

## 2019 SOI Consultants Panel Meeting

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**9:00 AM - 9:15 AM Welcome**  
Barry Johnson, Acting Chief Research and Analytics Officer, Internal Revenue Service

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**9:15 AM - 10:15 AM A First Look at Data Reflecting the Tax Cuts and Jobs Act (TCJA)  
Business Tax Provisions: Inclusion of Deferred Foreign Income upon Transition to Participation Exemption System (Section 965)**

*Background on IRC Section 965 - Melissa Costa*  
*Controlled Foreign Corporations (CFCs) Data from TY2016 relating to Section 965 - Melissa Costa*  
*SOI 2017 Form 1120 Section 965 Data, Including Reporting Issues and Limitations - Caitlin McGovern*  
*Upcoming Corporate/International TCJA Studies: BEAT, GILTI, and FDII - Melanie Patrick*

Discussant: Lin Smith, PricewaterhouseCoopers, LLC

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**10:15 AM - 11:00 AM Estimating the Impact of Amended Filings and Audits on SOI Statistics**  
Jennifer Ferris and Tuba Ozer-Gurbuz  
Open discussion with panel members and audience

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**11:00 AM - 11:15 AM Break**

**11:15 AM - 12:15 PM Updates on Alternative Data Sources**

**A Synthetic Supplemental Public Use File of Low-Income Information Return Data**  
Len Burman

**Synthesizing the Individual Public-Use File for Broad Dissemination**  
Dan Feenberg

**Using Machine Learning Approaches to Improve Industry Coding in IRS Master File Data**  
Anne Parker

Discussant: Julia Lane, New York University

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**12:15 PM - 1:30 PM Lunch**

**1:30 PM - 2:15 PM Meeting Client Expectations for Timely and Accurate Tax Data**  
Jack Pearson, Canada Revenue Agency  
Open discussion with panel members and audience

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**2:15 PM - 3:15 PM The Other America: Inequality, Taxes, and the Very Rich**  
Jenny Bourne

**Some Empirical Patterns in the US Municipal Bond Market and the Case for Qualified Municipal Infrastructure Bonds**  
Robert Strauss

Discussant: George Plesko, University of Connecticut

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**3:15 PM - 3:45 PM New Releases of Individual Filing Season and Small Business Income Statistics**  
David Paris  
Discussant: Michael Udell, District Economics Group

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**3:45 PM - 4:00 PM Closing and Final Thoughts**  
Barry Johnson