

LICONY 2025 Tax Conference

THURSDAY, OCT. 23, 2025
GUARDIAN LIFE INSURANCE CO.
HUDSON YARDS, NEW YORK



AGENDA

- 8:00 AM – 8:45 AM **Registration and Breakfast**
- 8:45 AM – 9:00 AM **Welcome**
- Timothy Atkins, Managing Director & Counsel, LICONY
 - Steve Puhala, Assistant General Counsel, Tax, Guardian Life Insurance Company & Vice Chair, LICONY Tax Subcommittee
 - Sarah Sheldon, VP Tax Legal, Lincoln Financial Group & Chair, LICONY Tax Subcommittee
- 9:00 AM – 10:00 AM **Session 1: Legislative Update**
Panelists:
- Tommy Brown, Manager, EY
 - Todd Metcalf, Principal, PwC
 - John Renfrew, Vice President, Federal Affairs, Guardian Life Insurance Company
- 10:00 AM – 11:00 AM **Session 2: Ethics**
Panelist:
- Starling Marshall, Partner, Crowell
- 11:00 AM – 11:15 AM **BREAK**
- 11:15 AM – 12:15 PM **Session 3: State & Local Tax Update**
Panelists:
- Matt Heffernan, Manager, State Tax, Guardian Life Insurance Company
 - Jeff Janoska, Senior Economist, American Council of Life Insurers
 - Alysse McLoughlin, Partner, Jones Walker LLP
 - Scott Migliori, Partner, PwC
- 12:15 PM – 1:15 PM **LUNCH BREAK**
- 1:15 PM – 2:15 PM **Session 4: Hot Topics in Corporate Tax**
Panelists:
- Sharon Katz Pearlman, Shareholder, Greenberg Traurig
 - Eric Lopata, VP, Corporate Counsel, Prudential
 - Nick Tarantin, CVP, Tax, New York Life
 - Melissa Taylor, Managing Director, KPMG
 - David Zaytsev, AVP Tax Reporting & Compliance, Lincoln Financial Group
- 2:15 PM – 3:15 PM **Session 5: Product Tax**
Panelists:
- Jean Baxley, Tax Managing Director, Deloitte Tax LLP
 - Mark Griffin, Partner, Davis & Harman LLP
 - Samera Kadry, AVP, Lincoln Financial Group
- 3:15 PM – 3:30 PM **BREAK**
- 3:30 PM – 4:30 PM **Session 6: International Tax / Pillar II**
Panelists:
- Taylor Cope, Associate General Counsel, New York Life Insurance Company
 - Mary Monahan, Partner, Eversheds Sutherland
 - Rachel Stuto, Tax Manager, Deloitte Tax LLP
- 4:30 PM - 5:30 PM **Reception**

CLE and CPE credit approval is pending. Please provide requested jurisdictions for CLE and/or CPE credit at time of registration. LICONY CLE financial aid policy is available if you qualify under the LICONY policy. A copy of the policy and application will be provided upon request.