

Agenda
51st National Premium Tax Conference
Reno, Nevada
November 14th – 16th, 2023

*The Steering Committee is pleased to present the 2023 agenda. In response to the changing insurance industry and attendee evaluations, **the format has changed from prior years.***

Please read through this agenda to the end. It may be used to make your travel arrangements.

Questions regarding the 2023 NPTC may be directed to:

*Jan Gillerin, NPTC Conference Coordinator at info@nptcreno.com
Jessica Fahey, 2023 NPTC Committee Chair at jessica.fahey@standard.com
Fran O'Loughlin, 2023 NPTC Agenda Chair at foloughlin@deloitte.com*

*We look forward to seeing you in Reno!
Cordially yours,*

THE STEERING COMMITTEE

*Gene Capobianco Jim Closson Jessica Fahey Josie Lowman James Closson
Lisa McCalla Fran O'Loughlin Mike Palm George Ryan David Sutera
Jerry Malanga*

Monday, November 13th

3:30 pm – 5:00 pm

Registration

6:00 pm - 8:00 pm

Opening Reception

(Your traveling companion is welcome to attend this event.)

Tuesday, November 14th

7:00 am - 8:15 am

Breakfast @ Roxy Restaurant

7:30 am – 4:00 pm

Registration

8:30 am – 9:00 am

Brief Welcome/Conference Announcements

9:00 am – 5:00 pm

Breakout SessionsNew format this year!**

Tier One is suitable for those with less than three years of experience.

Tier Two has been planned for those with more than three years of experience.

	Tier One - Beginner	Tier Two - Advanced
9:00am - 10:30am	What is Insurance? Operations, Products, etc.	Federal tax update & state impact
10:30am - 10:45am	Break	Break
10:45am - 12:15pm	Beginning Premium Tax (including Muni Tax introduction)	Tax Filings for Unauthorized Insurers (Life & P&C)
12:15pm - 1:30pm	Lunch - Roxy Bistro	Lunch - Roxy Bistro
1:45pm - 3:15pm	Beginning Retaliatory Tax	Advanced State Income tax
3:15pm - 3:30pm	Break	Break
3:30 pm - 5:00 pm	Intro to Income & Other State Taxes	Advanced Retaliatory Tax

Wednesday, November 15th

7:00 am - 8:15 am	Breakfast @ Roxy Restaurant
8:15 am – 8:30 am	Conference Announcements
8:30 am –12:00 pm	Life Breakout Session (Includes LHA Roundtable)
8:30 am – 12:00pm	Property Casualty Breakout Session (Includes PC Roundtable)
10:00 am – 10:15 am	Morning Session Break
12:00 pm – 1:15 pm	Lunch @ Roxy Restaurant
1:30 pm – 2:30 pm	Tax Accounting/Provisions/Credits
2:30 pm – 2:45 pm	Break
2:45 pm – 3:30 pm	Tax Department of the Future – Part I
3:30 pm – 3:45 pm	Break
3:45 pm – 5:00 pm	Tax Dept of the Future – Part II Company specifics / demo / discussion
5:30 pm - 7:00 pm	Speakers Reception (This event is for those who are participating as a speaker or panelist.)

Thursday, November 16th

7:00 am – 8:30 am	Breakfast @ Roxy Restaurant
8:30 am – 8:45 am	Conference Announcements
8:45 am – 10:15 am	National Trends
10:15 am – 10:30 am	Break
10:30 am – 12:00 pm	2023 Developments in Legislation and Litigation
12:00 pm – 1:15 pm	Lunch @ Roxy Restaurant
1:30 pm – 3:00 pm	Municipal Taxes
3:00 pm – 3:15 pm	Break
3:15pm – 4:30 pm	Guest Speaker – Not to be Missed!