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## How Global Companies are Gaining Strategic Advantage by Applying Advanced Technology to Corporate Transaction Taxes

Join us for a afternoon seminar at the Houston MARRIOTT followed by an evening at the Houston Livestock Show and Rodeo®!

**Wednesday, March 11, 2009**

Seminar: **Houston MARRIOTT Medical Center** Time: **12:30 pm - 5:00 pm**

Rodeo: **Reliant Stadium, Suite 321** Time: **5:45 pm**

This **free informational seminar** is ideally suited for finance, business, and IT executives responsible for corporate transaction taxes. It features guest speakers from:

- ▶ **ADP**, a leader in outsourced business solutions including sales and use tax automation, tax credits, and economic incentives;
- ▶ **DuCharme, McMillen & Associates (DMA)**, a best-in-class provider of corporate tax solutions;
- ▶ **Pitney Bowes Business Insight**, a company providing the data, documents, and decisions that drive business;
- ▶ **Siemens**, a global powerhouse in electronics and electrical engineering, operating in the industry, energy and healthcare sectors.

### Featured Speakers



**Charles Collins**

*Vice President of Government Affairs, ADP*

In this session, Charles will talk about the pressing challenges of tax compliance in today's environment. He will discuss how businesses can turn transaction tax calculation and compliance from a potential liability into a business advantage. Charles will look at some of the reasons why companies change their transaction tax systems - from dramatic growth and entrance into new markets to mergers and acquisitions or changes in their ERP systems. He'll talk about the opportunities that present themselves at that time:

- Consolidating multiple tax systems
- Utilizing certified tax systems and content
- Adding international capabilities
- Taking advantage of more modern technologies
- Reducing liability and minimizing audit risk

You'll leave this session with a much clearer understanding of how critical a role corporate transaction taxes play in the larger organization. Additionally, you'll be better prepared to build the case for a modern transaction tax solution to senior management.

**Jonathan Kraft**

*Manager of Benchmarking Services*

**Eric Hanshew**

*Director Partner Relations and Strategic Development, DuCharme, McMillen & Associates (DMA)*

Continued increase in the complexity of Sales and Use Tax regulations has placed significant demands on effective tax administration. Discussion will center on the findings from

*(continued on next page)*

### Agenda

- 12:30-1:30pm Registration & Networking Lunch
- 1:30-2:15pm **Charles Collins, ADP**  
**"Addressing the Challenge of Tax Compliance"**
- 2:15-3:00pm **Jonathan Kraft and Eric Hanshew, DuCharme, McMillen & Associates**  
**"Identification and Adoption of Best Practices in the Sales and Use Tax Process"**
- 3:00-3:15pm Break
- 3:15-4:00pm **Bob Meador, Pitney Bowes Business Insight**  
**"Getting it Right the First Time: Fine-Tuning a Transaction Tax System"**
- 4:00-4:40pm **Sandra Buckinger-Blair, Siemens**  
**"Sales and Use Tax Automation: Your Key to a Leaner, More Agile Business"**
- 4:40-5:00pm Q & A
- 5:45pm Networking Dinner Reliant Stadium, Suite 321
- 6:45pm Houston Livestock Show & Rodeo®  
Reba McEntire Concert



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extensive Sales and Use Tax benchmark studies and several examples of how participants in the studies created positive change to improve their Sales and Use Tax process. Specifically, the session will cover performance attributes and best practices of “Best-in-Class” Corporate Tax Compliance Organizations; how these “Best-in-Class” organizations balance efficiency (cost and productivity) and effectiveness (quality and error rates); and the leverage, productivity, and potential cost savings that technology can provide to the Sales and Use Tax process.



**Bob Meador**  
*Director of GeoTAX Product Management, Pitney Bowes Business Insight*

Many of today’s transaction systems still rely on Zip Code or Zip Plus Four technology. While this may be fine for routing surface mail, it leaves a lot to be desired when it comes to correctly assigning tax jurisdictions. This session will focus on more modern, GPS-based technology that can add pinpoint accuracy to today’s transaction tax systems. Attendees will learn how the application of this technology can improve accuracy by 10%, 20% or even 30% – accuracy that translates into appreciable savings in taxes.



**Sandra Buckinger-Blair**  
*Tax Manager, Siemens Shared Services, Siemens*

What happens when a company applies the right technology to sales and use tax administration? This session follows the implementation of an automated sales and use tax system at a large multinational manufacturing company. Hear a first-hand account of how Siemens implemented a transaction tax system and as a result was able to reduce headcount, lower costs, and minimize liability – while improving compliance and adding value to the company.

**CPE Information**

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**For More Information:**  
1-781-557-2684 ◀ [www.adp.com](http://www.adp.com)

**Seminar Evening Venue**

For more than 76 years, the Houston Livestock Show and Rodeo® has been the heartbeat of the Southwest and ranked as the world’s largest rodeo drawing top contestants. From Texas and across the United States, livestock producers come to the Houston Livestock Show each spring to vie for championship titles, competing in livestock categories from llamas to bulls. Only the best of the best walk away winners!

Reba McEntire was inducted into the Houston Livestock Show and Rodeo Star Trail of Fame in 2007 - she is one of the entertainers on March 11th.

**Directions and Parking**

**Houston MARRIOTT Medical Center**  
6580 Fannin Street  
713-796-0080

**On-site Parking**  
\$9 daily (self park) or \$22 (valet)

**Hotel to Reliant Stadium**  
You may drive or take the Metrorail

- Driving Directions**
- Head southwest on Fannin St toward Dryden Rd
  - Right at Dryden Rd
  - Left at S Main St
  - Left at Kirby Dr
  - Left at Murworth Dr
  - Reliant Park will be on the left
  - Proceed to either the Comcast or the Coca Cola entrance
  - The hospitality suite is #321

- Reliant Stadium Parking**
- Parking is available at the Miller Lite Main Street and South Kirby lots
  - Cost: \$12 per car
  - You must show your suite ticket but not relinquish it

- Metrorail**
- Leave from the Dryden/TMC stop (between University and Dryden) just 1 block from the Marriott hotel
  - Cost: \$1 one way
  - Proceed to either the Comcast or the Coca Cola entrance
  - The hospitality suite is #321

**REMINDER: YOU MUST HAVE YOUR RODEO TICKET WITH YOU AT ALL TIMES**