



Tax Reform in New England: Regional Impact and Next Steps

*June 4, 2018
PwC – Boston, MA*

AGENDA

11:30 a.m. **Registration, Networking & Buffet Luncheon**

12:00 p.m. **Welcome Remarks**

John Stadtler
Partner, PwC

James Brett
President & CEO, The New England Council

Keynote Remarks and Q&A

Congressman Richard Neal (D-MA)

Ranking Member – Committee on Ways and Means

1:00 p.m. **Panel Discussion**

Moderator: **Barry Okun**
Partner – Corporate Tax
PwC

Panelists: **Mark Colabella**
Vice President, Enterprise Tax Planning, Compliance, & Defense
Dell

Daniel Egan
President
Association of Independent Colleges & Universities of Rhode Island

Daniel Forte
President
Massachusetts Bankers Association

Kristin Lewis
Senior Vice President, Chief Public Affairs Officer
Tufts Health Plan

Susan R. Olson
Vice President, Government Relations
Natixis Investment Managers

1:45 p.m. Audience Q&A

2:00 p.m. Adjourn



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Panel Biographies

Barry Okun – Lead Corporate Tax Partner, PwC Boston

With over 34 years of experience, Barry is responsible for bringing and delivering global tax resources to PwC clients, primarily servicing them in the health sciences and technology industries. Barry has extensive experience providing tax accounting and tax consulting advice on a wide range of issues to domestic and multinational corporations including mergers & acquisitions, global structuring, accounting methods, equity compensation, international and multistate taxation and compliance. Much of Barry's recent focus has been with Large and Midcap Global Corporations and the unique tax issues they face.

Mark Colabella – Vice President of Enterprise Tax Planning, Compliance and Defense, Dell

Mark is the Vice President of Enterprise Tax Planning, Compliance and Defense at Dell. Through this role, he is responsible for Dell Enterprise and legacy EMC business, a \$25 billion revenue leader in computer storage, software and information life cycle management, Mark leads a team of 20 global employees. His specialties are tax planning, U.S. corporate tax law and mergers and acquisitions. Prior to working for Dell, Mark worked in the tax practices for both Kodak and General Electric.

Daniel Egan – President, AICU Rhode Island

Dan has been the President of AICU Rhode Island since January 2007. He leads AICU Rhode Island efforts in the area of advocacy and consortium activities. Responsible for AICU Rhode Island outreach on the federal, state and local level, Dan represents the collective interests of Rhode Island's independent colleges and universities before numerous external constituencies. Before taking on the role of AICU Rhode Island President, Dan served as chief of staff in the Office of the Dean of Medicine and Biological Sciences in the Division of Biology and Medicine at Brown University.

Daniel Forte – President and CEO, Massachusetts Bankers Association

Dan is President and CEO of the Massachusetts Bankers Association which represents approximately 150 commercial, savings and co-operative banks and savings and loan associations with \$2.2 trillion in assets and 69,000 employees in Massachusetts and New England. Association activities include federal and state legislative/regulatory issues, communications, group insurance, administration/finance, seminars and management development programs, and member products and services. Prior to joining the Association, Dan served as Chief Operating Officer of Management Development at America's Community Banks in Fairfield, Connecticut. He also served as Business Analyst at Citibank, N.A. in New York City.

Kristin Lewis - Senior Vice President and Chief Public Affairs Officer, Tufts Health Plan

Kristin leads Tufts Health Plan's public policy, government and public affairs function, as well as the company's strategy and implementation of state and federal health reforms. With more than 20 years of experience in health insurance and government affairs, Kristin guides Tufts on the impact of public policies, political changes and public relations as it relates to the company's strategic goals and business agenda. She also serves as a key advisor to Tufts leadership team, ensuring the company has an active and effective voice in shaping public policy, and communicating with external audiences in support of the company's efforts to deliver affordable coverage and access to high quality health care.

Susan Olson - Vice President of Government Relations, Natixis Investment Managers

Susan serves as point person for Natixis Investment Managers and helps the firm maintain awareness of the regulatory environment, as well as ongoing governmental issues and initiatives. From 2005 - 2015, she served as Managing Regional Director, IAG Mid-Atlantic on the National Sales Team. Prior to joining the firm in 2005, she was a vice president and regional manager at SunAmerica Mutual Funds covering Kentucky, Ohio, and Indiana. She started in the financial services industry within UBS/PaineWebber in 1995.



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