

# P R E L I M I N A R Y P R O G R A M

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

Tuesday, June 4<sup>th</sup>, 2024

- 9:00 am – 9:15 am      **Welcome, Hotel Safety, and Introductions**  
Edward Greenstein – bp America
- 9:15 am - 9:45 am      **Washington Update**  
Nicole Horton-Diaz – API
- 9:45 am - 10:30 am      **IRS Update (David)**  
Alan Anderson, Allison Boyd, and Karmen Apitz-Porter
- 10:30 am - 11:00 am      **BREAK**
- 11:00 am - 11:30 am      **Sustainable Aviation Fuel Updates & Airline Priorities**  
Sam Dagley - PWC  
Airlines Rep – TBD
- 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 – Transition from Volumetric Credits to Income Tax Credits**  
David Retz – Chevron
- 1:30 pm - 2:30 pm      **Breakout B – Audit Panel**  
David Retz – Chevron  
Heather Holloman – Shell USA, Inc.
- 2:30 pm - 3:00 pm      **BREAK**
- 3:00 pm - 4:00 pm      **Breakout A – Transition from Volumetric Credits to Income Tax Credits**  
David Retz – Chevron

3:00 pm – 4:00 pm **Breakout B – Audit Panel**

TBD- Chevron

TBD – Shell USA, Inc.

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

### Wednesday, June 5<sup>th</sup>, 2024

9:00 am – 9:15am **Welcome, Hotel Safety, and Introductions**

Ed Greenstein – bp America

9:15 am – 10:00 am **Hot Topics in: AL, LA, and MS**

TBD – TBD

10:00 am – 10:30 am **Hot Topics: Western States Petroleum Association**

TBD – TBD

10:30 am – 11:00 am **BREAK**

11:00 am – 11:30 am **Hot Topics in: TX I**

TBD – TDB

11:30 am – 12:00 pm **Hot Topics in: TX II**

TBD – TBD

12:00 pm – 1:30 pm **LUNCH**

1:30 pm – 2:30 pm **Breakout A – State of Tax Technologies and SAP Implementation (Roundtable)**

Jacklyn Thomas – Exxon

1:30 pm – 2:30 pm **Breakout B – Audit Roundtable**

TBD – TBD

2:30 pm – 3:00 pm **Break**

3:00 pm – 4:00 pm **Breakout A – State of Tax Technologies and SAP Implementation (Roundtable)**

3:00 pm – 4:00 pm **Breakout B – Audit Roundtable**

TBD – TBD



American  
Petroleum  
Institute

## Excise Tax Forum

June 4<sup>th</sup> – 5<sup>th</sup>, 2024 |, Houston TX

---