Preliminary Program

Agenda Subject to Change. All Times are Central Standard Time.

Tuesday, June 6th, 2023

9:00 am – 9:15 am  Welcome, Hotel Safety, and Introductions
                    Rae Takai – Motiva Enterprises LLC

9:15 am - 9:45 am  Washington Update
                    Nicole Horton-Diaz – API

9:45 am - 10:30 am IRS Update
                    Cindy Ferwerda
                    Alan Anderson
                    Allison Boyd
                    Karmen Apitz-Porter

10:30 am - 11:00 am BREAK

11:00 am - 11:30 am The Future of Sustainable Aviation Fuel – ‘It’s Got Wings’!
                    Sam Dagley - PWC

11:30 am – 12:00 pm Duty Drawback Refund Opportunities
                    Matt Anderson – Charter Brokerage

12:00 pm - 1:30 pm  LUNCH

1:30 pm - 2:30 pm  Breakout A – Navigation Strategies Toward Resolving Tax Matters
                    Lee Burke – Motiva Enterprises LLC
                    Melissa Winkler – Phillips 66
                    Wade Phillips – Shell USA, Inc.
                    Marcos Salazar – ExxonMobil
1:30 pm - 2:30 pm  **Breakout B – Superfund OST and the New Frontier**  
Ed Greenstein – bp America  
David Retz – Chevron  
Heather Holloman – Shell USA, Inc.  
Shawn O’Brien – Mayer Brown LLP

2:30 pm - 3:00 pm  **BREAK**

3:00 pm - 4:00 pm  **Breakout A – Navigation Strategies Toward Resolving Tax Matters**  
Lee Burke – Motiva Enterprises LLC  
Melissa Winkler - Phillips 66  
Wade Phillips – Shell USA, Inc.  
Marcos Salazar – ExxonMobil

3:00 pm – 4:00 pm  **Breakout B – Superfund OST and the New Frontier**  
Ed Greenstein – bp America  
David Retz – Chevron  
Heather Holloman – Shell USA, Inc.  
Shawn O’Brien – Mayer Brown LLP

4:00 pm – 5:00 pm  **Welcome Reception**

**Wednesday, June 7th, 2023**

9:00 am – 9:15 am  **Welcome, Hotel Safety, and Introductions**  
Ed Greenstein – bp America

9:15 am – 10:00 am  **Hot Topics in: AL, LA, MS, NM and OK**  
Anne Martin – Ernst & Young LLP  
Chelsea Rouen – Ernst & Young LLP

10:00 am – 10:30 am  **Hot Topics: Western States Petroleum Association (WSPA)**  
David Retz – Chevron  
Fabian Urbina – WSPA
10:30 am – 11:00 am  **BREAK**

11:00 am – 11:30 am  **Hot Topics in: TX**
  Chris Blackwell – Deloitte Tax LLP
  James White – Deloitte Tax LLP

11:30 am – 12:00 pm  **Hot Topics in: Canada**
  Robert Kreklewetz – Millar Kreklewetz LLP

12:00 pm – 1:30 pm  **LUNCH**

1:30 pm – 2:30 pm  **Breakout A – Credits and Incentives**
  Sandra Nash - Chevron
  Brian Culvey – KPMG
  Heather Benedict – Motiva Enterprises LLC
  Jesse Broderick – Sumit Credits
  Kerry Creager – Phillips 66

1:30 pm – 2:30 pm  **Breakout B – Sales and Use Tax Audits**
  Jim Ackerman – Chevron
  Tracy Hargrove – DuCharme, McMillen & Associates, Inc.
  Antorri Roby – Shell USA, Inc.
  Claudia Ayarzagoitia – ExxonMobil

2:30 pm – 3:00 pm  **Break**

3:00 pm – 4:00 pm  **Breakout A – Credits and Incentives**
  Sandra Nash - Chevron
  Brian Culvey – KPMG
  Heather Benedict – Motiva Enterprises LLC
  Jesse Broderick – Sumit Credits
  Kerry Creager – Phillips 66
3:00 pm – 4:00 pm  **Breakout B – Sales and Use Tax Audits**

Jim Ackerman – Chevron
Tracy Hargrove – DuCharme, McMillen & Associates, Inc.
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