

- HIGHLIGHTS**
- International Financial Reporting Standards and XBRL
 - CFO's Guide to Operations
 - Cross-Border Planning for Individuals
 - Investing in China and India
 - U.S. International Tax Reporting
 - Manufacturing, Sales and Service Operations Abroad
 - The Non-Tax Taxes
 - Transfer Pricing Update

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8:30 AM WELCOME

Sou K. Ho, CPA
Conference Co-Chair
KPMG LLP | Mountain View

Katherine T. Leonard, CPA, MBA
Conference Co-Chair
Kate Leonard, CPA | Del Mar

8:35 AM

International Financial Reporting Standards and XBRL

- Global financial and business reporting convergence
- International Financial Reporting Standards (IFRS)
- Looming SEC mandate for IFRS
 - What does it mean?
 - What will implementation look like?
 - No LIFO with IFRS
 - Tax implications
- Technology solutions—XBRL and other software tools

Kurt P. Ramin, CPA, MBA, CEBS
International Accounting Standards Committee Foundation | London, England

- XBRL—A new era for financial analysis
- SEC plans for XBRL mandate
- Highlights—SEC’s proposed rule for XBRL
- Available XBRL solutions and services

Liv A. Watson
IRIS Business Services | New York, NY

9:35 AM BREAK

9:45 AM CONCURRENT SESSIONS (Choose one)

The CFO’s Guide to Operations

- Managing expats and “impats”
- Treasury issues
 - Managing international cash
- Foreign Corrupt Practices Act
- Payments to foreign persons
- Withholding tax
- Human resource issues
- Related forms

- E-discovery
 - What is it?
 - What am I obligated to do?

Jane M. Adamo, Esq., LLM
SuccessFactors, Inc. | San Mateo

OR

Cross-Border Planning for Individuals

- Individual inbound
 - Immigration
 - Estate tax planning
 - Income tax planning
 - Compliance forms
 - Form 1040NR landmines
- Individual outbound
 - U.S. citizens with money overseas
 - Expatriation
 - Giving up green cards
 - U.S. citizens buying real estate overseas
 - Forms 3520 and 3520-A
 - TDF 90-22.1
 - California residency rules

Philip D. W. Hodgen, Esq., LLM
Hodgen Law Group, PC | Pasadena

In San Francisco:
Charlotte Ito, Esq.
Bryan Cave LLP | San Francisco

In Anaheim:
Lawrence H. Heller, Esq., TEP
Bryan Cave LLP | Santa Monica

11:00 AM

Investing in China and India

- Business considerations—accounting, foreign exchange controls, market entry, hiring of employees
- Tax considerations—tax incentives, direct and indirect tax, permanent establishment
- Investment structure—treaty network, transfer pricing
- Recent developments and trends—market openings, opportunities

India Speaker:
Dharmesh Pandya
KPMG LLP | New York, NY

China Speaker:
Sou K. Ho, CPA
KPMG LLP | Mountain View

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12:00 PM LUNCH - INCLUDED

1:00 PM

U.S. International Tax Reporting

- General overview of inbound
- IRS Forms 1120-F, 5472, W-8 series, etc.
- General overview of outbound
- IRS Forms 5471, 8621, 1118, etc.

John Apuzzo, CPA
Deloitte Tax LLP | Costa Mesa

2:10 PM BREAK

2:20 PM CONCURRENT SESSIONS (Choose One)

Manufacturing, Sales and Service Operations Abroad

- How to take ownership of outbound strategy
- Development of global strategy
- Subpart F manufacturing issues under proposed regs
- Services—2007 Notice
- Use of check the box
- Use of holding companies
- Cost sharing
- Transfer pricing implications
- Selection of location

William K. Norman, Esq., LLM
Ord & Norman | Los Angeles

OR

The Non-Tax Taxes

- Customs
 - Export restrictions: Homeland security and state and commerce departments
 - Customer practice
 - Foreign country import restrictions
 - Product safety, environmental and security issues
- Value added tax (VAT)
 - Political issues
 - Refund rate
 - Timing refunds
 - Impact of SOX—planning opportunities
 - Timing of claims and submission

Susan Kohn Ross, Esq.
Mitchell Silberberg & Knupp LLP | Los Angeles

In San Francisco:
Dave Kibbey
Deloitte Tax LLP | San Jose

In Anaheim:
Sean M. Kane
Deloitte Tax LLP | San Jose

3:30 PM

Transfer Pricing Update

- Recent IRS guidance
- U.S. cost sharing
- FIN48/IFRS
- Selected international developments
 - Canada, India, China and Mexico

Margaret Critzer, CMA
KPMG LLP | Mountain View

In San Francisco:
Tamara Berner Gracon
KPMG LLP | Mountain View

In Anaheim:
Brian Burt
KPMG LLP | Los Angeles

4:35 PM ADJOURN

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CPE: 8 hours
A&A: 1 hour
MCLE: 6.5 hours
Legal Specialization of Taxation Law: 6.5 hours

Level: Update
Prerequisites: None

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