



***BTI Annual Conference ~ October 15-18, 2017  
The Ritz Carlton ~ Amelia Island, Florida***

**Sunday, October 15, 2017**

12:30 PM                    **BTI Annual Golf Outing** (*Golf Club at Amelia Island ~ Shotgun Start ~ Boxed Lunch*)

6:00 PM - 8:00 PM        **Welcome Cocktail Reception** (*Oceanfront Lawn - Island Breeze Duo Band*)

**Dinner On Own**

**Monday, October 16, 2017**

7:30 AM - 8:30 AM        **Breakfast and Registration** (*Salon 3 & Foyer*)

8:30 AM - 8:45 AM        **Welcome - Bill Van Sadlers - Verizon** (*Salon 1 & 2*)

8:45 AM - 9:45 AM        **General Session - Litigation Trends in State Taxation** (*Salon 1 & 2*)  
CPE: 1 Hour (Taxation)

*Tom Donnelly - Comcast (Moderator)*

*Larry Cusack - KPMG*

*Jeff Friedman - Eversheds Sutherland*

9:45 AM - 10:45 AM      **General Session - The Future of the Industry & the Impact of 5G** (*Salon 1 & 2*)  
CPE: 1 Hour (Business Management & Organization)

*Bill Van Sadlers - Verizon (Moderator)*

*Kyle Malady, SVP and Chief Network Officer - Verizon*

10:45 AM -11:00 AM      **Break** (*Salon Foyer*)

11:00 AM -12:00 PM      **General Session - Data Analytics & Robotics in Taxation** (*Salon 1 & 2*)  
CPE: 1 Hour (Taxation)

*Tom Donnelly - Comcast (Moderator)*

*Kelly Necessary - DHG*

*Daren Campbell - EY*

*Garth Roark - KPMG*

*Caleb Gauen - PwC*

12:00 PM -1:30 PM        **Lunch** (*Oceanfront Lawn*)

**Monday, October 16, 2017 - Continued**

1:45 PM - 2:45 PM **General Session - Changes at the FCC & How It Will Impact Our Industry** (Salon 1 & 2)  
CPE: 1 Hour (Business Management & Organization)

*Mary Vickers - Cox (Moderator)*  
*Lisa Schoenthaler - NCTA*  
*Rachel Welch - Cox*

2:45 PM - 3:45 PM **General Session - Federal Tax & Deals Update** (Salon 1 & 2)  
CPE: 1 Hour (Taxation)

*Phil D'Ambrosio - MSG (Moderator)*  
*Richard Casavechia - Barclays*  
*Dean Shulman - Kirkland & Ellis*  
*Ben Schreiner - Kirkland & Ellis*

6:00 PM - 8:00 PM **Cocktail Reception** (Courtyard - **Palmetto Catz Trio Band**)

**Dinner On Own**

**Tuesday, October 17, 2016**

7:30 AM - 8:15 AM **Breakfast** (Salon 3)

8:15 AM - 8:30 AM **Broadband Tax Institute Annual Membership Meeting** (Salon 1 & 2)

8:30 AM - 9:45 AM **General Session - Tax Inclusive Pricing** (Salon 1 & 2)  
CPE: 1 Hour (Taxation)

*John Barnes - T-Mobile (Moderator)*  
*Mark Swan - Charter*  
*Eric Tresh - Eversheds Sutherland*  
*Jamie Brenner - PwC*

9:45 AM - 10:45 AM **General Session - Federal Tax Reform** (Salon 1 & 2)  
CPE: 1 Hour (Taxation)

*Meredith Garwood - Charter (Moderator)*  
*Nick Giordano - EY*  
*Pam Olson - PwC*

10:45 AM - 11:00 AM **Break** (Salon Foyer)

11:00 AM - 12:00 PM **General Session - State Tax Policy Update** (Salon 1 & 2)  
CPE: 1 Hour (Taxation)

*Jamie Fenwick - Charter (Moderator)*  
*Ellen Berenholz - Comcast*  
*Deborah Bierbaum - ATT*  
*Todd Lard - Eversheds Sutherland*  
*Annabelle Canning - Capitol Tax Partners*

12:00 PM - 1:30 PM **Lunch** (Oceanfront Lawn)

**Tuesday, October 17, 2016 - Continued**

1:45 PM - 2:45 PM     **Breakout #1 - Taxation of Digital Goods (Director's)**  
CPE: 1 Hour (Taxation)

*Brandi Drake - Charter (Moderator)*  
*Brad Ashby - T-Mobile*  
*Deborah Bierbaum - ATT*  
*Charlie Kearns - Eversheds Sutherland*

**Breakout #2 - State Income Tax Controversy (Santa Maria 1)**  
CPE: 1 Hour (Taxation)

*Michael Wall - Sprint (Moderator)*  
*Michele Borens - Eversheds Sutherland*  
*Brian Goldstein - PwC*  
*Ken Jewell - Deloitte*  
*Mario Manniello - Verizon*

**Breakout #3 - Property Tax Update - Current Developments (Santa Maria 2)**  
CPE: 1 Hour (Taxation)

*Jeff Binkley - Deloitte (Moderator)*  
*John Reed - Charter*  
*Larry Vanston - TFI*

2:45 PM - 3:00 PM     **Break (Salon Foyer)**

3:00 PM - 4:00 PM     **Breakout #1 - Employee Movement (M&A) and Above the Line Tax Savings (Director's)**  
CPE: 1 Hour (Taxation)

*Phil D'Ambrosio (Moderator)*  
*Matt Kaufer - Equifax*

**Breakout #2 - Transaction Tax Controversy (Santa Maria 1)**  
CPE: 1 Hour (Taxation)

*George Markley - Cox (Moderator)*  
*Maria Todorova - Eversheds Sutherland*  
*Simon Dagher - Cox*  
*Dustin Davis - Ryan*  
*Maria Biava - Verizon*

**Breakout #3 - International Tax - Hot Topics (Santa Maria 2)**  
CPE: 1 Hour (Taxation)

*Tim Lenneman - Liberty (Moderator)*  
*Jason Robertson - Deloitte*  
*Rob Stout - PwC*

6:00 PM - 9:00 PM     **Dinner on Own**

9:00 PM - Until     **Cocktails, Desserts & Entertainment (Salon Foyer/Terrace - Ryan Oakes ~ Mentalist)**  
[https://harrytv.com/video\\_clips/music-meets-magic/](https://harrytv.com/video_clips/music-meets-magic/)

**Wednesday, October 18, 2017**

8:00 AM - 9:00 AM **Breakfast** (*Plaza Ballroom*)

9:00 AM - 10:00 AM **General Session - Industry Accounting Issues - Revenue Recognition** (*Salon 1 & 2*)  
CPE: 1 Hour (Accounting)

*Joe Greco - Verizon (Moderator)*

*Jon Spisto - EY*

*John Barnes - T-Mobile*

*Jon Stephens - Deloitte*

10:00 AM - 11:00 AM **General Session - IRS Update: Telecom Issues, New Campaigns and Partnership Audit Changes** (*Salon 1 & 2*)  
CPE: 1 Hour (Taxation)

*Brian Paperny - ATT (Moderator)*

*Rachel Hardy - Charter*

*Scott Mackay - EY*

*Alexa Claybon - EY*

*Derek Schraw - Deloitte*

**Conference Concludes**

## **National Association of State Boards of Accountancy (NASBA) Mandated Disclosures**

### **Learning Objective**

The purpose of this conference is to bring together telecommunication industry professionals and consultants to educate and discuss new developments, issues and solutions in the field of taxation. This program provides timely content in federal and state income tax, transactions taxes, and property taxes. Specific learning objectives for each course will be provided by the moderator at the beginning of each session.

### **Program Level**

For this program the attendee should have a general base of knowledge in both the communications industry and some areas of taxation. This program level is advanced.

### **Credits**

It is possible to receive a total of 12 credits by attending all General Session and 2 Breakout Sessions.

### **Prerequisites**

At least five years of experience in one of the following areas: Federal or State Income Tax, Transaction Tax, Property Tax, Payroll Tax, or Tax Technology.

### **Advanced Preparation**

There is no advance preparation required.

### **Type of Delivery Method**

This program will be delivered in Group Live format.

### **Registration Requirements**

Registration may occur up to the commencement of the program. All other details are outlined in the registration materials.

### **Refund/Cancellation Policy**

The refund and cancellation policy is outlined in the registration materials.

### **Complaint Resolution Policy**

For more information regarding administrative policies such as refunds, cancellations and complaints, please contact BTI at [Jennifer.Justis@comcast.com](mailto:Jennifer.Justis@comcast.com)

### **Official Registry Statement**

The Broadband Tax Institute is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org).