

Dbriefs

Program Guide
July–September 2009

Stay connected
Webcast series
for executives



Deloitte.

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About Dbriefs

Staying connected to all the latest issues and strategies is a challenge. That's why Deloitte offers Dbriefs, live webcasts that give you valuable insights on important developments affecting your business.

Dbriefs features topical series that are:

- Informative, with a variety of timely, relevant business topics aimed at an executive-level audience.
- Interactive, with immediate and measurable feedback through polls and surveys, including real-time benchmarking with your peers.
- Convenient, one to two hour live webcasts in the comfort of your own office.
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Gain practical knowledge from leading Deloitte practitioners.



Technology Executives

Host: Mark White

Technology Innovation or Optimization: Vicious Circle or Virtuous Cycle?

> July 9, 2:00 PM EDT

Presenters: John Kao, Seth Siegel, and Doug Standley

The mandate to innovate is a universal call across businesses. Yet how many companies achieve true technology-supported innovation when they are so focused on cost reduction? We'll discuss:

- Why technology innovation and optimization clash, including poor awareness of emerging trends, executive misalignment, and overcommitment to existing business models.
- Chicken or egg – strategies for freeing up capital to advance the innovation agenda without degrading enterprise performance.
- Distinguishing incremental improvements from true innovation and ways to move quickly from inspiration and incubation to scale and achievement.

Learn ways to balance the need to unlock your innovators while addressing pressures to boost performance.

Back to the ERP Future – How Services Thinking and Information Integration Are Transforming Enterprise Package Solution

> August 6, 2:00 PM EDT

Presenters: Larry Calabro and Os Mata

Enterprise platforms are enjoying a rebirth, but with a focus on agility and innovation instead of standardized processes. How can you capture the value of this approach? We'll discuss:

- The strategic shift in major ERP vendors – what's real versus hype and why you should care.
- How the new best of breed approach can help realize unfulfilled promises of past implementations, especially around information.
- Beyond technology – the value of a services mindset driven by customer and shareholder value.

Learn about a provocative new way of thinking about ERP and ways to focus transformation efforts on your real goals, not just an ERP package.

Competing in the Low-Carbon Economy – The Essential Dialog between the CIO and the C-Suite

> September 3, 2:00 PM EDT

Presenters: Lynda Pak, John Winstanley Manchester, and Sam Knox, CFO Enterprises

First-wave green IT investments typically focused on energy management. What will the next wave require and how can the C-suite respond? We'll discuss:

- Why green IT isn't just a CIO issue – how IT generates two percent of the carbon footprint but can influence management of the other 98 percent.
- The advent of global carbon regulations – you can only manage effectively what you measure properly.
- A holistic framework, including tax and risk management, which drives green IT value.

Hear results of research about green IT by CFO Enterprises and Deloitte, and how a common language in the C-suite can benefit your organization.

Dig deeper



Learn how Fortune 1000 companies are employing Green IT strategies.

To access this report, visit:

www.deloitte.com/us/nextwaveofgreenit

Financial Executives

Corporate Governance

Host: Ray Lewis

The Latest Trends in Corporate Governance

> July 8, 2:00 PM EDT

Presenters: Maureen Errity and Subodh Mishra, RiskMetrics Group

The economic downturn has moved corporate governance news to the front page, and board practices are being challenged more intensely. With questions coming from influential shareholders and regulators, what significant changes may be underway? We'll discuss:

- Board independence, board leadership, classified boards, board committees, and board diversity, meetings, and elections.
- How directors are responding to greater workloads.
- The latest governance trends and an early review of the 2009 proxy season.

Learn what issues are emerging from this proxy season and the potential implications to your organization for next season.

Providing Earnings Guidance to Investors: The Latest Perspectives

> August 5, 2:00 PM EDT

Presenters: Robert Kueppers; Marie Hollein, President and CEO of Financial Executives International; and Jeff Morgan, President and CEO of National Investor Relations Institute

The practice of providing forward-looking earnings targets to analysts continues to come under scrutiny. Does the pressure to meet these earnings targets distract management from achieving long-term goals? We'll discuss:

- The frequency and type of information companies provide to the analyst community.
- Factors companies may consider about the forward-looking information they provide to analysts.
- Results from interviews with top management on guidance information.

Learn why some companies are rethinking the practice of providing earnings guidance to analysts and the impact this trend may have on their assessments of company performance.

Independent Leadership: The Role of the Non-Executive Chairman

> September 2, 2:00 PM EDT

Presenters: Steve Alogna and Stephen Davis, Senior Fellow, Millstein Center for Corporate Governance and Performance

Countries outside of the U.S. have successfully adopted a corporate governance model of independent chairmanship. What are the potential benefits to a default model of governance where the chairman and CEO are not one in the same? We'll discuss:

- The findings from a group of non-executive chairmen convened to explore the practical applications of independent chairmanship.
- Pros and cons of splitting the positions of the chairman and CEO.
- Recent trends and driving forces in the U.S. and internationally that are influencing the adoption of this model.

Learn about practical considerations for adopting a model of independent chairmanship.

Financial Reporting

Host: Bob Uhl

IFRS: A Deeper Dive into Revenue Recognition and Derecognition

> July 29, 2:00 – 3:30 PM EDT

Presenters: Trevor Farber, Stephen McKinney, and Randall Sogoloff

Standard setters and the SEC remain very active on the IFRS front. Keeping up with the changes related to the adoption of International Financial Accounting Standards can help determine the path forward. What might you need to know to plan for a possible conversion? We'll discuss:

- A regulatory update on IFRS developments including a summary of responses to the SEC's proposed IFRS roadmap.
- Possible future SEC action following the end of the comment period on proposed roadmap.
- Revenue recognition and derecognition proposals and key accounting differences between U.S. GAAP and IFRS related to each.

Gain a better understanding of recent regulatory and standard setting developments.

EITF Roundup: Highlights of the September Meeting

> September 15, 2:00 – 3:30 PM EDT

Presenters: Jason Embick and Rich Paul

The FASB's Emerging Issues Task Force (EITF) will meet in September to review emerging issues. We'll discuss the results of this meeting, which we expect will include:

- Issues not resolved at the June 2009 meeting.
- Additional issues added to the EITF agenda.

Stay in touch with new accounting guidance and potential future guidance resulting from the deliberations of the EITF.

Quarterly Accounting Roundup: An Update of Important Developments

> September 30, 2:00 – 3:30 PM EDT

Presenter: Robin Kramer

Do you know what issues the standard-setters and regulators have been addressing lately? We've been monitoring their projects and will discuss:

- Quarterly update of accounting developments.
- Recent positions of the FASB and SEC staffs.
- Other hot topics.

Join us to hear about the latest developments.

Financial Executives

Transactions & Business Events

Host: David Williams

E-Discovery and Early Case Assessment: Considerations for Cost Effective Litigation

> July 15, 2:00 PM EDT

Presenters: Benton Armstrong and Andy Ruckman

In litigation, early case assessment is the upfront process of identifying key facts and information, analyzing case merits, and setting courses of action. With time-sensitive litigation matters, how can companies leverage a new generation of data-mining tools to quickly evaluate available data and decide whether to pursue limited or broad discovery? We'll discuss:

- The importance of identifying relevant information that should be easily accessible.
- Early case assessment tools and leading practices.
- How early case assessment tools can prepare counsel and lead to cost reductions.

Learn how predetermining and assessing your possible discovery needs may lead to less costly litigation proceedings down the road.

Corruption, Fraud, and Economic Sanctions: The Role of Compliance and Integrity Due Diligence in M&A Decision-Making

> August 12, 2:00 PM EDT

Presenters: Chris Ruggeri and Clint Stinger

Even in a struggling economy, global companies look to emerging markets for growth opportunities. However, economic and business pressures can lead to increased risk of corruption and fraud. What impact can these issues have on target selection and deal pricing, structure, terms, and conditions? We'll discuss:

- Assessing the potential effects of corruption, economic and trade sanctions, money laundering, integrity, and fraud risk on your transaction.
- Key questions to ask upfront and what can potentially go wrong.
- Leading practices in compliance and integrity due diligence throughout the M&A lifecycle.

Learn how prepared acquirers are making compliance and integrity due diligence a central part of their decision-making process for M&A transactions.

Think ahead



In-House or Out of House: Navigating the Changing Landscape in the Legal Industry

Learn more about the current legal environment and how relationships between law firms, vendors, and corporate legal departments are evolving.

To access this podcast, visit:
www.deloitte.com/us/changinglandscape

Following the Fraud: Litigation Risks from Mismanagement during a Downturn

> September 9, 2:00 PM EDT

Presenter: Kerry Francis

As businesses emerge from a significant economic downturn, fraudulent activity may continue to make headlines for years. What types of litigation may arise from this fraudulent activity? We'll discuss:

- Fraud risk issues facing companies before versus during the downturn, as well as areas of concern as the economy rebounds.
- Potential litigation targets, including companies, directors, and officers, and the types of lawsuits they may encounter.
- Ways companies can better prepare for possible litigation resulting from these activities.

Learn about emerging trends in business litigation and actions companies can take to prepare for, and tackle, potential legal actions.

Financial Executives

Risk Intelligence

Host: Henry Ristuccia

Managing Data Security and Privacy: What Role Should Non-Tech Executives Play?

> July 30, 2:00 PM EDT

Presenters: Ted DeZabala and Rena Mears

Some executives believe data security and privacy are the sole responsibility of the IT function. But what role might the non-IT professionals play in understanding and managing data risks? We'll discuss:

- How data can become a source of business and regulatory risk.
- What non-technical managers, such as financial executives, may need to know to potentially avoid a data disaster.
- How companies might gain better insights from their data to create added value.

Gain insights into how financial executives might work more collaboratively with IT in assessing business and regulatory risk to maximize data value.

Integrating Tax in a Risk Intelligent Enterprise: What Executives Outside of Tax Need to Know

> August 27, 2:00 PM EDT

Presenters: Rita Benassi, Greg Petolick, and Kay Pitman

The pursuit of effective risk management has ushered in broader roles and increased expectations for the tax function. How do forward-thinking CFOs and audit committees point tax executives toward greater value and more effective risk oversight? We'll discuss:

- The growing involvement of the tax function in managing risks within complex global organizations.
- How better integration of tax consequences can lead to more robust business decision-making.
- Laying the groundwork for managing relevant tax issues with overall risk management implications.

Learn how the strategic integration of tax across the enterprise can help financial executives capture the upside of business risks.

Beyond Controls: Reducing Financial Reporting Risk through Process, People, and System Improvements

> September 24, 2:00 PM EDT

Presenters: Steve Curry, Jack Deem, and Bill Ribaldo

Despite significant investments in controls, financial statement reporting risks may still exist for many businesses. Are more controls the answer or should your focus shift? We'll discuss:

- How financial reporting risk may stem from manual, non-standard, decentralized, or non-documented processes.
- Potentially mitigating financial reporting risks by having the right number of people in the right roles with the right skills.
- Assessing financial systems to determine if they provide functionality to reduce financial reporting errors.

Learn how improvements to finance processes, people, and systems may reduce financial reporting risk and help improve the accuracy, timeliness, and transparency of your financial statements.



Financial Executives

Driving Enterprise Value

Host: Rich Rorem

IFRS: Working Toward a More Cost Effective Transition

> July 7, 3:00 PM EDT

Presenters: Nick Difazio, Glen Feinberg, and D.J. Gannon

International Financial Reporting Standards continue to be adopted by jurisdictions worldwide. What can U.S. companies do now to prepare for a more efficient IFRS conversion even as they watch the SEC's deliberation on the future of IFRS? We'll discuss:

- Areas to consider as the SEC reviews comment letters responding to the proposed IFRS roadmap.
- Assessing the potential organizational impact of IFRS to determine complexity and set priorities including the preparation of an impact analysis and roadmap.
- Possible cost effective planning considerations for longer lead-time items, such as systems implementations or upgrades.

Explore ways to develop an IFRS transition plan that addresses company needs while working to reduce implementation costs.

Focus on Cash: Cracking the Code to Generate, Liberate, and Deploy Cash

> July 22, 3:00 - 4:30 PM EDT

Presenters: Melissa Cameron, Dan Kinzler, Dan Munger, and Sheila Smith

Companies have declared that cash is king, yet most have not made the shift from managing by earnings to managing by cash. What can be learned from those that have cracked the code and are embedding a cash focus throughout the organization? We'll discuss methods for:

- Generating cash – ranging from transforming to a more variable-based cost structure to creative financing and funding.
- Liberating cash – such as effectively repatriating overseas cash.
- Deploying cash – such as providing an effective overview of the company's cash position.

Learn practical ways to help your organization refocus on cash and enter the next economic upturn stronger.

New perspective



Practical insights for executives for taking a strategic approach to IFRS.

To access this report, visit:

www.deloitte.com/us/ifrs/buckleup

Industries

Banking & Securities

Enhancing Retail Banking Performance – New Insights, New Approaches

> July 28, 2:00 PM EDT

Host: Rhoda Woo

Presenters: Rob Friedman and Terry Kuester

The current interest rate environment has created earnings challenges for institutions that rely on deposits. Why does consumer and small-business banking remain an attractive segment, one with more potential than management often realizes? We'll discuss:

- Six areas in which banks can leverage existing information to understand current and prospective profitability dynamics.
- New approaches to pricing products, managing customers, establishing policies, and implementing processes.
- Ways to create short-term profit improvement opportunities that support the business case for funding further program enhancements.

Leverage new insights into the current and potential performance of an institution's products, customers, and distribution channels to help grow market share and profitability.

Banking Customer Attrition: Dealing with the Effects of a Merger or Acquisition

> September 8, 2:00 PM EDT

Host: Don Ogilvie

Presenters: Thomas Kilgore and Mike Stachowiak

In a consolidating banking environment, financial institutions need to consider what happens to customers who are absorbed in a merger or acquisition. What are their expectations and experiences, and what can be done during the transition to help prevent attrition and restore confidence? We'll discuss:

- How a merger or acquisition affects the customers of the participating banks.
- Key attrition drivers and actions to counteract them, including increased communication around the transition and minimizing account service changes.
- Fundamental enterprise-wide changes institutions can utilize to reduce attrition, including early identification of high-value clients, and relationship-based services and pricing.

Learn how to accommodate and retain customers during a bank merger or acquisition at a time when customer perceptions and behaviors are changing.

Insurance

Cost Management for Insurers: Can You Effectively Cut Your Way to Prosperity?

> August 11, 2:00 PM EDT

Host: Boris Lukan

Presenters: Ted Goldberg and Tina Naser

As slower growth and reduced investment income become established norms, cost management will become a vital competitive differentiator for insurers. What are the elements of a disciplined, strategically-aligned cost structure? We'll discuss:

- Considerations for designing a cost management program.
- Cost management program options and specific management tactics, including case studies.
- Why effective cost management can and should lead to spending reductions or increases, depending on the circumstances.

Explore why a disciplined cost structure is table stakes in this industry today, and learn ways to design and implement an effective program across organizational boundaries.

Preparing for the New Regulatory Reality: What Insurers Need to Know

> September 22, 2:00 PM EDT

Host: Rebecca Amoroso

Presenters: Steve Foster, Carl Groth, and Howard Mills

In light of recent industry events, a new, more complex regulatory framework is likely to mandate additional monitoring of financial performance and solvency standards over the longer term. How should insurers prepare? We'll discuss:

- New York State Insurance Department stress testing requirements and emerging trends.
- Proposals by the Obama Administration and Congress that would impact existing regulatory frameworks.
- The potential impact of systemic risk regulation on the insurance industry.

Learn about emerging strategies that could lead to better navigation of the new regulatory landscape from the perspective of corporate governance, operations, reputational risk, and regulatory reporting.

Industries

Private Equity, Hedge Funds & Mutual Funds

Risk Management: Are You Ready for Significant Change?

> July 21, 2:00 PM EDT

Host: Donna Glass

Presenters: Elizabeth Krentzman, Ricardo Martinez, and Adam Weisman

Unfavorable market conditions, regulatory scrutiny, and litigation are making risk management more challenging for private funds. What is expected of advisers to hedge funds, private equity funds, and venture capital, and what leading practices in risk management are emerging? We'll discuss:

- Emerging regulatory issues, including the direction of Congress and the SEC and how regulatory initiatives could impact your business.
- Preparing for investigations and potential litigation.
- Developing and executing an enterprise risk framework – addressing operational, compliance, counterparty, and liquidity risks.

Learn the trends, leading practices, and practical suggestions for managing risk in a highly dynamic environment.

Sustainable Cost Management: A Catalyst for Future Profitability?

> August 4, 2:00 PM EDT

Host: Adam Broun

Presenters: Mike Fay, Miguel Miranda, and Atul Subbiah

With asset levels falling, revenues down, and clients demanding reduced fees, asset managers are reassessing their go-forward strategies – workforce realignment being top of mind for many. How are firms responding to the need to balance sustained cost management and maintain an effective enterprise risk management program? We'll discuss:

- Core business focus – aiming for profitable distribution channels, products, and clients and expanding outsourcing mandates.
- Simplifying the operating model – aggressively exploring the possibility of carve-outs and spin-offs.
- Optimizing available workforce levels to maintain effective risk and control environments.

Learn how leading firms are implementing effective cost management strategies to gain a competitive edge and meet operational needs.



Industries

Consumer Business

Green Strategies: Another Look at Sustainability

> July 23, 11:00 AM EDT

Host: Rod Millot

Presenter: Scott Bearse, Peter Capozucca, and Chris Rizzio, Carter Ledyard & Milburn LLP

With higher customer expectations and greater regulatory scrutiny, sustainability has made its way to the forefront of major consumer businesses. How can the use of green strategies throughout the enterprise help consumer businesses reduce costs, generate revenue, and increase value? We'll discuss:

- A multidisciplinary approach to structuring a green program that helps improve green ROI.
- How green remodeling may reduce operating expenses and potentially generate revenue.
- Financial incentives, government regulations, and tax benefits that drive companies to be more sustainable.

Learn why consumer businesses should take another look at sustainability.

How Social Media-Based CRM Can Help Address Changing Consumer Demands

> September 17, 11:00 AM EDT

Host: Scott Rosenberger

Presenters: Fabio Cipriani and Mark Wooten, Senior VP, Oracle CRM on Demand, Oracle

Social collaboration-based sales and marketing technologies help companies understand and manage changing consumer demands. How can these technologies help employees, sales people, their partners, and customers work in a more natural, dynamic fashion – and thereby respond to market changes and enhance overall sales productivity? We'll discuss:

- The issues companies face in working collaboratively, including community creation and customer interaction.
- How collaboration improves information sharing and conversation between customers, employees, and trading partners.
- A case study of how Oracle promotes enterprise collaboration across its own sales processes.

Learn how leading companies are incorporating collaborative sales and marketing solutions into their overall CRM strategy.

Be prepared



A Deloitte and GMA joint study on how sustainability influences consumer shopping behavior.

To access this podcast, visit: www.deloitte.com/us/greeshopperinsights

Industries

Technology, Media & Telecom

Tribalization of Business: Transforming Companies with Communities and Social Media

> July 29, 1:00 PM EDT

Host: Phil Asmundson

Presenters: Ed Moran and Francois Gossieaux, Co-founder and Partner, Beeline Labs

Many technology, media, and telecommunications companies are weighing how best to exploit online communities and social media. What leading practices should you know about? We'll discuss:

- Why the buzz about communities continues – understanding the business appeal of blogs, wikis, and other social media.
- How innovative companies leverage communities and social media to aid product development, customer support, marketing, and brand building.
- Effective practices for developing successful communities and the metrics companies use to track outcomes.

Learn from leading TMT companies and gain insights on how they are leveraging community dynamics.

The Big Shift: Is a Normal Business Environment Gone Forever?

> September 23, 1:00 PM EDT

Host: Eric Openshaw

Presenters: Lang Davison and John Hagel

A world of near-constant disruption is emerging – one in which new ideas, technologies, and extreme events constantly and unexpectedly bear down on businesses. How are successful executives finding their way in this new world? We'll discuss:

- Why the examination of traditional secular trends no longer offers a complete picture of the changing world.
- Creating and measuring value in today's new knowledge economy.
- How leaders can steer a course for true north while helping minimize distraction from short-term events.

Learn from Deloitte's Center for the Edge how innovative strategy is critical for executives who want to understand and capitalize on the forces shaping the economy.

Real Estate

Host: Dorothy Alpert

Building Back Your Bottom Line through Enterprise Cost Management

> July 9, 11:00 AM EDT

Presenters: Paul Legere and Ken Meyer

Enterprise cost management can improve your business performance through immediate and sustainable cost structure reductions. As real estate companies weather the current economic storm, how can enterprise cost management help identify those costs that are driving down your bottom line? We'll discuss:

- How enterprise cost management works.
- How to reduce costs immediately by managing spend and achieving cost savings.
- Why enterprise cost management is effective for real estate companies in today's environment.

Gain insights on how an enterprise-wide approach can help your company minimize costs in this turbulent environment and improve profits.

Gain insight



Growth and Leverage: How Technology Companies Can Innovate and Thrive in Trying Times

Learn how technology sector executives can counter today's economic challenges and enhance their competitive position.

To access this podcast, visit:
www.deloitte.com/us/podcasts/techgrowth

Industries

Manufacturing

Host: Tim Hanley

The American Recovery and Reinvestment Act: Fueling New Growth Strategies for Manufacturers

> July 8, 1:00 PM EDT

Presenters: Bob Campbell and David Pleasance

The American Recovery and Reinvestment Act (ARRA) could help manufacturers build the foundation for economic growth through infrastructure, alternative energy, energy efficiency, green jobs, and other opportunities. In what ways might manufacturing executives strategically plan to capitalize on the ARRA? We'll discuss:

- Identifying business opportunities related to ARRA funds.
- Recognizing the right resources required to accommodate the shift.
- Rethinking the right business model and strategy for the public sector.

Explore how new markets and products may fuel growth and learn about strategies for potentially leveraging the ARRA to create new opportunities.

Watch Your Step: Optimizing Your Enterprise Footprint

> September 8, 1:00 PM EDT

Presenters: Darin Buelow and Dan Munger

In the current economy, manufacturing companies are reconsidering how and where their assets are deployed. How can enterprise footprint optimization help your organization reduce costs, improve operating efficiency and flexibility, and become more responsive to immediate opportunities, crises, and unpredictable market conditions? We'll discuss:

- How footprint optimization can help improve supply chain strategy, reduce risk, increase market share, and build a sustainable competitive advantage.
- Leveraging optimization to overcome resistance to change, sustain improvements, and accelerate benefits.
- Strategies for preserving more savings while potentially capturing significant tax benefits.

Understand the benefits of optimizing your enterprise footprint and how to take the first steps in that direction.

Federal & State Government

IT Optimization: Meeting Future Demands Through New Networking Strategies

> July 28, 2:00 PM EDT

Host: Greg Pellegrino

Presenters: Kristen Miller and Mark White

IT organizational redesign is an art form. Workforce changes, technology advancements, and the economic downturn are forcing public sector CIOs to assess the efficiency of their IT infrastructure. How can organizations harness the power of networks to achieve IT optimization? We'll discuss:

- The benefits of IT transformation, including efficiency of services and civic engagement.
- Cost reduction strategies, including leveraging data center consolidation and cloud computing.
- Lessons learned from large government IT redesign projects.

Learn ways to achieve IT optimization to impact your organization's long-term performance.

The Cybersecurity Imperative: Protecting the Global Economy, Governments, and Citizens

> September 29, 2:00 PM EDT

Host: Steve Dahl

Presenters: Amry Junaideen, Gary McAlum, and Greg Pellegrino

Cyber culture is growing faster than cybersecurity, so everything that depends on cyberspace is at risk. Governments around the world need to address cybersecurity urgently so organizations can survive, thrive, and enable economic growth. How can government and business work together to prosper in this new culture of risk? We'll discuss:

- Defining and mitigating cyber risk for your organization.
- Government regulation – what are the boundaries?
- Global perspectives on addressing cyber threats and culture.

Learn ways to navigate the complexity of cybersecurity by adapting risk management strategies and tools to protect cyber assets.

Industries

Energy & Resources

Business Implications of Developing Carbon Markets: Is Your Company Ready?

> *July 22, 2:00 PM EDT*

Host: John England

Presenters: Pat Concessi, Marlene Motyka, and Brian Murrell

With Congress and the EPA moving ahead on carbon cap-and-trade initiatives and mandatory greenhouse gas emissions reporting, companies are trying to understand specific business implications. What key areas of emerging carbon regulations should you consider? We'll discuss:

- Accounting for carbon allowances and offsets.
- Tax and valuation issues presented by carbon markets.
- Carbon as a non-standard commodity and how it could affect commodities trading.

Explore how carbon regulation can impact a wide range of businesses and functions, and learn leading practices for adapting to the new regulatory environment.

New SEC Disclosure Rules: Will You Need to Refine Your Reserve Reporting?

> *August 19, 2:00 PM EDT*

Host: Gary Adams

Presenters: Phillip Hilsher and Jed Shreve

With final disclosure rules issued by the SEC, companies can expect a significant impact on oil and gas reporting requirements. How might these new rules impact your organization? We'll discuss:

- A historical look at accounting rules on reserve disclosures.
- Key rule revisions, such as changing the pricing for reserve estimates, including nontraditional resources in reserves and permission to disclose probable and possible reserves.
- New techniques for estimating reserves.
- Valuation and tax considerations.

Learn leading practices for implementing the new accounting and financial reporting standards for reserves.

Commodity Price Risk Management: Economic and Accounting Impacts

> *September 16, 2:00 PM EDT*

Host: John England

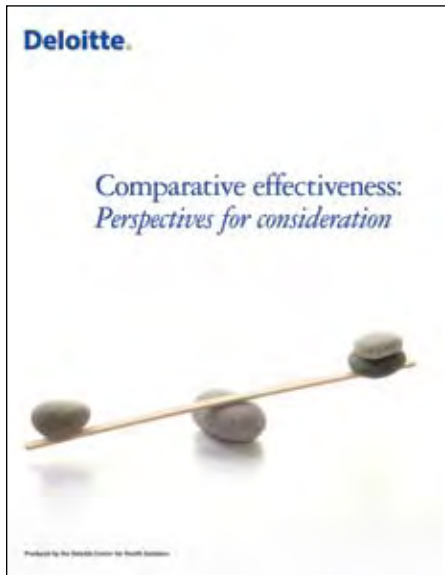
Presenters: Andrew Dunn and Michael Rohrig

Last year was one of the most volatile years in history for energy markets, underscoring the importance of commodity price risk management. What has been the resulting impact on the economic value of hedging, and what are the associated accounting ramifications? We'll discuss:

- Risk management models for energy companies versus end-users exposed to commodity prices.
- The impact on shareholder value, capital costs, and use of capital.
- Statistical relationships between markets that effectively drive a risk management program.
- The importance of accounting and business model alignment.

Understand the challenges that should be addressed when executing an effective commodity risk management program.

Stay on top



Examines lessons from abroad that demonstrate the complexity of implementing comparative effectiveness in the U.S.

To access this report, visit:
www.deloitte.com/us/comparativeeffectiveness

Health Care Plans, Providers & Life Sciences

Comparative Effectiveness: A Compelling Approach to Cost Control and Quality Improvement

> July 14, 2:00 PM EDT

Host: Steve Burrill

Presenters: Terry Hisey and Paul Keckley

Comparative effectiveness is one of the most contentious issues in health reform. Although the U.S. spends more than \$2 trillion on health care annually, less than 0.1% goes toward assessing comparative effectiveness. What will recent legislative actions mean? We'll discuss:

- Different models of comparative effectiveness used in developed health systems.
- Realities of implementing comparative effectiveness in the U.S., including the status of health reform efforts to advance comparative effectiveness.
- Implications for plans, providers, life science organizations, and government.

Learn how better evidence about the costs and benefits of different treatment options can help reduce health care spending without adversely affecting health.

Health Care Providers

Driving Competitive Advantage through Superior Patient Experience

> September 23, 2:00 PM EDT

Host: Steve Burrill

Presenter: Amy Feirn

Today's patients act increasingly like retail consumers. In this competitive environment, how can providers improve the way they attract and retain loyal consumers as an important contributor to margin management? We'll discuss:

- Emerging health care consumer expectations and ways of creating a clear vision for a differentiated patient experience.
- Conducting comparative performance analysis of patient perception metrics.
- Developing a roadmap for executing new patient-focused strategies.

Discover new market insights and explore actual case studies to learn how making a more strategic choice to compete on superior consumer service can position your organization for sustainable competitive advantage.

HR Executives

Compensation & Benefits

Host: Ron Sonenthal

Classification of Work and Workers: Could Your Company Be in for a Costly Surprise?

> August 5, 2:00 PM EDT

Presenters: Randy Harrison, Deb Heikkinen, and Kevin Shimkus

To cut costs, companies often reduce overtime, lay off employees, and rehire them under contract. However, incorrect classification of work and workers can lead to employment tax and overtime surprises. We'll discuss:

- An overview of worker and work classification issues, including how the government makes classification determinations.
- Insights into the recent landmark assessments and overtime judgments – what went wrong?
- Steps employers can take to protect themselves in the case of an audit.

Discover why some employers have ignored warnings about these hot issues, and learn how your company can take measures to stay compliant with employment tax and overtime rules.

Equity Award Programs: The Latest Cost-Cutting Innovations

> September 2, 2:00 PM EDT

Presenters: Martin Somelofske, Sean Trotman, and Marlene Zobayan

In the current economy, companies are looking for ways to make equity plans more cost effective while still attracting and motivating employees. What is working? We'll discuss:

- Achieving an effective equity award mix and using award size guidelines to reduce dilution.
- Share plan charge-backs – pushing costs out to subsidiaries internationally to secure foreign tax deductions and increase cash repatriation.
- Capturing tax benefits from your plan in selected countries, including the UK and France.

Hear the results of a recent survey from Deloitte and the National Association of Stock Plan Professionals and learn about planning opportunities to reduce equity award program costs.

Be informed



Learn about the major workforce areas that are critical to a successful IFRS conversion.

To access this report, visit:
www.deloitte.com/us/IFRSpeoplechallenges

HR Executives

Host: Burt Rea

Reducing People Costs to Gain and Retain Competitive Advantage for the Upturn

> *July 21, 2:00 PM EDT*

Presenters: Omar Aguilar and Tom Morrison

Enterprise cost reduction is an ongoing discipline that when done right can deliver results to the bottom line. Yet managing the people-related issues of reducing costs is critical for a successful long-term strategy. We'll discuss:

- The overall strategies and goals of an enterprise cost reduction.
- Scalable and sustainable approaches to workforce-related cost reduction opportunities.
- Lessons learned from the workforce changes of the latest recession.
- Communications, culture, leadership, and talent management strategies to help address the challenges of reducing people costs.

Learn ways to tackle the people-related challenges of cost reduction in support of efforts to remain competitive and adapt to a changing economy.

The People Challenges of IFRS Conversion

> *September 10, 2:00 PM EDT*

Presenters: David Buck and Michael Fuchs

Conversion to International Financial Reporting Standards is a multiyear process that impacts accounting, financial reporting, systems, and processes. What HR and organizational design issues should you consider for effective IFRS adoption? We'll discuss:

- The roles of finance, accounting, and corporate officers in IFRS analysis and assessment, conversion roadmap, and overall IFRS strategy.
- Design of HR and rewards structures to support IFRS conversion, including key employees' roles and responsibilities.
- Important questions to ask about the capabilities and resources of your IFRS team or conversion advisor.

Learn ways to position your organization for IFRS assessment and conversion through effective program management and governance.



Markets

China Issues

China Tax and Regulatory Update

> July 16, 11:00 AM EDT

Host: Lili Zheng

Presenter: Andrew Zhu and Aaron Grundman

Navigating China's evolving tax and regulatory system can be a serious challenge to even the most experienced foreign investors. What are recent changes and how could they affect U.S. companies doing business in China? We'll discuss:

- The new M&A rules in China.
- New incentives for Beijing headquarter companies, as well as tax incentives for services outsourcing businesses in 20 model cities.
- Recent VAT refund rules impacting export of CPUs and other electronics.
- New developments regarding anti-avoidance rules.

Learn how your peers are striving to anticipate, manage, and resolve issues arising from the rapidly changing environment in China.

U.S. and Chinese Stimulus Plans: Exploring Emerging Synergies

> August 13, 11:00 AM EDT

Host: Clarence Kwan

Presenter: Greg Pellegrino

As the U.S. and China continue to serve as the twin engines of global economic recovery, what emerging investment opportunities might be common to both markets? We'll discuss:

- Industries likely to benefit from the U.S. and Chinese stimulus packages, including high tech and alternative energy.
- Market players in both countries and the potential for synergy creation.
- Innovative strategies for exploiting these synergies, such as finding the right strategic partner.

Stay abreast of the current economic environment in these two powerhouse countries and identify new growth opportunities in each.

China Cross-Border Investment – U.S. Carve-Outs for Chinese Investors

> September 10, 11:00 AM EDT

Host: Wendy Cai

Presenter: Andy Wilson

With the emergence of increasingly global companies from China, Chinese investors are becoming more interested in U.S. corporate carve-out opportunities. What do U.S. companies need to know? We'll discuss:

- Recent trends in carve-outs and what U.S. companies can learn from them.
- U.S. industries and types of carve-outs preferable to Chinese investors.
- Strategies for attracting Chinese investors, such as creating the right value proposition for strategic buyers.

Hear the results of Deloitte's latest survey on carve-outs, and stay on the cutting edge by taking a deeper dive into the latest investment trends among Chinese multinationals.

Markets

Private Companies

FIN 48: It's Here to Stay – Are You Ready?

> August 25, 2:00 PM EDT

Host: Mike Becher

Presenters: Chris Houser and Rich Paul

Implementation of FIN 48 is looming on the horizon. Calendar year private companies must address it in their 2009 annual financial reporting. Are you waiting too long to get started? We'll discuss:

- FIN 48 requirements, planning timeline, and major tasks.
- Practical tips for implementation, including resources needs, an implementation framework, and key processes.
- Lessons learned from public companies, including leveraging FIN 48's benefits, states in which you might have unexpected tax liabilities, and the risks of implementing FIN 48 in a bubble.

Understand the intricacies of implementing FIN 48, and gain insights on how to make it work to your company's advantage and implement with a minimum of disruption.

Private Aircraft: Fasten Your Seatbelts and Raise Your Tray Tables

> September 29, 2:00 PM EDT

Host: Katy Hollister

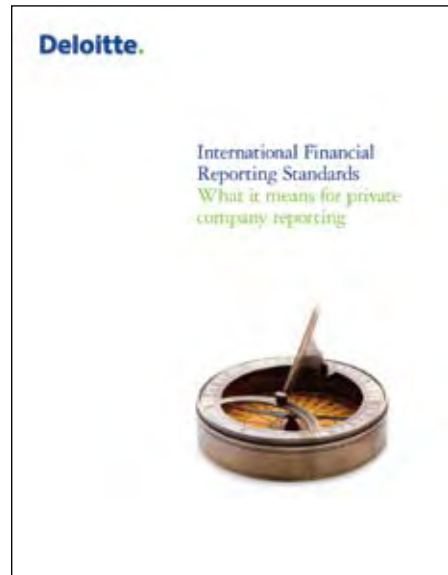
Presenters: Bina Patel and Steven Thorne

Private business aviation is experiencing unprecedented turbulence, from declining aircraft values to confusing and complex new tax rules. What should private aircraft owners know to keep aloft while navigating these changes and remaining both FAA and IRS compliant? We'll discuss:

- Depreciating the business aircraft – planning, problems, tips, and opportunities.
- Understanding the personal use disallowance provisions and minimizing their impact.
- FAA and Federal Excise Tax rules.
- IRS examinations – issues on which the government is focusing.

Learn to identify and address the rapidly evolving tax and non-tax issues associated with corporate aircraft ownership.

Ideas that matter



Explore the movement toward IFRS and implications for private company financial reporting in the United States.

To access this report, visit:

www.deloitte.com/us/IFRSforprivatecompanies

Tax Executives

Tax Operations

Host: Nick Gonnella

Indirect Taxes: Finding Cash, Mitigating Risk, and Creating Efficiency in a Changing World

> July 23, 2:00 PM EDT

Presenters: Nigel Mellor, Messiha Shafik, and Scott Shafer

Managing indirect taxes and the related administrative expenses is a monumental challenge for many companies. How can finance and tax executives proactively address this issue in light of recent law changes while evaluating their global indirect tax position? We'll discuss:

- Why indirect taxes matter – challenges and opportunities, retroactive and prospective.
- Recent law changes that are reshaping the indirect tax landscape, including the EU's new Value-Added Tax rules and Ontario's harmonization of goods and services tax.
- Leading practices in data management and technology enablers.
- Controlling burdensome compliance obligations.

Learn how leading companies are improving management of indirect taxes at a crucial time.

Making Tax a Strategic Partner: Creating a Risk Intelligent Tax Function

> August 20, 2:00 PM EDT

Presenters: Rita Benassi, Greg Petolick, and Kay Pitman

Increasingly, tax executives need to clearly communicate the relationship between specific tax risks, overall tax risk management, and the tax implications of other business risks. How can tax be better positioned as a strategic, value-adding player in business decisions? We'll discuss:

- Tax's growing involvement in enterprise-wide risk management.
- How better integration of tax consequences can lead to more robust business decision-making.
- Laying the groundwork for managing tax risk and reward within your company's risk management framework.

Learn how the strategic integration of tax across the enterprise can help capture the upside of business risks.

Provision Process and Technology: Raising the Bar on Speed, Accuracy, and Usability

> September 17, 2:00 PM EDT

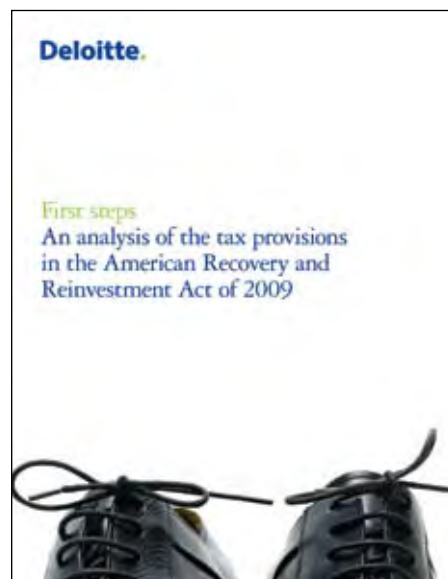
Presenters: Steve Ceglarek, Jennifer Deutsch, and Emily VanVleet

Tax departments are continually asked to report earlier, identify rate drivers sooner, and respond nimbly to planning opportunities. What key inputs to the income tax provision can help accomplish these objectives? We'll discuss:

- The importance of a life-cycle approach to defining the provision process.
- Identifying data drivers and weighing approaches to help capture important data at the right times.
- Getting the numbers right to facilitate sustainable accuracy and support scenario analysis.
- Assessing and selecting a technology tool.

Learn about leading practices and technologies for the provision process that can help your department add greater value to the business.

Look ahead



Learn more about tax developments from Washington.

To access a report on the stimulus package, visit:
www.deloitte.com/us/taxstimuluspackage

To examine our ongoing analysis of the proposed budget, visit:
www.deloitte.com/us/tax/budgetproposalresourcecenter

Tax Executives

International Tax

Special FX – Understanding U.S. Tax Treatment of Cross-Border Foreign Currency Hedging Transactions

> July 30, 2:00 PM EDT

Host: Tim Tuerff

Presenters: Garner Prillaman and Jackie Tran

With recent dramatic swings in foreign exchange (FX) rates, cross-border hedging has grown in size and scope. As both multinational companies and taxing authorities focus more on these transactions, what should you know? We'll discuss:

- An overview of the U.S. tax rules related to cross-border FX hedging.
- The subpart F implications of cross-border FX hedging transactions.
- The significant differences between the tax and U.S. GAAP treatment of FX hedging transactions and the identification and other threshold requirements.

Understand how the adjustments required to your hedging programs ensure that GAAP-compliant hedging transactions also qualify for favorable U.S. tax treatment.

Foreign Tax Update: Spotlight on China, Singapore, and Other Recent Developments

> September 24, 2:00 PM EDT

Host: Pierre-Henri Revault

Presenters: Peter Chen and Li Mei Liew (Singapore)

Multinational companies may be impacted by recent changes to tax legislation in several countries. What do you need to know? We'll discuss:

- China – new M&A rules, financial incentives, and practical cross-border structuring and transactional issues.
- Singapore – update on tax incentives available for manufacturing, finance, intellectual property management, and other activities.
- Key developments in other foreign jurisdictions.

Learn the latest major foreign tax developments so you can investigate further and explore considerations for tax planning.

Transfer Pricing

Host: Mark Nehoray

Surviving the Downturn – Addressing Multistate Transfer Pricing Is Critical

> August 12, 2:00 PM EDT

Presenters: Jim Ryan and Marc Speer

Transfer pricing strategies established during growth years may not be tax efficient during an economic downturn. Could a fresh look at your multistate transfer pricing strategy mitigate potential issues and reveal new opportunities? We'll discuss:

- Recent developments at the state level, including new filing requirements and the trend toward third-party reviews.
- Assessing your current strategy and analyzing comparables and extraordinary adjustments to reflect a more appropriate allocation of profits.
- Non-traditional approaches to planning, including preaudit negotiations with states.

Explore the value of revisiting your multistate transfer pricing strategy and learn about leading edge planning and compliance techniques.

Latin America Update: Finding Firm Ground in a Constantly Changing Environment

> September 9, 2:00 PM EDT

Presenters: Ricardo Gonzalez (Mexico City) and Marcelo Natale (Sao Paulo)

Transfer pricing continues to be a pressing issue across Latin America, especially with the global recession in full force. What do you need to know? We'll discuss:

- Legislative developments in Mexico, Brazil, Argentina, and other key countries in the region.
- New information and documentation requirements and continuing scrutiny of new business models in Mexico.
- Hot audit issues, such as recent changes in audit processes and treatment of perceived abuses by various tax authorities.

Gain insights on the continually evolving transfer pricing environment in Latin America, how they might impact your business, and steps you can take to address them.

Tax Executives

Compensation & Benefits

Host: Ron Sonenthal

Classification of Work and Workers: Could Your Company Be in for a Costly Surprise?

> August 5, 2:00 PM EDT

Presenters: Randy Harrison, Deb Heikkinen, and Kevin Shimkus

To cut costs, companies often reduce overtime, lay off employees, and rehire them under contract. However, incorrect classification of work and workers can lead to employment tax and overtime surprises. We'll discuss:

- An overview of worker and work classification issues, including how the government makes classification determinations.
- Insights into recent landmark assessments and overtime judgments – what went wrong?
- Steps employers can take to protect themselves in the case of an audit.

Discover why some employers have ignored warnings about these hot issues, and learn how your company can take measures to stay compliant with employment tax and overtime rules.

Equity Award Programs: The Latest Cost-Cutting Innovations

> September 2, 2:00 PM EDT

Presenters: Martin Somelofske, Sean Trotman, and Marlene Zobayan

In the current economy, companies are looking for ways to make equity plans more cost effective while still attracting and motivating employees. What is working? We'll discuss:

- Achieving an effective equity award mix and using award size guidelines to reduce dilution.
- Share plan charge-backs – pushing costs out to subsidiaries internationally to secure foreign tax deductions and increase cash repatriation.
- Capturing tax benefits from your plan in selected countries, including the UK and France.

Hear the results of a recent survey from Deloitte and the National Association of Stock Plan Professionals and learn about planning opportunities to reduce equity award program costs.

Multistate Tax

Host: Karen Boucher

Net Operating Losses: Why 2008 Returns May Require a Different Approach

> July 14, 2:00 PM EDT

Presenters: Russ Banigan and George Barry

As calendar-year companies prepare 2008 tax returns, net operating losses may play a more prominent role than usual. What issues might NOLs present at the state level versus federal? We'll discuss:

- Preparing your loss-year return, including differences between federal and state filing methods and NOL limitations in revenue-challenged states.
- Using NOL deductions on a carry-forward basis, including the possible discrimination against foreign-source dividends.
- How reorganization plans and divestitures can make you lose or mischaracterize NOLS.

Discover why businesses potentially may not use both federal and state NOLs, and learn about analyzing NOL rules in significant states where your business operates.

Revenue Agent Report Compliance: Follow the Law without Losing Your Mind or Your Shirt

> August 11, 2:00 PM EDT

Presenters: Laura Holmes, Steve Spaletto, and Renae Welder

The work has only begun when an IRS audit closes, since amended state and local returns then need to be filed. How can you stay sane as you address the details? We'll discuss:

- Timing of filing deadlines and implications of partial agreements, joint committee approvals, and settlements.
- Leading practices for meeting states' requirements, including filing format and impact on state attributes, such as modifications and apportionment.
- Post-return submission issues, including accurate interest calculations for numerous years and offsets, credit and NOL adjustments, and incorporating non-RAR adjustments.

Explore RAR compliance issues and learn efficient techniques for meeting state and local reporting requirements.

Sales, Use, and Excise Tax Audits: How Well Are You Managing Risk?

> September 1, 2:00 PM EDT

Presenters: Robyn Staros and Marcy Stulce

Companies are finding that too many of their state sales, use, and excise tax audits are tied up in controversy. With interest ticking away on exposures at exorbitant rates, how can tax departments streamline the audit process? We'll discuss:

- The current environment – approaches states are willing to entertain, including settlements, prior audit errors rates, extrapolations, and managed audits.
- Evaluating the merits of these approaches based on your prior audit history, business consistency over time, and volume of sales and other transactions.
- Cutting-edge techniques for streamlining audits, including methodologies for more efficient data extraction, sampling, and modeling.

Gain insights on the evolving state sales, use, and excise audit environment, and learn ways to resolve audits faster, use resources more effectively, and reduce interest and penalties.

Tax Executives

Tax Controversy

Host: Kathy Petronchak

IRS Issue Tiering Strategy: Revisiting IRS Alternative Dispute Resolution Techniques

> July 15, 2:00 PM EDT

Presenters: Tom Cryan and John Keenan

The IRS Issue Tiering strategy has affected various alternative dispute resolution techniques, such as the Fast Track Settlement program. What can taxpayers do now? We'll discuss:

- IRS Issue Tiering strategy, including the process of resolving tiered issues.
- Delegation of settlement authority in Examination and Appeals.
- Impact of settlement guidelines in resolving issues in Examination and Appeals.

Understand the IRS' evolving internal rules and procedures in settling disputes, particularly in light of the Issue Tiering strategy.

International Considerations in Handling IRS Examinations – Including Transfer Pricing

> August 18, 2:00 PM EDT

Presenters: Tom Cryan, John Keenan, and Kim Peterson

The IRS recently announced its intention to increase enforcement activity for international tax issues. What should U.S. multinational companies expect? We'll discuss:

- Insights into the current environment at the IRS, which is focused heavily on international compliance, especially with regard to transfer pricing.
- Practical considerations in handling international examinations.
- Documentation requirements needed in defending IRS audits.

Explore the current international initiatives at the IRS and become better prepared for any potential audits.

FAS 109

Host: Rita Benassi

Material Weaknesses and Restatements: Is Tax Still in the Hot Seat?

> August 3, 2:00 PM EDT

Presenters: Kathy McEligot and Randall Sogoloff

Tax issues continue to lead to material weaknesses and financial reporting restatements. How can you play a more effective role in addressing these risks? We'll discuss:

- Tax-related material weaknesses that still plague companies.
- Comparing the leading causes of tax-related material weaknesses today with those of prior years and what can be done to address them.
- Tax technical issues that potentially may lead to financial reporting restatements.
- The interaction between material weaknesses and restatements.

Gain new insights on tax issues that potentially may result in tax-related financial reporting concerns for companies and learn how to manage the risk.



Tax Executives

Federal Tax

Host: Scott Dinwiddie

Workforce Reductions: Taking Care of Employees While Positioning Your Company for the Future

> July 16, 2:00 PM EDT

Presenters: Jason Flynn, Mark Lachowicz, and Deann Newman

When rightsizing the workforce becomes an unavoidable reality, how can Tax, HR, and management work together to manage current costs while preparing to ramp-up when business conditions improve? We'll discuss:

- Planning and design – analyzing old and new strategies to reduce employee costs with an eye toward future growth, and structuring benefits to retain valued employees.
- Implementation – creating a communications strategy for remaining and departing employees and helping departing employees make informed decisions about their offers.
- Ongoing issues – structuring the new workforce to maintain high productivity and align it with the business objectives.

Learn how your company's resource planning today can help create a stronger company tomorrow.

Distressed Companies: How Tax Executives Can Help Smooth the Ride

> August 19, 2:00 PM EDT

Presenters: Bryan Collins and David Hoffman

Many companies continue to pursue restructuring in an uncertain economy. How can tax executives play a strategic role? We'll discuss:

- Why tax issues are critical – preserving tax attributes, managing cash taxes, and benefits of tax-efficient restructuring for the long-term.
- Phases of distress and their tax implications – underperforming, troubled, distressed, bankrupt, and post-reorganization.
- Tax milestones and deliverables along the bankruptcy timeline.
- Opportunities for future tax efficiency – avoiding unwanted ownership changes, tax-efficient changes to debt instruments, and addressing NOL limitations.

Explore what tax executives will need to deliver during a business restructuring and ways of establishing a framework that supports future tax efficiency.

Mergers and Acquisitions: Are You Using Corporate Tax Attributes to Their Full Potential?

> September 30, 2:00 PM EDT

Presenters: Elizabeth Drigotas, Jeff Shaw, and Kyle Woitel

In M&A transactions, certain corporate tax attributes could be at risk depending on the deal structure. How can tax executives help improve cash flow through more efficient use of these attributes? We'll discuss:

- Alternative transaction structures and their fact patterns that allow use of certain attributes to obtain a tax-basis step up for the purchaser.
- Rules on timing of income items and deductions, such as change of control deductions, transaction financing, and compensation-related items.
- Evaluating consequences of the transaction structure and assessing the most tax-efficient approach.

Explore various ways to structure M&A transactions so available corporate tax attributes can be used to enhance post-transaction after tax cash flow.

Stay ahead



Learn how trends in globalization, effective use of resources, and performance measurement may impact tax departments.

To access this report, visit:

www.deloitte.com/us/taxoperationalstrategyandexecution

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