESOURCE use cases.	11/15/22	4:50 PM	5:45 PM
TT480	Tax & Trade	Product Training	TT480 - Using K-1 Analyzer and Integrating with ONESOURCE Trust Tax	This session will review how to use K-1 Analyzer to manage partnership Schedule K-1s and improve efficiency with the integration into ONESOURCE Trust Tax.	11/15/22	4:50 PM	5:45 PM
TT620	Tax & Trade	Thought Leadership	TT620 - NRA/FATCA Withholding for 1042-S - Practical Application to Trust Companies	This session will cover the latest regulatory updates to NRA/FATCA and associated withholding for form 1042-S, with an emphasis on reporting for trust companies.	11/15/22	4:50 PM	5:45 PM
CP630	Tax & Trade	Product Training	CP630 - Getting the Most Out of Your Tax Research on Checkpoint Edge	In this session, attendees will learn how to use Checkpoint Edge to find answers to their tax questions faster than ever before. Attendees will discover how to use predictive technology and concept markers to improve the quality and precision of their queries, even when they aren't sure what keywords to use or what related topics they might need to consider. Note: This class is designed for Checkpoint Edge customers only and will not feature the Checkpoint Classic platform.	11/15/22	8:00 AM	8:55 AM

DI-DOM250	Tax & Trade	Product Training	DI-DOM250 - Introduction to 1065 and State A&A for 1065 Returns	This course will cover hot topics around 1065's and the State A&A for 1065 Returns.	11/15/22	8:00 AM	8:55 AM
DI-INTL130	Tax & Trade	Product Training	DI-INTL130 - Reconciling Transfer to Forms 5471, 8865, and 8858	This session will cover changes to the tax return forms over the past year. Attendees will learn how the ONESOURCE Income Tax International module constructs information for transfer to various foreign form schedules.	11/15/22	8:00 AM	8:55 AM
DP230	Tax & Trade	Product Training	DP230 - Payable and Journal Entry Functionality and Reporting	This session will cover how to format payable column headers, and 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.	11/15/22	8:00 AM	8:55 AM
GT330	Tax & Trade	Product Training	GT330 - Leveraging PGA Management for Smoother Importing	This product training session will focus on tools within the ONESOURCE platform that support the assignment and maintenance of PGA data. Explore the PGA Management options within the ONESOURCE Global Classification module and how Global Trade Content can help drive PGA decisions.	11/15/22	8:00 AM	8:55 AM
HQ250	Legal Tech	Product Training	HQ250 - Expanding and Optimizing HighQ: A Chat with Five Below and Thomson Reuters	Learn how Five Below, an American retail chain, uses HighQ to effectively and efficiently manage legal matters, contracts, and a real estate portfolio. Hear about what made them successful, what they would have done differently, and how they use core HighQ functionality, to stay current in the dynamic Legal Ops space.	11/15/22	8:00 AM	8:55 AM
I250	Tax & Trade	Product Training	I250 - IDT Data Management - Maximizing Your Transaction Data	Discussion of Indirect Tax calculation data and how it can be leveraged for reconciliation, reporting, and analysis. This session will cover how to extract calculation data from ONESOURCE Reports and Analytics, the tools that can help transform the data, and how to optimize data for compliance.	11/15/22	8:00 AM	8:55 AM
I700	Tax & Trade	Thought Leadership	I700 - BDO: A Strategic Blueprint to Build A Successful Implementation Project Across Your Business While Aligning With Company Goals	Running a successful implementation project can mean so much more than simply implementing and configuring your tax software application. It can start with building support internally, both within the tax function and across the organization, for your project. Is the project a stand-alone tax project? Or is it part of a business-wide effort to adopt best practices? Either way, the tax function should aim to have a "seat at the table" and ensure that necessary tax drivers for determination are available and that all compliance needs can be met.	11/15/22	8:00 AM	8:55 AM
LT030	Legal Tech	Thought Leadership	LT030 - How to Unlock Meaningful Metrics	Going beyond basic legal department metrics can be daunting. Hear how others have evolved their metrics and reporting to influence the C-suite, law firm partners, and business partners to elevate the legal department as a data-driven and value-driving business unit.	11/15/22	8:00 AM	8:55 AM
O700	Tax & Trade	Thought Leadership	O700 - KPMG: Alteryx and Tax - Federal Income Tax Alteryx Use Cases	Discuss how users can use Alteryx for their direct tax front-end and back-end processes	11/15/22	8:00 AM	8:55 AM

O710	Tax & Trade	Thought Leadership	O710 - EY: Automation Solutions and Integration with ONESOURCE Products	Join EY to better understand the various data automation and analytic tools available - including which tools are better suited for specific use cases and which tools to use for everyday activities. EY will share examples of data analytics and integration use cases in the tax function and highlight how to optimize these tools to get the most out of your ONESOURCE solutions (Tax Provision, Income Tax, Data Query, Data Flow, Data Hub and BEPS Action Manager, Determination, and Indirect Tax Compliance).	11/15/22	8:00 AM	8:55 AM
TI610	Tax & Trade	Thought Leadership	TI610 - Crypto 101 and the 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.	11/15/22	8:00 AM	8:55 AM
TT410	Tax & Trade	Product Training	TT410 - 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.	11/15/22	8:00 AM	8:55 AM
TT640	Tax & Trade	Thought Leadership	TT640 - ARE YOU SECURE? Everything You Need to Know About the SECURE Act and Other IRA Challenges	This session covers recent updates to the SECURE ("Setting Every Community Up for Retirement Enhancement") Act and how these changes affect IRAs, particularly IRAs where trust is a named beneficiary. The first SECURE bill passed in 2019, but "SECURE 2.0" bill has passed in the House and is moving through the Senate.	11/15/22	8:00 AM	8:55 AM
DI-DOM260	Tax & Trade	Product Training	DI-DOM260 - State Apportionment Using Alteryx	This course will cover how Alteryx workflows can be leveraged to automate State Apportionment data loading and calculations.	11/15/22	9:15 AM	10:10 AM
DI-INTL140	Tax & Trade	Product Training	DI-INTL140 - Reconciling Transfer to Form 1118	This session will cover changes in the tax return forms over the past year. Attendees will learn how the ONESOURCE Income Tax International module constructs information for transfer to various schedules of Form 1118.	11/15/22	9:15 AM	10:10 AM
DP250	Tax & Trade	Product Training	DP250 - Topics Led by the ONESOURCE Tax Provision Steering Committee	Learn about the ONESOURCE Tax Provision steering committee's purpose and objectives, as well as how to utilize the committee to have your voice heard in the development of the ONESOURCE Tax Provision.	11/15/22	9:15 AM	10:10 AM
GT620	Tax & Trade	Thought Leadership	GT620 - The Shape of Things to Come: Global Trade in 2023	Sanctions, trade wars, trade agreements, supply chain delays, and more. Our presenters give their predictions of what is to come in 2023; the headwinds and tailwinds, the risks and the opportunities.	11/15/22	9:15 AM	10:10 AM
I310	Tax & Trade	Product Training	I310 - Utilizing APIs to Automate Your ONESOURCE Indirect Compliance - Sales and Use Tax Process	This course demonstrates the use of APIs to interact with the ONESOURCE Sales and Use Tax Compliance application and how automation could reduce monthly tax preparation time.	11/15/22	9:15 AM	10:10 AM
I490	Tax & Trade	Thought Leadership	I490 - ONESOURCE Indirect Tax with Oracle ERP: A Global Implementation Perspective Panel Discussion with Grant Thornton	A panel discussion with Grant Thornton on Oracle ERP and ONESOURCE Enterprise Cloud from a global implementation perspective. This will be a moderated session led by TR and Grant Thornton panelists will share their perspectives on various implementation experiences that have transformed businesses from a tax automation standpoint. Success factors along with risk evaluation and ROI will be discussed in this session for awareness and education.	11/15/22	9:15 AM	10:10 AM

ID620	Tax & Trade	Thought Leadership	ID620 - Global Tax Authorities and Indirect Taxes: Where Are They Headed and What You Should Know	Year after year, the biggest concerns for Indirect Tax teams are regulatory changes and remaining compliant everywhere they conduct business. The mounting pressure that globally impacts indirect Tax teams continues to be a burden that, if not addressed adequately, could result in fines, penalties, or worse, having their right to do business revoked. In this session, we'll explore some of the anticipated global regulatory changes and methods in which taxing authorities require data and when.	11/15/22	9:15 AM	10:10 AM
LT160	Legal Tech	Product Training	LT160 - Reporting Workshop Preview	Legal Tracker reporting provides the information necessary to measure KPIs and make smart, data driven decisions. This session will discuss basic reporting principles and advanced concepts. This is a preview of the Reporting Workshop that is launching in 2023.	11/15/22	9:15 AM	10:10 AM
O190	Tax & Trade	Product Training	O190 - Introduction to ONESOURCE Statutory Reporting	This session will provide an exploration of the benefits that businesses can achieve by deploying ONESOURCE Statutory Reporting into their statutory reporting process.	11/15/22	9:15 AM	10:10 AM
O770	Tax & Trade	Thought Leadership	O770 - KPMG: A Client Roundtable on Automating the Tax Provision and Compliance Processes with ONESOURCE and Alteryx	Discover how KPMG's Tax Transformation team works with clients to help them think holistically about their global tax technology environment by designing and implementing Alteryx to support the direct income tax process to achieve enhanced tax reporting, processes, and data management. Hear from tax department leaders at BMW, Johnson & Johnson, FlightCentre, Skanska, Peleton, and Incomm on the challenges they were facing and how KPMG transformed the end-to-end tax data collection and management process by introducing improved automation tools and processes to improve controls and reduce risk in an evolving environment.	11/15/22	9:15 AM	10:10 AM
TI620	Tax & Trade	Thought Leadership	TI620 - AP Session Update	This session will provide important information reporting updates applicable to the accounts payable organizations. This session will also help organizations understand important filing obligations and other issues to consider when preparing information returns.	11/15/22	9:15 AM	10:10 AM
TT610	Tax & Trade	Thought Leadership	TT610 - Navigating Your Way Through Hard-To-Value Assets	Unique and hard-to-value assets held in fiduciary accounts have been an increased focus for examiners at national and state levels ever since the OCC created the Comptroller's handbook for this asset class in August 2012. In 2015, the IRS enacted new tax reporting rules that added further reporting requirements for these assets held in IRA accounts (Forms 5498 and 1099R). Although it can be challenging to stay on top of all the changing requirements, join us for this briefing focusing on closely held assets.	11/15/22	9:15 AM	10:10 AM
GT640	Tax & Trade	Thought Leadership	GT640 - Benchmark Your Department Against Your Peers: State of Global Trade Report Readout	How does your global trade practice area measure up? Join us to benchmark your global trade key metrics against the results of this year's Thomson Reuter's Institute State of Global Trade Report readout.	11/16/22	12:40 PM	1:35 PM
O610	Tax & Trade	Thought Leadership	O610 - Why Data Management Is The Key to Tax Function Automation	The journey to a proactive tax function starts with data management. Powerful trends have demanded transformation within tax and this session covers the critical topics executives must understand to negotiate this dynamic landscape.	11/16/22	12:40 PM	1:35 PM

TI640	Tax & Trade	Thought Leadership	TI640 - Gig/Share Economy Update	The gig/share economy continues to grow as people look to on-demand work to offset inflation. This session will provide an update on the gig/share economy as it relates to tax information reporting requirements for gig/share workers and companies.	11/16/22	12:40 PM	1:35 PM
TT660	Tax & Trade	Thought Leadership	TT660 - Trust Situs: Challenges Due to Changing Locations of Trustees and Beneficiaries	In 2022, did you work from home, change state residency, or move your trustee location? This session will cover the various trust situs rules, as well as what happens if beneficiaries or trustees move, and how to deal with state authorities who want to keep a share of the tax revenue.	11/16/22	12:40 PM	1:35 PM
DT610	Tax & Trade	Thought Leadership	DT610 - Take the Sting Out of State and Local Regulations with Our SALT Update	Come get an update on state and local tax regulations that are widely impacting businesses in the U.S.	11/16/22	2:00 PM	2:55 PM
GT360	Tax & Trade	Product Training	GT360 - Master Data Management Design Best Practices	This product training session will cover master data management best practices and the importance of having a solid master data governance process. Explore how master data is the foundation for transactional business processes and reporting that supports strategic business decisions.	11/16/22	2:00 PM	2:55 PM
TT470	Tax & Trade	Product Training	TT470 - Estimate Processing in ONESOURCE Trust Tax	Learn the latest regulatory and system updates for federal and state fiduciary estimate processing with ONESOURCE Trust Tax	11/16/22	2:00 PM	2:55 PM
DI-INTL700	Tax & Trade	Thought Leadership	DI-INTL700 - Deloitte: Process and Technology Considerations for Pillar Two	This session will focus on the importance of Pillar Two, the impact on companies, and how technology can be used to address clients' needs.	11/16/22	8:00 AM	8:55 AM
DP720	Tax & Trade	Thought Leadership	DP720 - RSM: Business Combinations: An Interactive Tax Provision Case Study	During this session, attendees will learn about the updates to accounting standards for business combinations and their applicability to ASC740. The session will include RSM Tax M&A and ASC740 professionals to navigate a series of mini-case studies that exemplify the interactions between M&A and accounting teams, applying business combination rules to tax provisions, and executing expected results with ONESOURCE Tax Provision..	11/16/22	8:00 AM	8:55 AM
GT500	Tax & Trade	Product Strategy	GT500 - ONESOURCE Global Trade roadmap	Learn about the exciting updates and enhancements that ONESOURCE Global Trade has on its product roadmap.	11/16/22	8:00 AM	8:55 AM
HQ280	Legal Tech	Product Training	HQ280 - Get the Most Out of Your Data in HighQ with iSheets and Visualizations	Learn how to create a visual story with your data. Let experts walk you through resolving gaps in your data and updating configurations to help you get the most out of reporting. Come with your iSheet & visualization questions to get answers from our experts while engaging in conversation with other clients about best practices, use cases, and troubleshooting.	11/16/22	8:00 AM	8:55 AM
LT290	Legal Tech	Product Training	LT290 - Legal Tracker Advanced: Innovation in Rate Management	Spend management covers the basics of onboarding, paying firms, and the advanced use cases of controlling and predicting costs. Outcomes, diversity and inclusion, quality of communication, and trust also play a significant role in work allocation and increasing business. This session will review best practices for comparing data with peers via Legal Tracker Advanced. It will also provide insight into what's next, billing guideline enforcement and how to start organizing data for the future.	11/16/22	8:00 AM	8:55 AM

O180	Tax & Trade	Product Training	O180 - Turn Your Accountants Into Rockstars: Making the Most of Your ONESOURCE Tools	In this session we will sharing real-life examples of work situations where accurate leverage of ONESOURCE University, ONESOURCE Support, and the ONESOURCE Help Library have made our client users look like pros. We will be walking through a series of short narratives that tell the story of our ONESOURCE resources.	11/16/22	8:00 AM	8:55 AM
O630	Tax & Trade	Thought Leadership	O630 - METRICS FOR ALL, Transformation Journey from ONESOURCE to One-Metrics	How long does it take you to deliver key KPIs to the business? Interested in a new approach using a single source of truth for all metrics definitions that lets business users self-serve for key metrics? Come in to hear more! In this session, Alteryx and Thomson Reuters team will showcase how to standardize and automate State Apportionment and Statutory Reporting Metrics for business users with ONESOURCE and Alteryx Metrics Store.	11/16/22	8:00 AM	8:55 AM
O820	Tax & Trade	Thought Leadership	O820 - Grant Thornton and EmblemHealth: Maximizing ONESOURCE and Data Automation to Drive GAAP and Statutory Reporting for an Insurance Company	EmblemHealth has harnessed ONESOURCE Tax Provision's core functionality to drive standardization in their US GAAP and Statutory Insurance reporting processes. Coupling ONESOURCE with a Data Automation solution, EmblemHealth can connect their disparate reporting groups to their integrated tax operating model.	11/16/22	8:00 AM	8:55 AM
TI520	Tax & Trade	Product Strategy	TI520 - 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.	11/16/22	8:00 AM	8:55 AM
TT630	Tax & Trade	Thought Leadership	TT630 - Grantor Trust Reporting - What Are Your Options?	This session will explain different grantor trusts, the tax treatment of such trusts, and the tax planning advantages of grantor trusts. This session will help trust and tax professionals understand this somewhat confusing topic.	11/16/22	8:00 AM	8:55 AM
DI-DOM380	Tax & Trade	Product Training	DI-DOM380 - Harness the Power of APIs for ONESOURCE Income Tax	This session will cover how APIs can be leveraged for loading and extracting data to and from ONESOURCE Income Tax.	11/16/22	9:20 AM	10:15 AM
DI-INTL710	Tax & Trade	Thought Leadership	DI-INTL710 - Grant Thornton: Unlocking the Potential of Automation Within the International Tax Compliance Process	With expanding reporting obligations, tax practitioners seek advanced automation to assist with aggregating data and completing international tax reporting. This course will include use cases for Data Connection, data analytics tools, and other ONESOURCE add-ins (data import and workpapers).	11/16/22	9:20 AM	10:15 AM
DP730	Tax & Trade	Thought Leadership	DP730 - KPMG: Living In Between the Spreadsheets	A discussion around how tax departments are driving efficiencies into their tax provision processes through connected workpapers by leveraging technologies such as ONESOURCE Workpapers, Alteryx, Power Query, and tax provision.	11/16/22	9:20 AM	10:15 AM
GT510	Tax & Trade	Product Strategy	GT510 - We're Building for YOU: Customer Panel - Share Your feedback and Ideas About the GTM Solution	Join us for an interactive session to share your ideas about ONESOURCE GTM. We will guide the discussion by putting on our listening caps while you provide your feedback and ideas.	11/16/22	9:20 AM	10:15 AM

LT020	Legal Tech	Thought Leadership	LT020 - Discover Strategies & the Secret Sauce for Driving Innovation and Change in the Legal Department	As companies face rapid growth and change, legal departments lead the way in driving greater efficiencies and the adoption of tools and technologies that can have an impact beyond the legal department. Learn how others have driven change in processes and technologies to have a meaningful influence on their organization. Enterprise Legal Management is the administration and execution of all functions of an enterprise law department. General Counsel and In-House legal teams across the globe are under increasing pressure to reduce spend and execute matters and contracts efficiently and reliably. They also must continue being proactive about managing knowledge, business obligations, and risk and be trusted advisers and enablers to the broader business. This session will cover an overview of ELM, top metrics, and a step-by-step plan to approach ELM, starting from matters and spend, to reporting and analytics, to the more advanced uses in automation, knowledge management, contract lifecycle management, to the integration of both the enterprise and legal technology stacks.	11/16/22	9:20 AM	10:15 AM
LT220	Legal Tech	Product Training	LT220 - Visualize Your Data with Power BI Dashboards	A Legal Tracker PowerBI dashboard is an interactive way to connect to and visualize your data. This session will demo dashboard creation, as well as common popular charts.	11/16/22	9:20 AM	10:15 AM
O760	Tax & Trade	Thought Leadership	O760 - Deloitte: Decipher The Impacts Of Finance Transformation On Downstream Tax Systems	Many organizations are embarking on finance transformations. Early identification and understanding of the impacts of these transformations on downstream tax systems are critical to remaining compliant. Deloitte will walk through Dell's transformation journey and how they prepared for this change.	11/16/22	9:20 AM	10:15 AM
O810	Tax & Trade	Thought Leadership	O810 - EY: The Secret Playbook to Integrated Workflow, Document Management and Reporting Solution - ONESOURCE Statutory Reporting and EY's Intelligent Gateway	In this session TR and EY will demonstrate how OSR and EY's Intelligent Gateway bring a comprehensive solution to create and manage your statutory reporting obligations.	11/16/22	9:20 AM	10:15 AM
TI430	Tax & Trade	Thought Leadership	TI430 - 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.	11/16/22	9:20 AM	10:15 AM
TT650	Tax & Trade	Thought Leadership	TT650 - Know Your Alternative Investments	Alternatives aren't just for large institutional investors. This course will discuss the reporting requirements for various investments held (passive, at-risk basis, section 199A, etc.), proposed changes in tax legislation (if any), basis tracking, valuation issues, and the potential for unrelated business taxable income (UBTI). This session will discuss challenges encountered, including third-party prepared returns, rental real estate (passive losses and at-risk basis), debt-financed items creating UBIT for charitable donations and IRAs, additional time requirements, skill-sets needed, and more.	11/16/22	9:20 AM	10:15 AM
WL220	Legal Content	Product Strategy	WL220 - Save Time and Improve Results with Precision Research	Find on-point cases faster and reduce overall legal research time.	11/16/22	9:20 AM	10:15 AM