

**2021 Tax Reporting & Withholding Virtual Conference  
Agenda**

**Tuesday, April 27** (all times are US Eastern)

- 10:00 – 11:00 Exhibit Hall Open – Visit our sponsor exhibitions to learn the latest in real tax reporting solutions
- 11:00 - 11:50 Latest and Greatest from IRS and IRSAC  
*Debbie Pflieger, Ernst & Young LLP*
- 12:00 - 12:50 Account Opening and Vendor On-Boarding Including Forms W-8s, Electronic Signatures and W-9s, Presumption Rules  
*Iris Goldman, Comply Exchange Limited*  
*Aureon Herron-Hinds, RSM US LLP*
- 1:00 – 2:00 Break / Visit Exhibit Hall
- 2:00 - 2:50 NRA/FATCA Session 1 including New Forms and Regulations, 1042-S and 871(m)  
*William Sheridan, IHS Markit*  
*Nelson Suit, Refinitiv*
- 3:00 - 3:50 NRA/FATCA Session 2 including IRS  
*John Sweeney, Internal Revenue Service*  
*Subin Seth, Internal Revenue Service*  
*Laurie Hatten-Boyd, KPMG LLP*  
*Chip Collins, UBS AG*
- 4:00 – 4:50 DAC 6 and CRS  
*Denise Hintzke, Deloitte Tax LLP*  
*Cordula Clarner, Schalast Rechtsanwälte*

**Wednesday, April 28**

- 10:00 - 11:00 Visit Exhibit Hall
- 11:00 - 11:50 Broker Reporting including Crypto  
*Stevie Conlon, Wolters Kluwer*  
*Anna Vayser, Wolters Kluwer*
- 12:00 - 12:50 Proposed Rules for Form 1099-K and Third Party Network Transactions under the American Rescue Plan Act and Forms 1099-NEC and MISC  
*Cyrus Daftary, KPMG LLP*  
*Kelli Wooten, KPMG LLP*
- 1:00 - 2:00 Break / Visit Exhibit Hall

- 2:00 - 2:50 IRAs and Pensions including New RMD, Regulations, CARES Act Rollovers  
*Sue Diehl, PenServ Plan Services, Inc.*
- 3:00 - 3:50 Lending Issues including SBA Interest Payments and PPP Loan Forgiveness  
*Cheryl Riedlinger, The Tax Reporting Group*  
*Kaylene Crouch, Wells Fargo Bank, NA*
- 4:00 - 4:50 State Reporting  
*Wendy Walker, Sovos Compliance*  
*David Bolner, Broadridge Financial Solutions, Inc.*