Forum Program

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

Tuesday, June 4th, 2024

7:00 am – 5:00 pm
Registration

8:00 am – 9:00 am
Continental Breakfast

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
Cindy Ferwerda, Alan Anderson, Allison Boyd, and Tammy Denson

10:30 am - 11:00 am
BREAK

11:00 am - 11:30 am
Sustainable Aviation Fuel Updates
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 – Transition from Volumetric Credits to Income Tax Credits
David Retz – Chevron
Taylor Cortright – KPMG

1:30 pm - 2:30 pm
Breakout B – Audit Panel
Heather Holloman – Shell USA, Inc.
Matt Anderson – Charter Brokerage
Josh Breland – Atlas Oil

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
Taylor Cortright, KPMG

Breakout B – Audit Panel
Heather Holloman – Shell USA, Inc.
Matt Anderson – Charter Brokerage
Josh Breland – Atlas Oil

4:00 pm – 5:00 pm
Welcome Reception
Sponsored by: Akore Software, Avalara, BDO USA, P.C., IGEN, KSM, Lewis Software Associates LLC, Millar Kreklewetz LLP, Thomson Reuters, and Weaver

Wednesday, June 5th, 2024

7:00 am – 5:00 pm
Registration

8:00 am – 9:00 am
Continental Breakfast

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, and MS
Jay Adams – Jones Walker

10:00 am – 10:30 am
Hot Topics: Western States Petroleum Association (WSPA)
Ben Oakley, WSPA David Retz, Chevron

10:30 am – 11:00 am
BREAK

11:00 am – 12:00 pm
Hot Topics in: Texas
Karey Barton – KPMG
Ray Langenberg – Texas Comptroller’s Office

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 – ExxonMobil Tanya Webb – Chevron
Holly Hamby – Deloitte
Drue Wagoner - ConocoPhillips
Breakout B – Audit Roundtable
Teresa Chavez – ExxonMobil
Amy Herman – KSM
Donnielle Parizek – P66
Chris Blackwell, Deloitte

2:30 pm – 3:00 pm
BREAK

3:00 pm – 4:00 pm
Breakout A – State of Tax Technologies and SAP Implementation (Roundtable)
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Drue Wagoner - ConocoPhillips
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Amy Herman – KSM
Donnielle Parizek – P66
Chris Blackwell, Deloitte