

# Registration Form

Taxware User Conference 2002  
 Sheraton Boston Hotel - Boston, MA  
 August 25-28, 2002

Three Convenient Ways to Register:

- 1| **Register online** at [www.taxware.com](http://www.taxware.com).
- 2| **Fax** this registration form to: M2 Meeting Management 978.475.1333
- 3| **Mail** this registration form to: M2 Meeting Management  
 c/o Taxware User Group Conference 2002  
 305 North Main St.  
 Suite 203  
 Andover, MA 01810

Attendee Information - Please Print Clearly

Please fill out completely to ensure correct information for mailing of confirmation. A separate form must be completed for each attendee. **You must make copies of this registration form.**

Attendee's First Name (as you wish it to appear on badge)

Attendee's Last Name

Title

Company Name

Attendee's Address Suite/Room/Mail Stop

City State/Province ZIP/Postal Code Country

Phone Fax E-Mail

Registration Fee Deadlines - On or Before Friday, July 12, 2002

Early Registration Fee	Fee	Amount
Per Person	\$595	\$ _____

Regular Rate After Friday, July 12, 2002

Regular Registration Fee	Fee	Amount
Per Person	\$695	\$ _____

**Attending Spouse/Guest \$150** \$ \_\_\_\_\_

(Evening Food and Beverage Functions Only)

Spouse/Guest Name

**TOTAL DUE** \$ \_\_\_\_\_

Enclosed is a company check: **(Made payable to M2 Meeting Management)**

Please bill My:  Visa  MasterCard  American Express

Card Holder's Signature Exp. Date /

Print Name (as it appears on the card)

Credit Card Billing Address (if different from above) Suite/Room/Mail Stop

City State/Province ZIP/Postal Code Country

Permit #  
Etc  
Etc

Taxware User Conference 2002  
 Sheraton Boston Hotel - Boston, MA  
 August 25-28, 2002



27 Congress Street  
 Salem, MA 01970 USA

**in-no-va-tion**  
 (in'no-vā'shen)ŋ

1. Something new or different introduced  
 2. The act of introducing something new; introduction of new things or methods

# Taxware User Conference 2002



# Innovation

Sheraton Boston Hotel - Boston, MA  
 August 25-28, 2002

### Featured Speakers From

Bennet Jones	First Data Corporation	Oracle
Deloitte & Touche	KPMG	PriceWaterhouseCoopers
Ducharme, McMillen & Associates, Inc.	North Carolina Department of Revenue	TaxAutomation
Ernst & Young		Wisconsin Department of Revenue

### Corporate Sponsors & Exhibitors



**New! One-on-One Technical Consultations**

See page 6 for more details!

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**Who Should Attend?**  
 Tax, Financial and IS Professionals, Information Technologists and Corporate Executives from a broad spectrum of business and industry all benefit from attending this comprehensive conference.

Welcome from the President

I am pleased to invite you to attend the 2002 Taxware User Conference. Based on your feedback from previous Conferences, we have put together an agenda filled with up-to-date information you can put to work back at the office.

Since becoming part of govONE Solutions last year, Taxware has continued to grow and develop the best-of-breed software you depend upon every day. govONE Solutions and Taxware together have more than 35 years of combined experience in payment, tax and other transaction services. By providing its customers with global tax compliance systems that combine tax data and logic for thousands of jurisdictions with state-of-the-art technology, Taxware is a worldwide market leader in transaction-based commercial tax software.

**Innovation**

Innovation is the driving force behind Taxware and the theme of this conference. The entire Taxware team is hard at work delivering new solutions to meet the changing needs of our users. Our product management team will be on hand to give you insight to the future innovations in development at Taxware.

During this year's conference you will have the opportunity to:

- Network with fellow professionals and tax experts
- Have your individual questions answered by Taxware technical experts
- Meet with exhibitors and learn about their latest product offerings and services

Please join us for what is sure to be the most productive and innovative tax conference of the year. I look forward to seeing you in Boston.

Best Regards,



Michael W. Mancinelli  
 President  
 Taxware, a division of govONE Solutions

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7:30 - 8:30am	Continental Breakfast		
	<b>Topical Sessions</b>	<b>SAP User Sessions</b>	<b>Oracle User Sessions</b>
8:30 - 9:30am	<b>Exemptions - Pitfalls and Planning</b> <ul style="list-style-type: none"> <li>• Jeff Ward – Tax Counsel, U.S. Tax Research Department, Taxware</li> <li>• Rhonda Cozier – Tax Counsel, U.S. Tax Research Department, Taxware</li> </ul>	<b>Maximizing Your Investment in SAP/Taxware Systems</b> <ul style="list-style-type: none"> <li>• Dietmar Hinz – President, TaxAutomation</li> </ul>	<b>Utilizing Taxware to Automate Sales and Use Tax in an Oracle Environment</b> <ul style="list-style-type: none"> <li>• John C. (Skip) Sherrill, Jr. – Manager, National Tax Management Advisory Services, Deloitte &amp; Touche</li> <li>• Jeff Cohen – Alliance Management - Professional Services, Taxware</li> </ul>
9:45 - 10:45am	<b>Taxware - The Next Generation</b> <ul style="list-style-type: none"> <li>• David Decker – Vice President, Development, Taxware</li> <li>• Chris Eveleigh – Product Manager, Taxware</li> <li>• Christopher Hutter Patterson – Director of Product Management, Taxware</li> </ul>	<b>Session to be announced</b> Check the Taxware Web site for the latest Conference updates.	<b>The New World of Online Web Stores and Online Business Management Applications</b> <ul style="list-style-type: none"> <li>• Marco ten Vaanholt – Group Business Manager, Oracle</li> </ul>
11:00am-12:00pm	<b>Session to be announced</b> Check the Taxware Web site for the latest Conference updates.	<b>Session to be announced</b> Check the Taxware Web site for the latest Conference updates.	<b>Session to be announced</b> Check the Taxware Web site for the latest Conference updates.

CPE Credits

Taxware, a division of govONE Solutions, is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Telephone: 615.880.4200. This is an intermediate level live course and does not require any prerequisites or advance preparation. Recommended CPE Credit Hours: 12



FOLD ALONG DOTTED LINE AND TAPE BOTTOM TO CLOSE.

Session Sign Up

Please indicate which sessions you will be attending with an "X" in each designated box below. Include this form with your registration information if you are faxing or mailing your registration form.

**Sunday, August 25, 2002**  
 Event – Duck Tours

**Monday, August 26, 2002**  
 Topical Sessions  
 Automated Tax Collection in the U.S.; The SSTP

Product Sessions  
 Expanding Your Business in Latin America – Indirect Taxes in Latin America

Product Sessions  
 Expanding Your Business in Asia/Pacific Including China – Indirect Taxes in Asia-Pacific

Product Sessions  
 Expanding Your Business in Latin America

Product Sessions  
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 Expanding Your Business in Latin America

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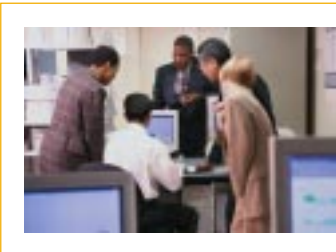
TAPE HERE

8:00 - 9:30am	Continental Breakfast and Exhibit Viewing	
	<b>Topical Sessions</b>	<b>Product Sessions</b>
9:30 - 10:30am	<b>Evolving eGovernment and Tax Administration</b> <ul style="list-style-type: none"> <li>Torsten Fetzer – Director, International Tax Research, Taxware</li> <li>Naomi Dalzell Martinez, Esq. – International Tax Counsel, Research Lead, Taxware</li> </ul>	<b>WorldTax System for New Users</b> <ul style="list-style-type: none"> <li>Karen Palleschi – Instructional Designer and Trainer, Taxware</li> <li>Torsten Fetzer – Director, International Tax Research, Taxware</li> </ul>
10:45 - 11:45am	<b>Determining Nexus in an eCommerce Environment</b> <ul style="list-style-type: none"> <li>Elaine Bialczak – General Tax Counsel, Ducharme, McMillan &amp; Associates</li> </ul>	<b>Sales/Use Tax System for New Users</b> <ul style="list-style-type: none"> <li>John Ardagna – Director of Education and Customer Service, Taxware</li> <li>Karen Palleschi – Instructional Designer and Trainer, Taxware</li> </ul>
11:45am - 1:15pm	<b>Lunch &amp; Exhibit Viewing</b>	
1:15 - 2:15pm	<b>Sales Tax Planning Opportunities in an Automated Tax Environment</b> <ul style="list-style-type: none"> <li>Jeremiah T. Lynch – National Director of Sales/Use Tax Services, Ernst &amp; Young LLP</li> </ul>	<b>Planning for Your Taxware Integration or Upgrade</b> <ul style="list-style-type: none"> <li>Jeff Cohen – Alliance Management - Professional Services, Taxware</li> <li>Moe Turcotte – Sr. Manager, Technical Support, Taxware</li> </ul>
2:45 - 3:45pm	<b>Current Issues in Digital Goods</b> <ul style="list-style-type: none"> <li>Bernie Rothman – Senior Vice President, First Data Corp.</li> <li>Torsten Fetzer – Director, International Tax Research, Taxware</li> </ul>	<b>Compliance – Returns Made Easy</b> <ul style="list-style-type: none"> <li>Chuck Rosselli – Product Manager, Taxware</li> <li>Jollyin Thakkar – Lead Developer, Taxware</li> <li>Bryan Sweeney – Supervisor, Tax Reporting and Compliance, Taxware</li> </ul>
4:00 - 5:00pm	<b>Sales Tax Holidays: Current Impact/Future Outlook</b> <ul style="list-style-type: none"> <li>Lisa C. Johnson – Tax Counsel, U.S. Tax Research Department, Taxware</li> <li>Michelle Sadova – Tax Counsel, U.S. Tax Research Department, Taxware</li> </ul>	<b>Maintaining Taxware Systems</b> <ul style="list-style-type: none"> <li>Moe Turcotte – Sr. Manager, Technical Support, Taxware</li> <li>Todd Nelson – Manager, Technical Support, Taxware</li> </ul>

NO  
USE

**New! Technical Room Consultation** — — — — —>

For the first time, you will be able to sit down one-on-one with a Taxware technical support expert and have your questions answered in-person. Workstations will be set up so that you can get to the root of the issue. Our technical support staff is looking forward to meeting you!



Brief 20-30 minute consultations will be available throughout the conference. Sign-ups will be available on site and will be on a first-come, first-served basis.



39 Dalton Street  
Boston, MA 02199  
T 617.236.2000  
F 617.236.1702

Taxware's User Conference 2002 will be held at New England's largest hotel, the newly renovated 1181-room

Sheraton Boston Hotel. Just three miles from Logan International Airport, the hotel is minutes away from shopping, theater, restaurants and cultural attractions. As the country's eighth largest city, Boston boasts a wealth of historic landmarks in a dynamic cultural setting. The Freedom Trail, Old North Church, Paul Revere's House, and Faneuil Hall Marketplace are just a few of the symbols of this city's rich and varied history. Centrally located in Back Bay, the Sheraton Boston Hotel is just a few steps from Prudential Center shopping, the unique galleries and boutiques of Newbury Street and the elegant shops in Copley Place. Symphony Hall, the Theater District, the Museum of Fine Arts, Fenway Park and Beacon Hill are just some of the rich cultural attractions Boston has to offer. You'll find Boston is one of the most fascinating and historic metropolitan areas you'll ever visit!



**Important Dates & Information to Remember**

<b>Early Registration</b> (\$595)	On or before Friday, July 12, 2002
<b>Regular Registration</b> (\$695)	After Friday, July 12, 2002
<b>Registration Deadline</b>	Wednesday, August 16, 2002

<b>Sheraton Boston Hotel</b>	T 800.325.3535 or 617.236.2000
Check-in time	3:00 PM
Check-out time	12:00 NOON

<b>Taxware 2002 Hotel Room Rate</b>	\$189/single or double occupancy
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<b>Hotel Reservation Cut-off Date</b>	Thursday, July 25, 2002
This is the last day to be assured of a hotel room at the special conference rate of \$189. The Sheraton Boston Hotel will continue to accept reservations from attendees after this date at rates then publicly available, subject to availability.	



**in-no-va-tion**

(in'ə-vā'shən) *n.*

1. Something new or different introduced 2. The act of introducing something new; introduction of new things or methods

Sunday, August 25, 2002

- 10:00am Duck Tours
- 5:00-7:00pm Registration, Hors D'oeuvres, Cocktail Reception & Exhibit Viewing

Monday, August 26, 2002

- 7:00am Registration & Continental Breakfast
- 8:30am Opening Remarks and Keynote Address



Part bus tour and part amusement ride, this 80-minute amphibious trip through the city is a hoot. See Boston by land and water in this unique, authentic, renovated World War II amphibious landing vehicle. The Duck travels through historic sites in Back Bay, Beacon Hill, downtown Boston, and the North End. The big splashdown is in the Charles River, where passengers enjoy a 30-minute cruise. Reservations are on a first-come, first-served basis.

	Topical Sessions	International Sessions	Product Sessions	Product Sessions (continued)
9:30 - 10:30am	<b>Automated Tax Collection in the U.S.: The Streamlined Sales Tax Project</b> <ul style="list-style-type: none"> <li>Jon Abolins – Vice President Tax and Government Affairs, Taxware</li> <li>Charles D. Collins, Jr. – Director, Sales and Use Tax Division, North Carolina State Department of Revenue</li> <li>Diane Hardt – Administrator of Division of Income, Sales and Excise Taxes, Wisconsin Department of Revenue</li> </ul>	<b>Expanding Your Business in Canada – GST and Provincial Sales Taxes in Canada</b> <ul style="list-style-type: none"> <li>Prashant Kamalapuram – International Tax Counsel, Tax and Government Affairs, Taxware</li> <li>Steven D'Arcy – Partner, Tax, Bennet Jones</li> </ul>	<b>Sales/Use Tax System for New Users</b> <ul style="list-style-type: none"> <li>John Ardagna – Director of Education and Customer Service, Taxware</li> <li>Karen Palleschi – Instructional Designer and Trainer, Taxware</li> </ul>	
10:45 - 11:45am	<b>Managing the Sales and Use Tax Function in a Multi-tiered Business Environment</b> <ul style="list-style-type: none"> <li>Robert Polansky – Director, U.S. Tax Research Department, Taxware</li> <li>Jackie McCallum – Senior Tax Analyst, U.S. Tax Research Department, Taxware</li> </ul>	<b>Expanding Your Business in the European Union – VAT in Europe</b> <ul style="list-style-type: none"> <li>Judith M. Freedman, Esq. – International Tax Counsel, Tax and Government Affairs, Taxware</li> <li>Victor Gladun – Analyst, International Tax Research, Taxware</li> </ul>	<b>WorldTax System for New Users</b> <ul style="list-style-type: none"> <li>Karen Palleschi – Instructional Designer and Trainer, Taxware</li> <li>Ying Chen – Senior International Tax Analyst, Tax &amp; Government Affairs, Taxware</li> </ul>	<b>STEP - Managing Exemptions and Exceptions</b> <ul style="list-style-type: none"> <li>Karen Palleschi – Instructional Designer and Trainer, Taxware</li> <li>Tony Turner – Principle, TaxAutomation</li> </ul>
11:45am - 1:15pm	<b>Lunch &amp; Exhibit Viewing</b>			
1:15 - 2:15pm	<b>Integrating Organizational Change in a Post-Implementation Environment</b> <ul style="list-style-type: none"> <li>Joe McIlvaine – General Tax Counsel, DuCharme, McMillan &amp; Associates</li> </ul>	<b>Automated Tax Collection Around the World: The OECD Digital Services Project</b> <ul style="list-style-type: none"> <li>Jon Abolins – Vice President, Tax and Government Affairs, Taxware</li> </ul>	<b>Maintaining Taxware Systems</b> <ul style="list-style-type: none"> <li>Moe Turcotte – Sr. Manager, Technical Support, Taxware</li> <li>Todd Nelson – Manager, Technical Support, Taxware</li> </ul>	
2:45 - 3:45pm	<b>eMarketplaces and eProcurement</b> <ul style="list-style-type: none"> <li>Jeff Cohen – Alliance Management - Professional Services, Taxware</li> <li>Debbie Hedrick – Sr. Tax Manager, Deloitte &amp; Touche</li> </ul>	<b>Expanding Your Business in Latin America – Indirect Taxes in Latin America</b> <ul style="list-style-type: none"> <li>Naomi Dalzell Martinez, Esq., International Tax Counsel, Research Lead</li> <li>Tom Boniface, Director, International Value Added Tax Center, KPMG</li> </ul>	<b>Compliance – Returns Made Easy</b> <ul style="list-style-type: none"> <li>Chuck Rosselli – Product Manager, Taxware</li> <li>Jollyin Thakkar – Lead Developer, Taxware</li> <li>Bryan Sweeney – Supervisor, Tax Reporting and Compliance, Taxware</li> </ul>	
4:00 - 5:00pm	<b>Taxware in the Retail/POS Market Segment</b> <ul style="list-style-type: none"> <li>Chuck Rosselli – Product Manager, Taxware</li> <li>Bruce Reed – Vice President, North American Sales, Taxware</li> </ul>	<b>Expanding Your Business in Asia/Pacific Including China – Indirect Taxes in Asia-Pacific</b> <ul style="list-style-type: none"> <li>Ying Chen – Senior International Tax Analyst, Tax &amp; Government Affairs, Taxware</li> </ul>	<b>Taxware – The Next Generation</b> <ul style="list-style-type: none"> <li>David Decker – Vice President, Development, Taxware</li> <li>Chris Eveleigh – Product Manager, Taxware</li> <li>Christopher Hutter Patterson – Director of Product Management, Taxware</li> </ul>	

- 5:00 - 7:00pm Cocktails and Exhibit Viewing
  - 7:00-9:00pm **Dinner and Entertainment with Comedian Jimmy Tingle**
- "Jimmy Tingle's one man show doesn't capitalize on political crisis; instead his uplifting Uncommon Sense draws honest laughs."- Chuck Crisfulli, Los Angeles Times  
 Jimmy most recently completed two seasons with **60 Minutes II** as the commentator/ humorist in the Andy Rooney spot. His brand of humor is clean, funny, and intelligent.



The **New York Times** wrote of his one-man show Jimmy Tingle's Uncommon Sense. "He is more than comic wit... so cheerfully intelligent he makes his audience optimistic in the face of reality." – The **Los Angeles Times** added that Uncommon Sense was "a thoroughly invigorating and uplifting experience. "Deeply funny... Powerful sentiment... triumphant laughs."

