

Morgan Lewis's 7th Annual R&D Tax Credit Symposium

Monday, November 8, 2021 to Friday, November 12, 2021

Monday, November 8 | 12:00 p.m. – 3:30 p.m. ET
Wednesday, November 10 | 12:00 p.m. – 3:30 p.m. ET
Friday, November 12 | 12:00 p.m. – 3:30 p.m. ET

Recommended CPE Credit and Field of Study:	We anticipate providing 1 hour of CPE per program session for each of the substantive programs (up to 3 hours total per day and up to 8 hours in total) (pending approval), Tax.
Prerequisites:	None
Advance Preparation:	None
Program Level:	Basic
Program Summary:	This symposium focuses on the latest developments impacting the Credit for Increasing Research Activities (Research Credit) under Internal Revenue Code Section 41 and best practices for claiming and documenting the Research Credit and defending Research Credit claims on audit. It is designed for corporate tax directors, tax managers, accountants, and other tax professionals who assist companies that engage in research and development and have Research Credit qualifying activities and cost.

Monday, November 8, 2021 | 12:00 PM-3:30 PM ET

- 1. Hot Topics and Technical Developments**
Alexa Claybon (EY)
- 2. New Section 174 Capitalization Regime**
Doug Norton (Morgan Lewis), Kathleen King (Alvarez & Marsal Taxand), and Shawn Marchant (Tanner)
- 3. Research Trends in Research Credit Cases**
Alex Sadler (Morgan Lewis), Doug Norton (Morgan Lewis), and Devin Hall (Crowe)

Wednesday, November 10, 2021 | 12:00 PM-3:30 PM ET

- 1. Substantial Rights, Trade or Business Requirement, Control Groups, and Other Thorny Technical Issues**
Jeff Moeller (Ivins, Phillips & Barker) and Caitlin Bradley (Andersen)
- 2. In-House Perspectives on Methodology, Documentation, and Audits**
Jason Massie (Massie R&D Tax Credits), Peter Green (Massie R&D Tax Credits), and Michael Keller (Dow)
- 3. State and Local Incentives and Examinations**
Cosimo Zavaglia (Morgan Lewis), Sophia Shah (Crowe), and Joe Stoddard (Eide Bailly)

Friday, November 12, 2021 | 12:00 PM-3:30 PM ET

- 1. Virtual Studies, A.I. Technology, and Appeals Conferences Best Practices**
Jennifer Breen (Morgan Lewis), Sheri Dillon (Morgan Lewis), Mark Andrus (SPRX Technologies), and John Chennoor (DHG)
- 2. Federal Exams and Audit Defense Tactics**
Tom Linguanti (Morgan Lewis), Joe Maselli (PwC), and Christi Schenzel (PwC)
- 3. Faculty Q&A and Wrap-up / Closing Remarks**
Alex Sadler (Morgan Lewis), Doug Norton (Morgan Lewis), Tom Linguanti (Morgan Lewis), Alexa Claybon (EY), Shawn Marchant (Tanner), Kathleen King (Alvarez & Marsal Taxand), and Adam Quattlebaum (DHG)

- Delivery Method:** Group Internet Based (**each attendee must be logged in and answer the poll questions in order to receive CPE credit**)
- Participants:** Corporate tax directors, tax managers, accountants, and other tax professionals who assist companies that engage in research and development and have Research Credit qualifying activities and cost.
- Learning Objectives:** Upon completion of this course you will be able to:
- identify and better understand recent developments impacting the Research Credit
 - identify best practices for assisting companies in claiming and documenting the Research Credit
 - identify best practices for assisting companies in defending Research Credit claims on audit
- Location:** Virtual –
(<https://morganlewis.webex.com/morganlewis/onstage/g.php?PRID=514d546d7704c85460b198c59df3e55a>)
- Registration:** Contact [Melissa Chan](#) to register or register online through [Morgan Lewis](#).
- Policies:** This event is complimentary. Due to this program being offered free of charge, there will be no refunds issued. If you have any questions regarding administrative policies such as registration or cancellation, please contact DHGUCompliance@dhg.com. Please direct any CPE related questions or complaints to DHGUCompliance@dhg.com.

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