

F O R U M P R O G R A M

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

Tuesday, June 4th, 2024

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|---------------------|--|
| 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 – 9:15am

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)

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