



**Insurance Tax Convention 2023
Tuesday 5th September**

**Hilton Brighton Metropole - King's Road,
Brighton, BN1 2FU**

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| 08:15 | Networking registration/tea and coffee |
| 09:00 | Welcome: |
| | Conference Chair: Jon Priestnall, Group Tax Director, Aviva |
| 09:10 | Keynote Address: |
| | Economic / Political outlook - Kitty Ussher, Chief Economist, Institute of Directors |
| 09:35 | Breakout Sessions 1: |
| | <p>Breakout A: Topical Tax Issues for Life Assurers (KPMG)</p> <ul style="list-style-type: none"> • Gordon Gray, Insurance Tax Director, KPMG • Robert Dunlop, Tax Policy and Technical Lead, Aviva <p>Breakout B: Back to Basics: Permanent Establishments (PwC)</p> <ul style="list-style-type: none"> • Agustina Barber, Director, PwC • Helen Mellor, Senior Manager, PwC <p>Breakout C: The Future of Work / Hybrid Working / Employment Taxation (EY)</p> <ul style="list-style-type: none"> • Nicholas Yassukovich, Partner, EY • Laurie Griffith-Jones, Head of Global Employment Tax, LGIM America |
| | Networking Break |
| 10:40 | Plenary Session: OECD Pillar Two Implementation |
| | <ul style="list-style-type: none"> • Alison Lobb, Partner, Deloitte • Hannah Simkin, International Tax Director, Deloitte |
| 11:10 | Plenary Session: International / Public CbCR Update |
| | <ul style="list-style-type: none"> • Damon Lambert, Tax Partner, KPMG • Darryl Hards, Bupa • TBC |
| 11:40 | Breakout sessions 2: |
| | <p>Breakout D: OECD Pillar Two Implementation (PwC)</p> <ul style="list-style-type: none"> • Robert Gooding, Partner, PwC • Andrew Millier, Head Tax EMEA & Direct Tax Operations, Swiss Re <p>Breakout E: ESG / Transparency (EY)</p> <ul style="list-style-type: none"> • Aran Mustafa, Partner, EY • Elizabeth Armstrong, Tax Partner, EY • Michael Ludlow, Head Group Tax, Swiss Re <p>Breakout F: HMT / HMRC policy update (Deloitte)</p> <ul style="list-style-type: none"> • Dan Gallon, Tax Director, Deloitte • Murray McLaren, Financial Services Tax Partner, Deloitte • Jamie Vernon, Transfer Pricing Policy Lead, HMRC |
| 12:25 | Networking Lunch |
| 13:35 | Plenary – Indirect Tax |
| | <ul style="list-style-type: none"> • Simon Harris, Partner, EY |

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| | <ul style="list-style-type: none"> Industry person (tbc) |
| 14:05 | Breakout Sessions 3: |
| | <p>Breakout G: Unravelling The New R&D Regime Changes: A Financial Services Perspective</p> <ul style="list-style-type: none"> Mohammed Mogra, Director, Innovation Tax, Grant Thornton Forrest Brown - TBC <p>Breakout H: Transfer Pricing: the New Rules (KPMG)</p> <ul style="list-style-type: none"> Essi Siamevi, Director, Financial Services Transfer Pricing, KPMG Robin Archer, Director, Financial Services Transfer Pricing, KPMG Sophie Lefevre, EMEA Head of Transfer Pricing, Chubb <p>Breakout I: Indirect Tax Update (Deloitte)</p> <ul style="list-style-type: none"> Thomas Jacobs, Partner, Deloitte Pete Juggins, Director, Deloitte Hussna Thupsee, Senior Tax Manager, Swiss Re Ashleigh Holman, VAT Manager, M&G |
| 14:50 | Networking Break: |
| 15:10 | Plenary Session: The Future of Tax (including AI/robotics/Chat GPT/MTD etc) |
| | <ul style="list-style-type: none"> Jonathan Howe, EMEA Connected Compliance Leader, PwC |
| 15:40 | Discussion on current issues |
| | <p>The Big Four Panel (ALL)</p> <p>Chair: David Jordorson, Manager, Tax, ABI</p> <ul style="list-style-type: none"> Jenny Coletta, Tax Partner, EY Sue Holmes, Head of FS Tax, Deloitte Ric Loudon, Partner, KPMG Andy Rosam, Partner – Insurance Tax, PwC UK |
| 16:10 | Concluding remarks and close of convention |
| | Conference Chair: Jon Priestnall, Group Tax Director, Aviva |
| 16:15 | Convention Finishes |