

2026 Tax Reporting & Withholding Conference

Monday, May 4 – Wednesday, May 6, 2026

Draft - Subject to Change

MONDAY, MAY 4

TUTORIALS - Sponsored by EY

7:30 a.m. - 5:00 p.m.

Registration

7:30 - 8:30 a.m.

Continental Breakfast

8:30 a.m. - 12:30 p.m.

Morning Tutorial Options:

Option 1:

NRA / FATCA Tutorial

Ryan Blewitt, Ernst & Young LLP

Cyrus Daftary

Overview and refresher of fundamentals related to U.S. withholding tax and information reporting on non-U.S. (foreign) residents:

- Form W-8 validation
- Chapter 3 (NRA) and Chapter 4 (FATCA) withholding and adjustments
- Form 1042-S reporting

Option 2:

Crypto Tutorial

Uri Benjamin, Ernst & Young LLP

Jill Dymtrow, Gemini

Seth Poloner, Ernst & Young LLP

Deep dive into recent and upcoming changes for digital asset reporting (and withholding), including:

- In-Scope brokers and transactions
- Backup withholding tax and transitional relief
- Tax documentation requirements
- Form 1099-DA reporting, including reporting of stablecoin
- CARF

12:30 – 1:00 p.m.

Lunch

1:00 – 5:00 p.m.

Afternoon Tutorial Options:

Option 1:

U.S. / Domestic Tutorial: Form 1099 Reporting and Backup Withholding on U.S. Residents

Jonathan Jackel, Ernst & Young LLP

Susan Segar, Deloitte Tax LLP

Kelli Wooten, KPMG LLP

Key concepts and essentials for Form 1099 reporting and backup withholding tax on U.S. Residents:

- Different types of Forms 1099 and in-scope payments, including new auto loan reporting
- Backup withholding tax (including B Notices)
- Form W-9 requirements
- State Reporting

Option 2:

**Advanced Topics in Information Reporting Tutorial: ECI
Withholding and Unique Form 1099 Reporting**

Ryan Blewitt, Ernst & Young LLP

Tara Ferris, Ernst & Young LLP

ECI withholding tax:

- Withholding on PTPs
- FIRPTA

Unique Form 1099 reporting:

- Derivatives
- Crypto
- Special payments (perks, awards, and rebates)

TUESDAY, MAY 5

7:30 a.m. - 5:00 p.m.	Registration
7:30 - 8:30 a.m.	Continental Breakfast – <i>Sponsored by Deloitte Tax LLP</i>
8:30 - 8:40 a.m.	Welcome and Introductions <i>Erica Fine, Tax Reporting Group LLC</i> <i>David Weisner, Brown Brothers Harriman & Co.</i>
8:40 - 9:40 a.m.	Hot Topics – Domestic and International <i>Danielle Nishida, PwC</i> <i>Susan Segar, Deloitte Tax LLP</i>
9:40 - 10:40 a.m.	Tax Documentation and Best Practices - U.S. & Global <i>Aureon Herron-Hinds, RSM</i> <i>Christopher Liguori, S&P Global Market Intelligence</i>
10:40 - 11:00 a.m.	Refreshment Break
11:00 a.m. - 12:15 p.m.	Audits and Voluntary Disclosures for Forms 1099 & 1042 <i>Tara Ferris, Ernst & Young LLP</i> <i>Peter Larsen, Deloitte Tax LLP</i>
12:15 - 1:35 p.m.	Lunch
1:35 - 2:40 p.m.	How to Conduct an Internal Health Check – Use AI to Find/Fix Errors <i>Cyrus Daftary</i> <i>Christopher Shott, KPMG LLP</i> <i>David Weisner, Brown Brothers Harriman & Co.</i>
2:40 - 3:00 p.m.	Refreshment Break
3:00 - 4:00 p.m.	Major Technologies Shaping Modern Tax Operations – Data Management, ETL Tools, AI, OCR, Workflow, Analytics and Visualization, etc. <i>Scott Nice, Label</i> <i>William Sheridan, S&P Global Market Intelligence</i> <i>Yitzhak Zahavy, eToro</i>
4:00 - 5:00 p.m.	Post Filing Review – Debrief on IRIS, 1042-S e-Filings, 1099 e-Filings, and 1099-DA Reporting <i>Jamila Alkaifi-Hercules, Broadridge Financial Solutions, Inc.</i> <i>Tomer Siegal, Ledgible</i> <i>Wendy Walker, Sovos Compliance, LLC</i>

WEDNESDAY, MAY 6

7:30 - 8:30 a.m.

Continental Breakfast – Sponsored by BetaNXT

8:30 - 8:35 a.m.

Welcome and Introductions

David Weisner, Brown Brothers Harriman & Co.

BREAK-OUT SESSIONS

8:40 - 9:40 a.m.

Salon II:

IRAs, Employer Plans, & HSA Reporting and Updates I

Susan Diehl, PenServ Plan Services, Inc.

Salon III:

Crypto 101

Jessalyn Dean, Ledgible

Jill Dymtrow, Gemini

Erin Fennimore, Taxbit

9:40 – 10:35 a.m.

Salon II:

IRAs, Employer Plans, & HSA Reporting and Updates II

Susan Diehl, PenServ Plan Services, Inc.

Salon III:

Cost Basis Refresher – Traditional Cost Basis Reporting vs. Crypto Cost Basis Reporting

Stevie Conlon, Wolters Kluwer

Jonathan Cutler, Deloitte Tax LLP

10:35 - 10:50 a.m.

Refreshment Break

10:50 a.m. – 12:10 p.m.

Discussion with the IRS on Key Issues

Chip Collins, UBS AG

Laurie Hatten-Boyd, KPMG LLP

Jonathan Jackel, Ernst & Young LLP

Subin Seth, Internal Revenue Service

12:10 - 1:10 p.m.

Lunch – Sponsored by Taxbit

1:10 - 1:55 p.m.

Tax Reporting for Lenders – Updates on Mortgage Interest and Cancellation of Debt Challenges

Ryan Blewitt, Ernst & Young LLP

Karan Mosley, Citi

1:55 – 2:55 p.m.

State Reporting – It's Not Just the IRS Anymore

Gabe Kjeldgaard, Thomson Reuters

Kelli Wooten, KPMG LLP

2:55 - 3:00 p.m.

Conference Wrap-Up