



AGENDA

SUNDAY, September 23

- 3:00 p.m. – 7:30 p.m. **Registration and Exhibit Set-Up**
Capitol View Terrace
- 4:00 p.m. – 6:00 p.m. **WSATA Annual Business Meeting**
Bickler Rm 3rd Floor
Commissioners and Invited Guest Only
- 6:30 p.m. – 9:00 p.m. **Opening Reception**
Hotel – The backYARD

MONDAY, September 24

- 7:00 a.m. – 5:00 p.m. **Registration**
Hotel – North Foyer
- 7:30 a.m. – 8:30 a.m. **Breakfast Buffet**
Capitol View Terrace
- 8:30 a.m. – 8:45 p.m. **General Session**
Capitol Ballroom E
Presiding: Mike Reissig, Texas Comptroller's Office
- Welcome Message**
Glenn Hegar, Texas Comptroller of Public Accounts
- 8:45 a.m. – 10:00 a.m. **National Overview of SALT**
Capitol Ballroom E
The Executive Directors of the Council on State Taxation, the Federation of Tax Administrators and the Multistate Tax Commission, along with national practitioners, will discuss hot topics and issues facing the SALT world.
Moderator: Karey Barton, Texas Comptroller's Office
- Gale Garriott, FTA Executive Director
 - Doug Lindholm, COST Executive Director
 - Greg Matson, MTC Executive Director
 - Marilyn Wethekam, Horwood Marcus & Berk
 - Cindy Ohlenforst, K&L Gates
- 10:00 a.m. – 10:15 a.m. **BREAK**

10:15 a.m. – Noon

Commissioners Roundtable

Capitol Ballroom E

WSATA representatives will discuss programs, initiatives and activities of note at their departments of revenue, plus their views on hot SALT issues.

Moderator: Jim Eads, Ryan LLC

Noon – 1:30 p.m.

Lunch Provided

The sideYARD

1:30 p.m. – 3:00 p.m.

Breakout Sessions

1. Can We Talk? State Tax Collection Best Practices

Capitol Ballroom F&G

Tax collection is a serious topic. Talking about it doesn't have to be. Join the Enforcement Division of the Texas Comptroller's office in an open and frank discussion about enforcement and collection initiatives. We will start with an overview of our collections processes, from initial call center activities to the local field offices. We will highlight key performance measures, including our wireless computing solution, and share our best practices related to enforcement and collections. We will share our challenges, successes, and failures; be ready to do the same!

Moderator: Kristin Adkins, Texas Comptroller's Office

- John Frazier, Texas Comptroller's Office
- Larry Skarpa, Texas Comptroller's Office

2. Improving Management & Employee Engagement

Capitol Ballroom E

How do you get a pulse from your staff in today's climate? What are the challenges of motivating employees in the current workforce? What other contemporary obstacles face personnel currently in the management role? What are the reasons behind present management attrition rates? Hear from top tax administrators about unique initiatives and the steps they are taking to improve management and employee engagement.

Moderator: John W. Reynolds, Jr., Texas Comptroller's Office

- Eric Smith, Oregon DOR
- Mike Reissig, Texas Comptroller's Office
- Vikki Smith, Washington DOR

3. Stories from the Front Line: An Allied Fight Against Stolen Identity Refund Fraud

Capitol Ballroom H

In 2017 the IRS, state tax agencies and the tax industry joined forces to form the Identity Theft and Tax Refund Fraud ISAC (Information Sharing Analysis Center) as a way to share information and analytics necessary to detect, prevent and deter activities related to stolen identity refund fraud. Join our discussion to learn more about these collaborative efforts as our speakers share anecdotes and their experiences as members of this new public/private partnership.

Moderator: Daniel Wood, Texas Comptroller's Office

- Sharonne Bonardi, Maryland Comptroller
- Todd Egaas, IRS
- Denise Davis, IRS

3:00 p.m. – 3:30 p.m.

BREAK

3:30 p.m. – 5:00 p.m.

Breakout Sessions

1. Tax Legislation and Controversies: Nobody Knew it Could Be So Complicated

Capitol Ballroom E

Hear the experiences of tax professionals in three states that recently switched to market-based sourcing, and learn about the theories of rulemaking that can be applied to resolve tax controversies.

Moderator and Presenter: Ray Langenberg, Texas Comptroller's Office

"Moving to Market Based Sourcing"

- Michael Fatale, Massachusetts DOR
- Jeff Henderson, Oregon DOR
- Lee Baerlocher, Montana DOR

"Rulemaking to Resolve Controversies"

- Ray Langenberg, Texas Comptroller's Office

2. National and International Best Practices in Tax Audits

Capitol Ballroom H

Join staff from Texas and Washington State as they discuss how they have streamlined workflows by performing audits using various techniques while on shoestring state budgets. In addition, learn how other countries are automating their audit and assessment procedures.

Moderator: Rosie Julius, Texas Comptroller's Office

- Tony LaBove, EY
- Mark Charette, Washington DOR
- Emma Fuentes, Texas Comptroller's Office

3. Taxpayer Communications and Voluntary Compliance

Capitol Ballroom F&G

Why do people comply with tax laws? How do we get more people to comply? Take a deeper dive into effective (and ineffective) ways to improve voluntary compliance through taxpayer communications and services. Learn about practical approaches and best practices for developing responsive websites, mobile apps, webinars, podcasts, and other communications.

Moderator: Korry Castillo, Texas Comptroller's Office

- Janet Shimabukuro, Washington DOR
- Kristan Barbour, Montana DOR
- Cory Chandler, Texas Comptroller's Office

5:00 p.m. – 6:00 p.m.

Partnership Social

Capitol View Terrace

We encourage everyone to stop by this happy hour to thank our sponsors and learn more about their products and services. You will receive a tasty beverage, and the chance to win a free Southwest Airlines gift card and a two-night stay at a Sheraton property (all provided by WSATA). Cheers!

DINNER ON YOUR OWN

Enjoy your evening out on the town in the Live Music Capital of the World.

Check out your Texas Comptroller Staff Picks Booklet for our recommendations for food, music, sights, and fun!

TUESDAY, September 25

7:00 a.m. – 5:00 p.m. **Registration**

7:30 a.m. – 8:30 a.m. **Breakfast Buffet**
Capitol View Terrace

7:30 a.m. – 8:30 a.m. **Commissioners Breakfast**
Bickler Room 3rd Floor

No formal agenda unless there is unfinished business from Sunday's business meeting.

8:30 a.m. – 8:45 a.m. **General Session**
Capitol Ballroom E

Presiding: Eric Smith, Oregon DOR

Invitation to WSATA 2019

8:45 a.m. – 10:00 a.m. **Economic Trends in the Western States**
Capitol Ballroom E

Tom Currah, chief revenue estimator at the Texas Comptroller's Office, will provide an update to his WSATA 2017 presentation on energy issues in the Western States. Eric Cropper, senior economist at the Utah State Tax Commission, will talk about the drivers behind the thriving economy in Utah.

10:00 a.m. – 10:15 a.m. **BREAK**

10:15 a.m. – 11:45 a.m. **Tax Administration Before, During, and After a Natural Disaster**
Capitol Ballroom E

Emergency management during a natural disaster is more than just law enforcement and danger mitigation. Departments of Revenue can play a critical role in assisting a state's emergency response and supporting taxpayers during disaster and recovery. Learn about the importance of planning and practicing emergency responses. Hear the perspectives of both government and industry professionals on lessons learned from the response in Texas to Hurricane Harvey in 2017.

Moderator: Korry Castillo, Texas Comptroller's Office

"Planning for Emergency Response"

- Chief Nim Kidd, Texas Department of Public Safety

"Government and Industry Panel"

- Deborah Bierbaum, AT&T
- Karey Barton, Texas Comptroller's Office
- Mike Soto, Aransas County Appraisal District
- Billy Hamilton, Texas A&M University

11:45 a.m. – 1:30 p.m. **Lunch on Your Own**

1:30 p.m. – 3:00 p.m.

Breakout Sessions

1. Sponsor Series – Fast Enterprises

Capitol Ballroom H

Collecting and Remitting Sales and Use Tax at the Point of Sale

The technology exists to change when and how sales tax is remitted to taxing agencies. It is now feasible to remit sales tax collected at the point of sale for transactions consummated using electronic payment methods. This presentation will provide an overview of accelerated remittance of sales tax at the point of sale, including pros and cons, challenges, impact on businesses collecting sales tax and the contribution it would make towards reducing the tax gap. It will also draw parallels with the transformation of returns processing to electronic filing – a long-term effort that required consensus about the objective, uniform standards amongst the states, and working with external stakeholders.

Presenter: Joe Milack, FAST Enterprises

2. State Tax Issues Implicated by Federal Tax Reform and IRS Partnership Audit Rules

Capitol Ballroom E

Congress and the IRS have recently given the states much to wrestle with on the income tax front between major tax reform legislation and major rule changes affecting partnership audits. Hear from legal experts who have been studying these issues as they provide insights and guidance.

Moderator: Nancy Prosser, Texas Comptroller's Office

- Federal Tax Reform - Karl Frieden, COST
- IRS Partnership Audit Rules - David Colmenero, Meadows, Collier, Reed, Cousins, Crouch & Ungerman, L.L.P.
- State Perspectives - Helen Hecht, MTC

3. Zappin' the Bad Guys: Best Practices to Stop Sales Suppression Fraud

Capitol Ballroom F&G

DOR experts at the forefront of this fight will discuss initiatives, best practices, and forensic investigative tools to combat zappers, sales suppression fraud and similar bad acts.

Moderator: Captain Justin Scott, Texas Comptroller's Office

- Billy Fulton, Texas Comptroller's Office
- Bill McNerney, Wyoming DOR
- Jerome Salido, Washington, DOR

3:00 p.m. – 3:30 p.m.

BREAK

3:30 p.m. – 5:00 p.m.

Breakout Sessions

1. Sponsor Series II - RSI

Capitol Ballroom H

"Transition Planning for Large Software Project Operations"

Is your agency planning or implementing a large software project in the near future? If so, careful consideration of the operational elements of the project, as well as the support model, can make a huge impact. It takes attentive planning to put the RIGHT team together, and no lack of effort to enable that team to manage the application properly once it goes live. The project is rarely over when the final release goes into production! During this session, we will discuss key considerations, options available to your agency, challenges the project may encounter and strategies to guide you and your agency successfully through it all.

Presenter: David Casey, Revenue Solutions, Inc.

2. The “Next Big Thing”? Blockchain Technology and Cryptocurrencies

Capitol Ballroom E

Experts will discuss recent advances and future developments regarding the taxation and regulation of cryptocurrencies, the underlying blockchain technology and State Legislation.

Moderators & Presenters: Irakli Mirzashvili, Texas Comptroller’s Office, and Nick Souza, Mondrik & Associates

- Jason M. Tyra, CPA
- Robert Long, Bell Nunnally & Martin LLP

3. Marijuana Tax: From Black Market to Legalization

Capitol Ballroom F&G

Several WSATA states were among the first to tax marijuana, and their experiences continue to lead the way for other states that legalize the use of recreational marijuana. Panelists will discuss their state’s journey to legalized marijuana, covering topics such as how their state collects the marijuana tax and enforces its marijuana tax laws and the pros and cons of taxing recreational marijuana.

Moderator: Joseph Scanio, Texas Comptroller’s Office

- Brandon Spanos, Alaska DOR
- Lee Baerlocher, Montana DOR
- Keith Shribbs, Oregon DOR
- Rodney Johnson, Colorado DOR

5:45 P.M. – 9:00p.m.

CLOSING BANQUET

The Bob Bullock Texas State History Museum

Transportation will be provided via bus to and from the museum. First departure from the Sheraton Lobby will be at 5:45 p.m. and will run on a 15 minute loop. Last pickup will be at 6:45 p.m.

Return loop will begin at 8:00 p.m., with the last pickup at 9:00 p.m.

WEDNESDAY, September 26

7:30 a.m. – 8:30 a.m.

Breakfast Buffet

Capitol View Terrace

8:30 a.m. – 8:45 a.m.

General Session

Capitol Ballroom E

Presiding: Mike Reissig, Texas Comptroller’s Office

Closing Remarks & Recognitions

8:45 a.m. – 10:15 a.m.

Implementing Wayfair: Where Are We Now?

Capitol Ballroom E

It has been three months since the Wayfair decision was issued (but it feels like three years). What are the states, taxpayers, and practitioners doing and thinking? We’ll take a deeper dive into implementation issues related to this historic sales tax decision.

Moderator: Nancy Prosser, Texas Comptroller’s Office

- Phil Horwitz, Moss Adams
- Michael Fatale, Massachusetts DOR
- John Valentine, Utah State Tax Commission
- Carolynn Kranz, Kranz & Associates
- William Lasher, eBay

10:15 A.M.

BREAK

10:30 a.m. – Noon

Don't Step on My Face: Bolstering Your Interpersonal Effectiveness

Capitol Ballroom E

What does it take to be more interpersonally effective with others? Why are some people great leaders? Discover specific techniques you can use to build more positive relationships during this interactive and entertaining session by one of UT's favorite business professors. Learn how to bolster trust, better understand others, generate affinity through rewards, use narrative to enhance your professional relationships, and become more optimistic.

Presenter: John Daly, TCB Professor of Management, The University of Texas at Austin McCombs School of Business

Noon

Adjourn