

AGENDA

8:00 AM – 8:45 AM **Registration and Breakfast**

8:45 AM – 9:00 AM **Welcome**

- David Wertheim, Managing Director, Regulatory Affairs, LICONY
- Steve Puhala, Assistant General Counsel, Tax, Guardian Life Insurance Company & Chair, LICONY Tax Subcommittee

9:00 AM – 10:00 AM **Session 1: Corporate Tax/Controversy**

Panelists:

- Archan Hazra, Vice President & Corporate Counsel, Tax, Prudential Financial, Inc.
- Sharon Katz-Pearlman, Shareholder, Greenberg Traurig, LLP
- Isaac Silverstein, Partner, Willkie Farr & Gallagher LLP

10:00 AM – 11:00 AM **Session 2: Product Tax**

Panelists:

- Jean Baxley, Tax Managing Director, Deloitte Tax LLP
- Eric Lanning, Vice President, Corporate Counsel, Prudential Financial, Inc.
- Matin “Mat” Momen, Vice President & Associate General Counsel, MetLife
- Alison Peak, Partner, Davis & Harman LLP

11:00 AM – 11:15 AM **Break**

11:15 AM – 12:15 PM **Session 3: International Tax**

Panelists:

- Taylor Cope, Associate General Counsel, New York Life
- Eric Lopata, Vice President, Corporate Counsel, Prudential Financial, Inc.
- Mary Monahan, Partner, Eversheds Sutherland
- Chris Riffle, Principal, PwC

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12:15 PM – 1:15 PM **Lunch**

1:15 PM – 2:15 PM **Session 4: State & Local Tax**

Panelists:

- Kristin DeRespiris, Manager, Guardian Life Insurance Company
- Maureen Flint, Senior Director, Equitable
- Alysse McLoughlin, Partner, Jones Walker LLP
- R.J. Sherwood, Senior Manager, EY

2:15 PM – 3:15 PM **Session 5: Tax Accounting**

Panelists:

- Allen Brown, Senior Federal Tax Lead, Guardian Life Insurance Company
- Wing Mei Chan, Corporate Vice President, New York Life
- Alana Russell, Tax Senior Manager, Deloitte Tax LLP
- Jasmine Small, Senior Manager, Tax, KPMG LLP

3:15 PM – 3:30 PM **Break**

3:30 PM – 4:30 PM **Session 6: Ethics**

Panelists:

- Justin Herring, Partner, Mayer Brown LLP
- David Lizmi, Partner, Mayer Brown LLP

4:30 PM – 5:30 PM **Reception**

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