

Morgan Lewis

FIFTH ANNUAL RESEARCH & DEVELOPMENT TAX CREDIT SYMPOSIUM

Thursday, November 21, 2019	Morgan Lewis Silicon Valley 1400 Page Mill Road Palo Alto, CA 94304
8:00 am – 8:30 am	Breakfast and Registration
8:30 am – 9:00 am	Welcome Remarks <i>Morgan Lewis:</i> Alex Sadler and Doug Norton
9:00 am – 10:00 am	Hot Topics & Technical Developments <i>Ernst & Young:</i> David Hudson
10:00 am – 11:00 am	Pilot Models, Section 174 Issues & Supply Costs <i>Alvarez & Marsal Taxand:</i> Kathleen King <i>DST Advisory Group:</i> Diane Stogiannes
11:00 am – 11:15 am	BREAK
11:15 am – 12:15 pm	Claim Types & Impact on Documentation and Audit <i>Crowe LLP:</i> Shelby Ford and Matt Paparella
12:15 pm – 1:15 pm	LUNCH Keynote: The Future of International Taxation of Intangibles and the U.S. Response <i>Morgan Lewis:</i> Bart Bassett and Greg Hartker
1:15 pm – 2:15 pm	Study & Audit Defense Best Practices <i>MASSIE R&D Tax Credits:</i> Peter Green, Colette Gagnet, and Elaine Guan
2:15 pm – 3:15 pm	Industry Spotlights – Tech Industry, Payroll Offset, Auto Industry, Custom Fabrication, Microbreweries, and More <i>Moss Adams:</i> Travis Riley <i>Plante Moran:</i> Julie Peters <i>Wipfli LLP:</i> Valerie Fedie
3:15 pm – 3:30 pm	BREAK
3:30 pm – 4:30 pm	Software Development Credit Opportunities and Potential Pitfalls <i>Tanner:</i> Shawn Marchant <i>alliantgroup LLP:</i> John Dies <i>Best Buy, Inc.:</i> Tim Johnson <i>Morgan Lewis:</i> Tom Linguanti
4:30 pm – 5:30 pm	Thorny Computational Issues and the Post-Tax Reform Credit <i>KPMG:</i> Tony Coughlan <i>Morgan Lewis:</i> Doug Norton
5:30 pm	Book Raffle & Cocktails

Silicon Valley Welcome Dinner (Wednesday, November 20)

- **Opening Presentation: Top 10 Research Credit Cases:** *Morgan Lewis:* Alex Sadler and Doug Norton

Please contact symposium co-chairs [Alex Sadler](#) and [Doug Norton](#), or marketing and communications coordinator [Melissa Chan](#) with any questions.