



(03/23/23)

**2023 INTERMEDIATE/ADVANCED STATE INCOME
TAX SCHOOL**
May 7-11, 2023
Hyatt Regency DFW International Airport
Dallas, TX

Sponsored by

BLANKROME



Sunday, May 7, 2023

6:00 – 8:00 Registration, Dinner and Evening Fun

Monday, May 8, 2023

7:45 – 8:30 **Welcome & Introduction**
Douglas Lindholm, COST Executive Director
Arthur Parham, Retired General Tax Advisor of Entergy Services LLC
Charles Drury, COST VP/Chief Operating Officer

8:30 – 11:45
8:30 – 10:15 Lecture
10:15 – 10:30 Refreshment Break/
Networking
10:30 – 11:45 Facilitated Breakout

Jurisdictional Nexus and Constitutional Limitations
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Instructors:
Kathleen Cornett, Alston & Bird
Michael Jacobs, Reed Smith*
Breen Schiller, EY*

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This session will cover the various income tax filing methodologies used by the states. Students will learn the differences between the methods and how to support favorable filing positions. Small group breakouts will reinforce the concepts learned in this session.

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Evan Hamme, Pillsbury Winthrop Shaw Pittman*
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Deeper Dive into the Unitary Filing Method(s)
This session will explore the analysis used to determine whether a unitary reporting relationship exists. It will then review the alternative forms of unitary reporting used by unitary reporting states. Small group breakouts will reinforce the concepts learned in this session.

Instructors:
Ben Muilenburg, PwC*
Kelly Smith, PwC*

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	Instructors: Chelsea Marmor, Eversheds Sutherland (US)* Maria Todorova, Eversheds Sutherland (US)*
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	<p>This session will focus on how state tax professionals can work to proactively achieve legislative and tax policy success rather than simply react to legislative change imposed by others.</p> <p>Instructors: Fredrick Nicely, COST Patrick Reynolds, COST</p>
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