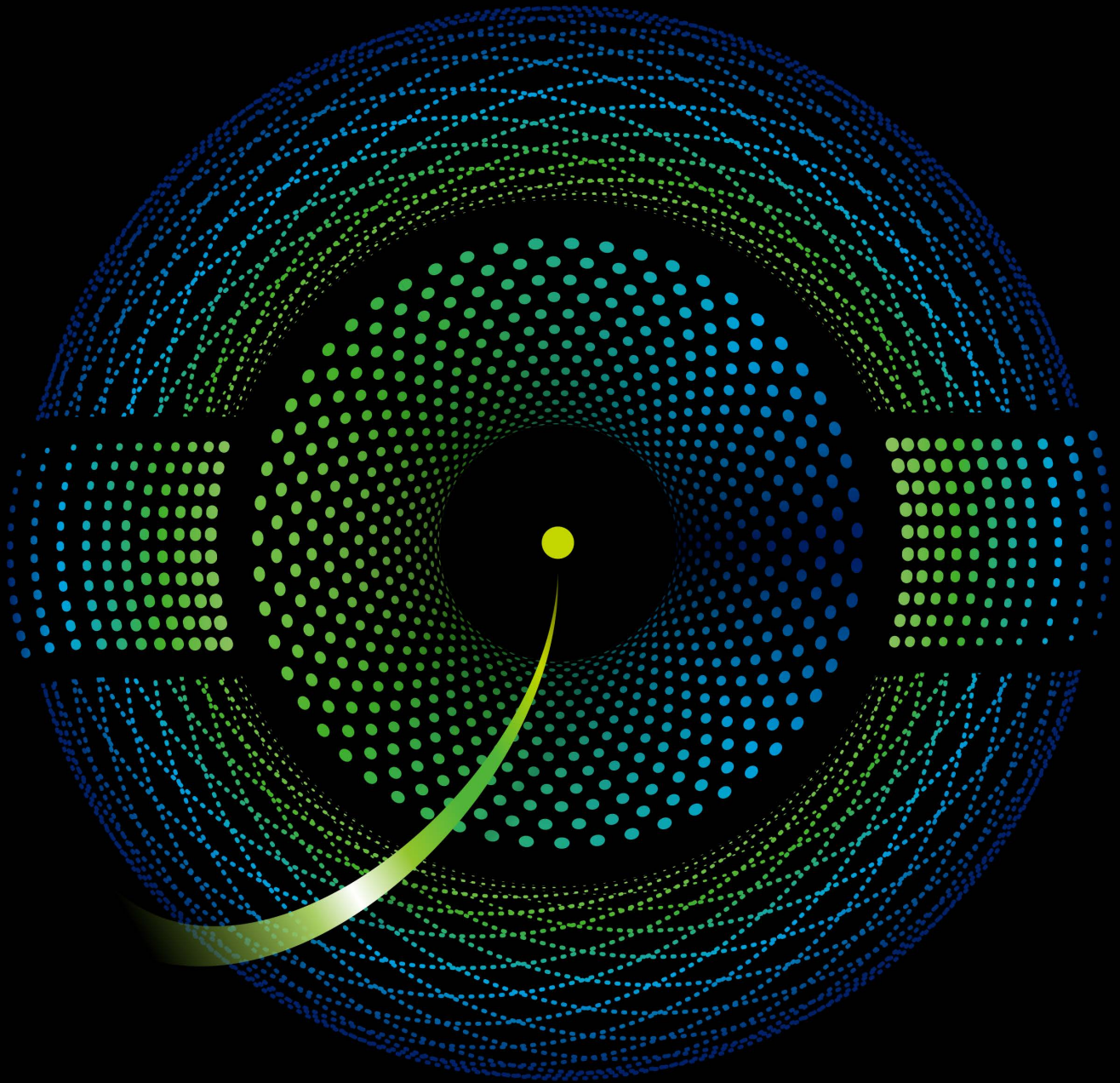




TAX SECTION
of The Florida Bar

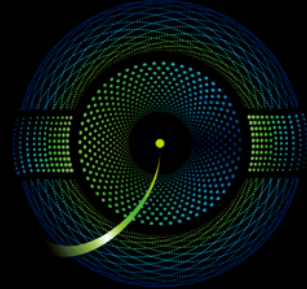


The 2026 National Multistate Tax Symposium

Embracing change with confidence and agility

February 4-6, 2026

Disney's Grand Floridian
Resort & Spa



Wednesday, February 4, 2026

Bonus Session | Florida taxes: What's up and what's next

1:00–2:00 p.m.

H. French Brown IV, Partner, Jones Walker LLP

Mark Hamilton, General Counsel, Florida Department of Revenue

Ian Lasher, Managing Director, Deloitte Tax LLP

Cathy Newport, Senior Manager, Deloitte Tax LLP

Chris Snider, Managing Director, Deloitte Tax LLP

Join Florida tax specialists as they discuss recent tax legislative developments and trends in Florida, including what you may need to know about the upcoming 2026 Florida legislative session. The panelists also will highlight some noteworthy tax cases and decisions from the Florida court system, recent Florida administrative rulings, and issues currently being addressed at the Florida Department of Revenue.

Bonus Session | Accounting for state taxes: ASC 740, ASC 450, and ASU 2023-09 updates

2:15–3:45 p.m.

Lindsay McAfee, Principal, Deloitte Tax LLP

Ben Pronk, Senior Manager, Deloitte Tax LLP

Maritza Royal, Partner, Deloitte Tax LLP

Panelists in this session will provide an update on developments, practicalities and provision life cycle processes for multistate tax professionals in financial accounting for both income- and non-income-based taxes under ASC 740 and ASC 450. The panel also will address implementation of ASU 2023-09 income tax disclosure requirements in the current environment, including leading practices for related data gathering and compliance.

Bonus Session | GenAI: Ethical challenges for multistate tax leaders

4:00–5:00 p.m.

Tasha Austin, Principal, Deloitte & Touche LLP

Nicki N. Howard, Shareholder, Greenberg Traurig, LLP

Amber Rutherford, Managing Director, Deloitte Tax LLP

Jeff York, Partner, Deloitte Tax LLP

Join some interactive, hands-on discussions designed for state tax department professionals as panelists in this session explore real-world ethical scenarios arising from the adoption and reliance on generative artificial intelligence (GenAI) in tax processes and functions. Gain practical insights into the unique challenges and responsibilities facing multistate tax executives in today's rapidly evolving GenAI landscape.

Welcome reception | 5:30 p.m.

Join the National Multistate Tax Symposium speakers and advisory council members at the Summerhouse Patio and Beach Bar for appetizers and drinks. Network with fellow tax executives and prepare to enjoy the next two days

Thursday, February 5, 2026

Breakfast | 7:00-8:00 a.m.

Join your peers for informal networking and conversation over breakfast at industry-designated tables. Share, listen and learn from your fellow industry colleagues!

Greetings and opening remarks

8:15–8:30 a.m.

H. French Brown IV, Partner, Jones Walker LLP

Valerie Dickerson, Partner, Deloitte Tax LLP

Jairaj Guleria, Partner, Deloitte Tax LLP

Multistate tax: Embracing change with confidence and agility

8:30–9:30 a.m.

Moderator: Jairaj Guleria, Partner, Deloitte Tax LLP

Jessica Huber-Broege, Partner, Deloitte Tax LLP

Stephen LaRosa, Executive Director, U.S. State & Local Tax, AstraZeneca

Leann Shines, Vice President, Dell Technologies Inc.

Fred Thomas, Principal, Deloitte Tax LLP

Kicking off the day, this seasoned panel of state tax specialists will provide their opening observations, practical insights, and commentary on how corporate tax departments may embrace the ongoing process and technology transformations—and the growing complexity of tax technical challenges—with poise, resiliency, and optimism. The panel will consider tax function innovations and generative artificial intelligence (GenAI) in use today, and how multistate tax professionals may leverage and lead their corporate tax departments and businesses in the years ahead.

Addressing multistate tax controversies with confidence: Audit trends and hot topics

9:45–10:45 a.m.

Moderator: Jack Trachtenberg, Principal, Deloitte Tax LLP

Latoya Edwards, Vice President, North America Tax Operations, Visa

Brianne Moriarty, Senior Manager, Deloitte Tax LLP

Marc Simonetti, Partner, State Tax Law LLC

Christanna Springs, Principal, Deloitte Tax LLP

With increased scrutiny from many state and local taxing authorities, this session will focus on current tax audit trends and pressing state tax controversy hot topics and challenges facing today's multistate tax leaders. Participants will come away with some practical approaches for responding with confidence and adeptness to the rapidly changing multistate tax regulatory environment.

First “Embracing change with confidence and agility” breakout

11:00 a.m.–12:00 p.m. (3 courses offered)

M&A: Pre- and post-transaction multistate tax planning with poise

Jason Kang, Principal, Deloitte Tax LLP

Guinevere Seaward, Managing Director, Deloitte Tax LLP

Archana Warner, Managing Director, State and Local Tax, Constellation Energy

This session will explore some practical approaches for effective state and local tax planning both before and after business mergers, acquisitions, and reorganizations. Panelists will illustrate how

multistate tax leaders can stay attentive to the underlying state income and indirect tax technical considerations and be ready to execute with confidence on potential opportunities that may aid the processes, drive value and ease unintended consequences.

Managing change: Business model planning and multistate tax implications

Jivan Datta, Principal, Deloitte Tax LLP

Dan Korthals, Senior Manager, Deloitte Tax LLP

Alysse McLoughlin, Partner, Jones Walker LLP

Natasha Ng, Senior Tax Manager, ServiceNow

As federal and international tax and tariff laws continue to evolve, many corporate tax departments are assessing the resulting multistate tax implications and offering their business partners options to manage the potential benefits and drawbacks. This session will focus on business model planning in light of the One Big Beautiful Bill Act and rising tariffs; what some companies are doing in response; and the important state and local tax considerations at stake.

Tax audit lifecycle: Controversy coping mechanisms for adapting and thriving

Sheelagh Beaulieu, Sr. Director, State Income Tax, CVS Health

Craig B. Fields, Partner, Blank Rome LLP

Robert Waldow, Principal, Deloitte Tax LLP

Eva Lopez, Managing Director, Deloitte Tax LLP

Andy Yates, Senior Manager, Tax Controversy, DoorDash

Through hands-on illustrative case study scenarios, participants in this session will examine the lifecycle of multistate tax controversies and explore potential opportunities for multistate tax leaders to proactively advocate for their company's view of the proper application of the relevant tax laws to the facts from start to finish. The panelists in this session will serve as coaches and offer some coping mechanisms and tools for adapting and thriving as your team confronts each step of the audit process.

Lunch and luncheon address

12:00 – 1:15 p.m.

Navigating change: The impact of tariffs on global trade policy and supply chains

Moderator: Sarah Murray, Principal, Deloitte Tax LLP

Becky Allan, Senior Manager, Deloitte Tax LLP

Lindsey Berckman, Principal, Deloitte Consulting LLP

Susanna Samet, Managing Director, Deloitte, LLP

Join us for this luncheon panel discussion as we examine the sweeping effects of new tariffs introduced by the Trump administration and the resulting retaliatory measures from around the world. Our panel will discuss how these global trade policies are reshaping industries – including those traditionally unaffected by tariffs – by altering global trade flows and supply chain strategies. The panel will address both the potential disruptions and emerging opportunities for businesses to adapt their operating models and strategic approaches in the changing landscape.

Second “Embracing change with confidence and agility” breakout

1:30–2:30 p.m. (3 courses offered)

Managing change: Business model planning and multistate tax implications

Jivan Datta, Principal, Deloitte Tax LLP

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Credits and incentives: Proactively obtaining, defending, and sustaining

William M. Backstrom, Jr., Partner, Jones Walker LLP

Irene Manos, Principal, Deloitte Tax LLP

Lee Young, Principal, Production and Incentive Planning, The Walt Disney Company

Panelists in this session will discuss important changes and developments in statutory tax credits and discretionary incentives (C&I) at both federal and state levels and resulting potential opportunities for your business. The speakers will offer actionable guidance on successfully obtaining C&I and some practical approaches for preserving previously earned benefits on audit with proper planning, documentation, and execution as well as ongoing communication and maintenance.

Third “Embracing change with confidence and agility” breakout

2:45–3:45 p.m. (2 courses offered)

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Navigating uncertainty in state tax regimes and enforcement: Strategies for tax team dexterity

4:00–5:00 p.m.

Moderator: Valerie Dickerson, Partner, Deloitte Tax LLP

Moderator: Aaron Solomon, Principal—Income Tax, The Walt Disney Company

Kirsten Gulotta, Principal, Deloitte Tax LLP

Kathy Makas, Tax Director, Target Corporation

Alexis Morrison-Howe, Principal, Deloitte Tax LLP

Patrick Reynolds, President & Executive Director, Council On State Taxation

Lisa Whitehead, Assistant Vice President of Tax, Cox Enterprises, Inc.

This closing panel explores how state and local governments facing budget shortfalls may react – including by broadening existing tax bases; enacting different taxing schemes; and adopting assertive approaches to tax compliance and enforcement – and how attentive, flexible, and proactive multistate tax leaders may stay ahead of the curve in times of uncertainty to help boost workable reforms and deliver greater value across their businesses.

Dinner reception & fireworks at Epcot | 6:30 p.m.

Join us for a magical evening at Disney’s Epcot with your fellow conference colleagues, guests, and families. Enjoy a dinner reception with a few surprises for the kids, as well as an exclusive viewing of Epcot’s nighttime spectacular *Luminous: The Symphony of Us* fireworks show over the water. Please refer to your conference registration for additional details.

Friday, February 6, 2026

Breakfast | 7:00-8:00 a.m.

General breakout session 1

8:00–9:00 a.m. (3 courses offered)

Leading practices for the state tax function: Talent, technical skills, and technology

Jessica Huber-Broege, Partner, Deloitte Tax LLP

Dan Roberts, Tax Director, Elevance Health, Inc.

Jeannette Thorel, Managing Director, Deloitte Tax LLP

Patrick Waldo, Tax Director, Nationwide

Panelists in this session will demonstrate how today's leaders may build a leading multistate tax function that meets the evolving demands of their businesses, and how the foundations of top talent, strong tax-technical skills, and well-leveraged processes, tools, and GenAI remain crucial for doing so. In the process, the panelists will consider how a leading multistate tax function must collectively drive value, manage risk, and build a brand recognizable by its C-suite.

Sourcing & situsing for multistate direct and indirect taxes: Tools and tips

Moderator: Samir Ramakrishna, Partner, Deloitte Tax LLP

Jordan M. Goodman, Partner, Kilpatrick Townsend & Stockton LLP

Terri McDonald, Tax Director, AMETEK

Kathy Saxton, Managing Director, Deloitte Tax LLP

Multistate tax leaders are often tasked with deciphering a maze of state and local income tax sourcing laws and sales and use tax "situsing" laws to novel and complex revenue streams, especially with newer and emerging business models. Join this panel of multistate tax specialists as they illustrate some of the related quandaries and inconsistencies and offer some leading practices for implementing suitable attribution methodologies within a company's framework of accessible data and tools.

Looking ahead: Modeling multistate tax implications

Shonda Bajorek, Partner, Deloitte Tax LLP

Chad Halloran, Senior Manager, Deloitte Tax LLP

Tyler Juckem, Vice-President Taxation, Elevance Health, Inc.

While corporate tax departments assess the multistate tax implications of actual global, federal, state and local law changes and organizational reforms, this hands-on workshop focuses on modeling the potential multistate tax implications of possible forthcoming changes and reforms and how doing so may permit tax professionals to stay one step ahead and plan accordingly for a variety of outcomes. Come with questions and your own stories to share!

Multistate tax legislative and administrative developments: The now and next

9:15–10:15 a.m.

Moderator: Ben Elliott, Principal, Deloitte Tax LLP

Lindsay Crews, Partner, Deloitte Tax LLP

Todd Lard, Tax Counsel, Tax Executives Institute, Inc.

Snowden Rives, Senior Manager, Deloitte Tax LLP

Drew VandenBrul, Managing Director, Deloitte Tax LLP

As many states continue to manage stacking budgetary pressures and the immediate need to address the impact of recent federal tax law changes, this panel of multistate tax specialists will share insights on some recently enacted and pending state tax legislation, underlying legislative trends, and important multistate tax administrative developments – and highlight how these movements and reforms may impact your business today and in the coming years.

Multistate non-income taxes and reporting: Hot topics and perspectives

10:30–11:45 a.m.

Moderator: Robert Wood, Principal, Deloitte Tax LLP

Jenna Fennelli, Senior Manager, Deloitte Tax LLP

Becky Gibree, Tax Director, Akamai Technologies, Inc

Kristy Kirk, Managing Director, Deloitte Tax LLP

Douglas L. Lindholm, Special Counsel and Chair, STRI Advisory Board, Council On State Taxation

Marcia Shippey-Pryce, Managing Director, Deloitte Tax LLP

Zach Tekely, Senior Manager, Deloitte Tax LLP

Explore hot topics and emerging trends in multistate non-income taxes and other reporting matters with our panel of state and local indirect tax specialists. This session will cover developments in sales/use taxes, gross receipts taxes, digital advertising taxes, property taxes, excise taxes, unclaimed property, as well as the advent of other newer, nuanced or transaction-based state and local taxes. Gain important insights into how they may affect your business and uncover potential opportunities.

Lunch and luncheon address

11:45 a.m. –1:00 p.m.

Capitol Hill update: What's next on the horizon

Alex Brosseau, Senior Manager, Deloitte Tax LLP

Anna Taylor, Principal, Deloitte Tax LLP

This lively luncheon session will explore what happened on the Hill in tax policy in 2025 and what to expect in the year ahead. Hear what tax professionals should be on the lookout for, when we might see action on any important tax items, and how political dynamics may affect any proposals.

General breakout session 2

1:15–2:15 p.m. (3 courses offered)

Leading practices for the state tax function: Talent, technical skills, and technology

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Questions or inquiries:

USMultistateTaxSymposium@deloitte.com



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