

# National Intertribal Tax Alliance 21<sup>st</sup> Annual Tax Conference Agenda

## Pre-Conference Activities - Tuesday, August 13th

9:00am-3:00pm **SPECIAL TRAINING SESSION – BUILDING A SUCCESSFUL TRIBAL INVESTMENT CLIMATE**

**Moderator:** Bruce Zimmerman, Tax Administrator, Umatilla Indian Reservation

**Speakers:** A special training workshop for Tribal leaders and Tribal tax administrators provided by the Tulo Centre of Indigenous Economics (*includes catered lunch; add'l registration fee applies*)

5:30-6:30pm **Conference Pre-Registration**

6:00-7:30pm **Welcome Reception**

## Day 1 – Wednesday, August 14th

7:30-8:00am **REGISTRATION AND CONTINENTAL BREAKFAST**

8:00-8:30am **WELCOME AND OPENING ACTIVITIES**

**Honor Song and Opening Prayer – Governor Joseph Talachy, Pueblo of Pojoaque**

**Welcome and Opening Remarks – Mary Mashunkashey, NITA Chair, Executive Director, Seminole Nation of Oklahoma Business Corporate & Regulatory Commission**

**Welcome Remarks (video) – Congresswoman Deb Haaland**

8:30-9:00am **General Session 1 – UNDERSTANDING SOCIAL SECURITY BENEFITS FOR TRIBAL MEMBERS**

**Speaker:** Renee Ferguson, Assistant Regional Commissioner, Social Security Administration, Dallas Regional Office

9:00-10:00am **General Session 2 – LITIGATION UPDATE**

**Moderator:** Brenda J. Bellonger, SWO Tax Director/Attorney, Sisseton Wahpeton Sioux Tribe

**Speaker:** Rob Roy Smith, Partner, Kilpatrick Townsend & Stockton LLP

10:00-10:15am **BREAK**

10:15-11:15am **General Session 3 – FEDERAL LEGISLATIVE AND ADMINISTRATIVE UPDATE**

**Moderator:** Ken Parsons, Partner, Holland & Knight

**Speakers:** Derrick Beetso, General Counsel, National Congress of American Indians; Emery Real Bird, Financial Management Policy Specialist, Native American Finance Officers Association

**Draft – 7-2-2019**

|                     |   |
|---------------------|---|
| <b>11:15am-Noon</b> | <b>General Session 4 -- IRS UPDATE</b>  |
| <b>Moderator:</b>   | <b>Wendy Pearson</b> , Of Counsel, Hobbs Straus Dean & Walker, LLP  |
| <b>Speakers:</b>    | <b>Christie Jacobs</b> , Director, IRS Indian Tribal Governments/Tax Exempt Bonds Division; <b>Telly J. Meier</b> , Field Operations Manager, IRS Indian Tribal Governments/Tax Exempt Bonds Division   |
| <b>12:00-1:15pm</b> | <b>CATERED LUNCH – Special Guest Rep. Ruth Buffalo, North Dakota State Legislature</b><br><b>Honoring Christie Jacobs</b> , Director, IRS Indian Tribal Governments/Tax Exempt Bonds Div.   |
| <b>1:15-2:30pm</b>  | <b>General Session 5 – GAMING TAX &amp; AUDIT ISSUES</b>  |
| <b>Moderator:</b>   | <b>Kelly Croman</b> , General Counsel, Marine View Ventures, Inc.   |
| <b>Speakers:</b>    | <b>Jonodev O. Chaudhuri</b> , Indian Law & Policy Chair, Quarles & Brady LLP; <b>Jill Kelley</b> , General Counsel, Pointsbet USA, Inc.; <b>Wendy Pearson</b> , Of Counsel, Hobbs Straus Dean & Walker, LLP   |
| <b>2:30-3:45pm</b>  | <b>General Session 6 – WORKING EFFECTIVELY WITH STATE &amp; LOCAL TAX AGENCIES</b>  |
| <b>Moderator:</b>   | <b>Kara Briggs</b> , Tribal Liaison, Washington State Department of Revenue   |
| <b>Speakers:</b>    | <b>Joshuah Marshall</b> , Senior Policy Analyst/State Fiscal Policy, Center on Budget and Policy Priorities; <b>Chris Deschene</b> , Deschene LLC; <b>David Flute</b> , Secretary of Tribal Relations, State of South Dakota                          |
| <b>3:45-4:00pm</b>  | <b>BREAK</b>  |
| <b>4:00-5:15pm</b>  | <b>Breakout Sessions – A, B or C</b>  |
|                     | <b>Breakout Session A – OPPORTUNITY ZONES</b>   |
| <b>Moderator:</b>   | <b>Kathleen Nilles</b> , NITA Board Member Emeritus   |
| <b>Speakers:</b>    | <b>Telly J. Meier</b> , Field Operations Manager, IRS Indian Tribal Governments/Tax Exempt Bonds Division   |
|                     | <b>Breakout Session B – GOVERNMENT TO GOVERNMENT RELATIONS – CREATING STABILITY FOR TRIBAL ECONOMIC DEVELOPMENT</b>   |
| <b>Moderator:</b>   | <b>James Rivera</b> , Chairman, Pueblo of Pojoaque Tax Commission   |
| <b>Speakers:</b>    | <b>Carolyn Abeita</b> , Partner, VanAmberg, Rogers, Yepa, Abeita & Gomez; <b>John Monforte</b> , Attorney; <b>Darrell Felipe</b> , TERO Manager, Acoma Pueblo   |
|                     | <b>Breakout Session C – TERO FOR TAX COMMISSIONERS</b>  |
| <b>Moderator:</b>   | <b>Mary Mashunkashey</b> , NITA Chair, Executive Director, Seminole Nation of Oklahoma Business Corporate & Regulatory Commission   |
| <b>Speakers:</b>    | <b>Kelcey Packineau</b> , MHA TERO Special Projects & Commission Liaison, <b>Charles Foote</b> , MHA TERO Director, <b>Mary Mashunkashey</b> , NITA Chair, Executive Director, Seminole Nation of Oklahoma Business Corporate & Regulatory Commission |
| <b>6:00-8:00pm</b>  | <b>BANQUET &amp; CULTURAL PERFORMANCE</b>   |

## Day 2 – Thursday, August 15th

7:30-8:00am CONTINENTAL BREAKFAST

8:00-8:15am OPENING REMARKS

**Speaker:** **Mary Mashunkashey**, NITA Chair, Executive Director, Seminole Nation of Oklahoma Business Corporate & Regulatory Commission

8:15-9:45am *General Session 7 – SALES TAX AND OTHER DOUBLE TAXATION ISSUES*

**Moderator:** **Bruce Zimmerman**, Tax Administrator, Umatilla Indian Reservation

**Speakers:** **Adam Weintraub**, Partner, Savage O'Donnell Affeldt Weintraub & Johnson (*Creek Nation case*); **Rob Roy Smith**, Partner, Kilpatrick Townsend & Stockton LLP (*Agua Caliente case*); **Davis Washines**, Chairman, Yakama Nation General Council (*invited*) and **Mathew L. Harrington**, Shareholder, Stokes Lawrence, P.S. (*Cougar Den case*)

9:45-10:30am *General Session 8 – CANNABIS ISSUES UPDATE*

**Moderator:** **Aubrey Seffernick**, Partner, Miller Nash Graham & Dunn

**Speakers:** **Christine Masse**, Partner, Miller Nash Graham & Dunn; **Edward (Ted) J. Kelleher**, Attorney, Drummond Woodsum

10:30-10:45am BREAK

10:45-11:45am *General Session 9 – RETIREMENT ISSUES FOR TRIBAL EMPLOYEES AND COUNCIL MEMBERS*

**Moderator:** **Wendy Pearson**, Of Counsel, Hobbs Straus Dean & Walker, LLP

**Speakers:** **Catherine Langford**, Partner, Yoder & Langford, P.C.; **Dale White**, General Counsel, Saint Regis Mohawk Tribe

11:45-12:45m LUNCH ON YOUR OWN

12:45-1:45pm *General Session 10 – GAMING REVENUE DISTRIBUTIONS TO MINORS AND STUDENTS (KIDDIE TAX)*

**Moderator:** **Wendy Pearson**, Of Counsel, Hobbs Straus Dean & Walker, LLP

**Speakers:** **Mary Streitz**, Partner, Dorsey & Whitney LLP; **Ken Parsons**, Partner, Holland & Knight

1:45-2:15pm *General Session 11 – UPDATE FROM THE OFFICE OF SPECIAL TRUSTEE*

**Moderator:** **Sharon Swebston**, Tax Administrator, Cherokee Tribe of Oklahoma

**Speaker:** **Pamela Jurgensen**, Director, Trust Fund Investments, U.S. Department of the Interior

2:15-2:45pm CLOSING PRAYER AND WRAP UP

**Draft – 7-2-2019**



***Thank you for supporting the National Intertribal Tax Alliance!***