

Agenda
54th National Premium Tax Conference
Reno, Nevada
November 9-12, 2026

This agenda may be used for travel planning and to review the intended sessions. The NPTC agenda committee, if necessary, may have to rearrange the sessions on Wednesday, November 12 pending speaker availability. Volunteers are needed to prepare and present sessions at the NPTC. If you are interested in contributing to a session by volunteering to be a session speaker or panelist, please email Gerardo_S_Malanga@NewYorkLife.com

The registration fee includes breakfast on Tuesday, Wednesday and Thursday; lunch on Tuesday, Wednesday and Thursday; and the opening reception on Monday evening. Breakfasts and lunches are for registered attendees only. Your 21+ travel companion is welcome at the opening reception.

There is a social event planned for Thursday evening, November 12. All attendees and their 21+ travel companions are welcome.

If you have any questions regarding the 2026 NPTC, please contact Jan Gillerin at gillerinnptc@gmail.com or call 508-335-8273.

Cordially yours,
THE STEERING COMMITTEE

*Gene Capobianco ~ Jim Closson ~ Jessica Fahey ~ Matt Heffernan
Josie Lowman ~ Jerry Malanga ~ Lisa McCalla ~ Fran O'Loughlin ~ Mike Palm
George Ryan*

Monday, November 9th

- | | |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2:30 pm – 5:00 pm | Registration Eldorado Lobby |
| 5:15 pm – 6:00 pm | First-time Attendee Reception
Silver Legacy Grand Expo Hall |
| 6:00 pm – 9:00 pm | Opening Reception for All Attendees and Vendors
Food, Beverages and new this year:
ENTERTAINMENT sponsored by the NPTC vendors!!
(Your 21+ travel companion is welcome at this event)
Silver Legacy Grand Expo Hall |
-

2026 NATIONAL PREMIUM TAX CONFERENCE

Tuesday, November 10th

- 7:00 am – 8:15 am **Buffet Breakfast at the Roxy Restaurant**
- 8:30 am – 10:00 am **Introduction to Premium Tax & Understanding Retaliatory Taxes** *Recommended for accountants with 0-2 years of experience: Hands-On Walkthrough*
- Concurrently** **Terabitten Tax Software Q&A and Demo** This opportunity is for the vendor to show Prema Tax and its features. It is also for you to ask the vendor product specific questions. *Recommended for attendees with 3+ years of experience*
- 10:00 am – 10:15 am **Break**
- 10:15 am – 12:00 pm **Introduction to Premium Tax & Understanding Retaliatory Taxes Continued**
- Concurrently** **TriTech Tax Software Q&A and Demo** - This opportunity is for TriTech to show Stratus and its features. It is also for you to ask the vendor product specific questions. *Recommended for attendees with 3+ years of experience*
- 12:00 pm – 1:15 pm **Buffet Lunch at the Roxy Restaurant**
- 1:30 pm – 1:45 pm **Conference Announcements**
- 1:45 pm – 3:15 pm **2026 Legislative and Litigation Trends Affecting State Insurance Taxes**
- 3:15 pm – 3:30 pm **Break**
- 3:30 pm – 5:00 pm **NAIC/OPTins Overview: History, Processes & Reporting**

2026 NATIONAL PREMIUM TAX CONFERENCE

Wednesday, November 11th

7:00 am - 8:15 am **Buffet Breakfast at the Roxy Restaurant**

Break-out sessions are for attendees of all experience levels

8:30-9:30	60mins	Beginner State Income Tax for Insurers	Municipal Premium Tax Update	Advanced Strategies in Retaliatory Taxes
9:35-10:50	75mins	Back to Basics – Statutory Accounting Refresher: Yellow & Blue Book Essentials	Sales and Use Tax: Key Impacts for Insurers	Hands-On with Microsoft & AI Tools
10:50-11:00	10mins	BREAK		
11:00-12:00	60mins	Municipal Premium Tax Update	Navigating Audits with Practical Guidance	Tax Information Reporting: Common Issues and How to Handle Them
12:00-1:15		Buffet Lunch at the Roxy Restaurant		
1:15-2:15	60 mins	Life Insurance Trends and NOLHGA Access Connect	Property and Casualty Surcharges and FAIR Plan Updates	Advanced Issues in State Income Tax for Insurers
2:15-2:30	15mins	BREAK		
2:30-3:45	75mins	Hands-On with Microsoft & AI Tools	Basics of Tax Credits and Credit Accounting	Tax Accruals and Provision-to-File Fundamentals

4:15 pm – 5:45 pm Speakers Reception: The NPTC Steering Committee thanks the 2026 volunteer speakers and panelists with an invitation to this private event.

2026 NATIONAL PREMIUM TAX CONFERENCE

Thursday, November 12th

7:00 am - 8:15 am	Buffet Breakfast at the Roxy Restaurant
8:30 am – 10:00 am	Industry Deep Dive: Life and P&C Breakouts Life PC
10:00 am – 10:15 am	Break
10:15 am – 11:15 am	Industry Deep Dive: Life and P&C Breakouts (Continued)
11:15 am - 11:30 am	Break
11:30 am-12:30 pm	Industry Deep Dive: Life and P&C Breakouts (Continued)
12:30 pm – 1:45 pm	Buffet Lunch at the Roxy Restaurant
1:45 pm - 3:00 pm	The Political Landscape in Tax: Federal and State Impacts on Insurers
3:00 pm – 3:15 pm	Break
3:15 pm – 4:30 pm	AI Without the Hype: Use Cases, Guardrails, and Tool Choices for State Tax

See you in Reno!

The tradition continues: Thursday evening, TriTech Software and Affordable Equity Partners will host a social gathering at the Novi in the Eldorado. NPTC attendees and 21+ travel companions are welcome at this event. It is a casual way to unwind and network with your NPTC colleagues!