

GT Events and Programs Guide

OCTOBER/NOVEMBER 2019



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About GT Events and Programs Guide

Today's global business environment is marked by a variety of regulatory risks, profound technology changes and a complex and competitive marketplace. We seek to bring high-quality service to our clients and relevant insights on the issues affecting their businesses.

Grant Thornton events and programs guide is a look ahead at the latest knowledge and insights available from Grant Thornton LLP for our clients. It includes a collection of our research, thought leadership and a schedule of upcoming webcasts and events.

The distinctive perspectives and featured events within aim to help our clients navigate today's business opportunities, risks and challenges.

To receive ongoing insights from our team:



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Services





Advisory services

Grant Thornton's Advisory professionals are progressive thinkers who create, protect, and transform value today, so our clients have the opportunity to thrive tomorrow. While business goals and strategies evolve, our services can support you wherever you are — whether you're looking at a transaction to propel you forward, focusing on developing and implementing the right controls to mitigate risk, or transforming your company's finance and technology infrastructure to match your aspirations.

Changing the value game

We are changing the value game for clients. Our mission is to help you create value for your organization, protect its value against unnecessary business risks and transform your business value through operations and technology investment. To have the maximum impact on your business at any stage, we deliver advisory services through interconnected business areas:

- **Business consulting** — Fine-tune your organization for optimal performance through financial management, operations transformation, strategy and transformation, digital transformation and management, and enterprise applications strategy and integration.
- **Business risk services** — Identify, manage and mitigate risk through controls, regulatory compliance, forensics, cyber and attest services.
- **Enterprise technology strategy & innovation** — Help CIOs design, build and transform their organizations to deliver the agility, results and value demanded by the digital world through enterprise technology strategy, advanced digital technology and analytics, IT service management, IT strategic sourcing and technology resource effectiveness.
- **Transaction services** — Open new horizons for competitive advantages and business profitability through diligence, corporate value consulting, strategic solutions and MSA tax consulting services.

Advisory subscriptions

CFO Survey

Subscribe to our *CFO Survey*, which is conducted biannually with CFOs and other senior financial executives across the United States. Questions range from the state of the economy to growth projections, strategies and barriers.

Corporate General Counsel Survey

Subscribe to our annual survey that tracks regulatory and compliance issues faced by in-house counsel.

CorporateGovernor Newsletter

Subscribe to our e-newsletter covering issues related to compliance, corporate governance, board member roles and responsibilities, internal controls, risk, fraud detection and prevention and more.

Forensic Alert Newsletter

Subscribe to our periodic e-newsletter to receive relevant insights on timely topics to guide the decision-making process of in-house counsel when confronted with fraud and regulatory issues.

Risk Perspectives

Subscribe to our series featuring content about critical risk and compliance issues facing our clients today. Content will be delivered via a series of surveys, reports, webcasts and thought leadership.



Thought leadership

Boost Customer Loyalty Through Personalization

Companies today have massive amounts of data — about their customers, their prospects, and the types of products and services that sell well and those that don't. Your data can help you treat customers as individuals, earning their loyalty and driving company growth.

Take off With Strategic Enterprise Asset Management (EAM)

EAM has the power to shape decisions at the top, but it needs to be informed by data from the front line regarding an organization's assets throughout their life cycle. Strategic EAM can drive planning, executing and tracking of maintenance activities across departments and locations to optimize return on investment. If done wisely, EAM can promote significant savings.

7 Tips for Steering a Path Through Disruption

Where will the next Amazons pop up in your industry? See 7 tips for navigating a business landscape constantly disrupted by emerging technologies and other forces.

Move Digital From Center Stage to Backstage

It used to be that “digital” meant cutting edge, speed and high tech. Today, however, digital applies to just about everything and is integrated so seamlessly into our lives, from the music we listen to, the shows we watch, the purchases we make and the apps and programs we can't live or work without. So the obvious question is, what's next?

To Grow Sustainably Know Your Customers

To accelerate your company growth, make understanding your customers, both existing and potential, the central purpose. This understanding is informed by customer segmentation based on behaviors and values, not just demographics, and by journey mapping that defines how to invest in meeting expressed needs.

Automation Favors Clients Over Administration

Dedicate more time to clients and less to administration; integrate Oracle systems to increase customer service and improve decision-making to drive business.

When Software as a Service (SaaS) Grows Up

The SaaS market is expanding. Statista projects that it will reach \$130 billion next year — more than double its size in 2014. Grant Thornton Advisory says there are already four market trends that point to some of tomorrow's service-based solutions.

Are You Watching The Wrong Metrics for Agile?

Agile methodologies have become the standard approach for projects that face today's evolving business needs, according to an online survey of development and IT professionals. Agile methodologies have a dynamic adaptability that is often critical for projects driving digital transformation.

Cloud-Based HR Scoops Analytics Communication

Moving HR processes to the cloud provides companies and employees with solutions as a scalable platform for analytics growth and acquisition and easy access to pay and benefits. Grant Thornton's guidance in implementing an Oracle Cloud solution cuts time and cost.

How Data Can Drive Oil, Gas and Power

In the energy industry, many organizations have been waiting to adopt or invest in new technology but time is running out. New technologies are paying off for the competition and now enabling companies to maximize recoveries, profits and leading to larger investments.

Quality Culture: Beyond Compliance to Improvement

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European Union Medical Device Regulations (EUMDR)/ In Vitro Diagnostic Regulations (IVDR): Your Readiness Checklist and Approach to Remediation

October 30, 2019

This second webinar - in a two part series - will address areas medical device companies should be focusing on now as the countdown begins to the start of the European Regulations, beginning May 2020. Presenters will discuss items to consider on your readiness checklist and how to navigate your remediation efforts.

Operationalizing Data Privacy Through Identity-Centric Discovery

Archive Webcast

Regulations like the General Data Protection Regulation (GDPR) and California Consumer Privacy Act (CCPA) are shifting traditional data privacy and security responsibilities; creating more operational requirements and processes for direct interaction with consumers. Grant Thornton and BigID will be discussing how personal data discovery can be leveraged to address the growing number of data privacy mandates such as sensitive data identification and protection; data subject rights fulfillment, and breach notification and response.

Win the Downturn: The Best Defense is a Great Offense

Archive Webcast

While no one can predict with complete accuracy when or if a downturn will hit, it's clear that our decade-long burst of economic growth may be coming to a close. Discover why this downturn will be different from the ones before.

Applying Lean Practices in the Nonprofit/Higher Education Sectors

Archive Webcast

Most commonly associated with companies in the manufacturing sector, “lean” practices have helped many organizations achieve efficiencies and drive stakeholder value. This webcast will focus on how today's nonprofit organizations and higher education institutions can benefit from understanding, exploring, and implementing lean concepts.

Technology Investment Trends in the Energy Industry

Archive Webcast

While companies in the energy industry have traditionally invested in field technology to improve operations, technology investments are shifting toward the financial back office and other non-operational areas. This webcast explored the latest investment trends in Energy technology, including several use cases.

Manufacturing & the Cloud: Strategies to Evaluate and Successfully Migrate

Archive Webcast

As cloud applications expand their supply chain capabilities, manufacturing companies—traditionally laggards in cloud adoption—are changing their view on cloud technologies. This webcast outlines the latest trends in ERP.

European Union Medical Device Regulations (EUMDR)/ In Vitro Diagnostic Regulations (IVDR): Countdown to 2020 and Beyond. Are you Ready?

Archive Webcast

This first webcast of a two-part series will address the European Union regulations that begin to come into effect in 2020 and the immediate and long term challenges ahead for medical device and in vitro diagnostic companies. Presenters will describe tactical ideas and options you can include in your plan and approach, while unpacking key strategies to protect your company and maintain compliance along the journey.



Sponsorships and events

EDUCAUSE Annual Conference

October 14-17, 2019

Chicago, IL

Grant Thornton is exhibiting at the EDUCAUSE 2019 Annual Conference that showcases the best thinking in higher education IT. This premier higher ed IT event brings together professionals and technology providers from around the world to share ideas, grow professionally, and discover solutions to today's challenges.

IIA's 2019 All Star Conference

October 21-23, 2019

MGM Grand / Las Vegas, NV

The 2019 All Star Conference delivers cutting-edge insights on issues impacting the internal audit environment now and in the future. Join Grant Thornton's session as we discuss forging a path toward value-add internal audit.



Audit services

Our seasoned audit practitioners deliver insightful opinions leading to high-quality, independent audits that help companies access capital markets to prepare for tomorrow, today. Audited financial statements are important to our clients' businesses, shareholders/owners, lenders, investors, and other stakeholders. Grant Thornton works with some of the country's most successful private and public companies to first understand their businesses and the risks they face, and then to focus our efforts where they matter most. We work with clients to improve their overall financial reporting processes and to help them better understand their business.



Thought leadership

SEC Proposes to Modernize Reg S-K Disclosures

The SEC issued a Proposed Rule to modernize Reg S-K disclosures to improve them for investors and simplify compliance for registrants.

Center for Audit Quality (CAQ) Issues June SEC Regs Committee Highlights

The CAQ recently issued highlights of the June 25 joint meeting between its SEC Regulations Committee and the SEC staff. Key topics discussed at the meeting are summarized here.

FASB Staff Issues Q&As on Credit Losses

In this New Developments Summary, Grant Thornton takes a look at two question-and-answer documents issued by the FASB staff to help companies implement the new credit losses guidance in ASC 326.

Audit newsletter subscriptions

New Developments Summary

Subscribe to our periodic bulletin providing a detailed summary of recent technical developments or accounting pronouncements.

On The Horizon Newsletter

Subscribe to our weekly newsletter covering developments from the FASB, AICPA, PCAOB, SEC and others.

CorporateGovernor Newsletter

Subscribe to our newsletter covering issues related to compliance, corporate governance, board member and audit committee roles and responsibilities, internal controls, risk, fraud detection and prevention, and more.

FASB Staff Addresses Lessor Inquiry

The FASB determined there are two acceptable methods to account for the impairment of operating lease receivables after a lessor has adopted ASC 842 Leases.

SEC Staff Issues Statement on LIBOR Transition

The staffs of the SEC's Division of Corporation Finance (CorpFin), Division of Investment Management (IM), Division of Trading and Markets, and Office of the Chief Accountant (OCA) issued a statement to highlight certain risks associated with the expected discontinuation of LIBOR past 2021 and to encourage market participants to proactively manage the transition away from LIBOR.

FASB Invites Comment on Guidance

The FASB recently issued an Invitation to Comment (ITC) Identifiable Intangible Assets and Subsequent Accounting for Goodwill to obtain feedback on whether and how it should amend the guidance.

FASB Proposes Deferring Some Effective Dates

The FASB decided to issue two proposed Accounting Standards Updates (ASU) that would defer the effective dates for several major standards. The following summarizes the proposed revisions to the effective dates for each major standard.

SEC Issues Final Rule to Amend Loan Provision Guidance

The SEC issued a Final Rule intended to refocus the analysis an auditor is required to complete related to potential lending relationships with shareholders of a client.

New Developments Summary: FASB Clarifies Contribution Accounting

FASB Clarifies Not-For-Profit Grant And Contribution Accounting - Many not-for-profit entities (NPFs) that receive government grants or enter into similar contracts with public bodies have reported some difficulty determining if those obligations are contributions or exchange transactions and whether they are condition or unconditional.

Emerging Issues Task Force (EITF) Discusses Three Issues at June 13 Meeting

The EITF met on June 13 to discuss the following issues:

- Issue 18-A, “Recognition under Topic 805 for an Assumed Liability in a Revenue Contract”
- Issue 19-A, “Financial Instruments — Clarifying the Interactions between Topic 321 and Topic 323”
- Issue 19-B, “Revenue Recognition — Contract Modifications of Licenses of Intellectual Property

FASB Proposes Deferral of Effective Dates for Selected Standards

The FASB issued the proposed ASU, Effective Dates, which would defer the effective dates for the recent standards on measuring credit losses on financial instruments, leases, and derivatives and hedging for smaller reporting companies, certain other public business entities, and all nonpublic business entities, such as private companies, not-for-profit entities and employee benefit plans.



Webcasts

Nonprofit Accounting, Regulatory and Uniform Guidance Update

Archive Webcast

This webcast focused on new financial reporting standards, along with a discussion of current events as it relates to recipients of Federal awards.

Win the Downturn: The Best Defense is a Great Offense

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Tax services

Our knowledgeable, nimble tax professionals help organizations assess and manage federal, state, local and international tax complexities; deal with their business realities; and prepare for tomorrow. We help companies manage a wide range of domestic and global income and non-income tax compliance burdens, as well as analyze and take advantage of appropriate planning opportunities.



Thought leadership

IRS FAQ Addresses TCJA Changes to Section 704(d)

As part of tax reform, the IRS's Section 704(d) FAQ clarifies treatment of charitable contribution and foreign taxes allocated to a partner possibly limited by 704(d).

Final Regs Offer Safe Harbor for Creditable Foreign Tax Expenditures (CTFE) Allocations

The IRS released final regulations [\[TD 9871\]](#) on July 24 regarding the allocation of a partnership's CFTEs. The rules generally adopt temporary regulations that were issued in February 2016 with minor changes and are effective immediately.

Genetic Testing May be Tax Deductible

In an IRS letter ruling, [PLR 132576-18](#), the costs of health-related genetic testing are deductible medical care expenses. In the letter ruling, the taxpayer had a healthcare flexible spending account (FSA) and sought to use the FSA to purchase genetic testing services, resultant reports, and a DNA collection kit offered by 23andMe, a for-profit genealogy company regulated by the Food and Drug Administration (FDA).

Tax newsletter subscriptions

Tax Hot Topics Newsletter

Subscribe to our biweekly e-newsletter addressing a wide range of tax regulatory, legal and legislative issues.

State and Local Thinking Newsletter

Subscribe to our monthly e-newsletter covering state and local tax developments.

Human Capital Bulletin Newsletter

Subscribe to our monthly e-newsletter addressing recent legislative, regulatory and statutory compensation and benefits issues and other human capital matters.

IRS Extends Time to File Forms 1065

The IRS has provided a six-month extension of time for certain partnerships to file a superseding Form 1065, "U.S. Return of Partnership Income," and furnish corresponding Schedules K-1.

Draft Form Issued for Nonemployee Compensation

An IRS early release draft of the 2020 [Form 1099-NEC](#) relates to payments for services performed by someone who is not an employee (nonemployee compensation or NEC).

IRS OKs Changing Some Bonus Depreciation Elections

The IRS has issued [Rev. Proc. 2019-33](#) to allow taxpayers to make or revoke an additional first-year depreciation deduction election under Section 168(k), as modified by the TCJA.

IRS: Assets-Over Merger Triggers Basis Stepdown

The IRS issued a Technical Advice Memorandum stating that the distribution of the resulting partnership's interest in an assets-over merger results in a Sect. 743 mandatory basis adjustment when the partnership has a substantial built-in loss in its assets.

U.S. Tariffs Surge Destabilizes Transfer Pricing

The recent surge in new tariffs imposed by the United States — raw steel, raw aluminum, China manufactured goods - is having an adverse impact on transfer pricing.

Dems Push State and Local Tax Deduction Workaround Rule Repeal

Democrats want to use the Congressional Review Act to force a vote on invalidating recent IRS regulations that shut down state charitable programs designed to circumvent the limitation on the SALT deduction.

September May be Pivotal for Pending Tax Bills

Trying to avoid a government shutdown this fall, Congress will have 3 weeks to negotiate a spending package — likely setting the course for this year's tax issues.

Post-Employment Payments of Compensation

Most businesses will, at some time, have to manage the difficult situation of the death of an employee. Our focus here will be on questions surrounding this employee's compensation, and how it is to be paid to a deceased employee's beneficiaries.

IRS Simplifies Insurance Company Accounting

The IRS provided simplified procedures for insurance companies to obtain automatic consent to change their methods of accounting for discounting unpaid losses or expenses.

Income Inclusion Clarified on Investment Credit Property

The IRS issued final regulations ([I.D. 9872](#)) for income inclusion when a lessee is treated as having acquired investment credit property. The final rules adopt previously issued temporary regulations without modification. They are effective as of July 17, 2019, and apply to investment credit property placed in service on or after September. 19, 2016.

IRS Expands Preventive Care Benefits for High Deductible Health Plan (HDHPs)

The IRS issued guidance in [Notice 2019-45](#) expanding the list of preventive care benefits permitted to be provided by a HDHP] without a deductible, or with a deductible below the applicable minimum deductible for HDHPs.

Budget and Debt Ceiling Deal Puts Tax Legislation in Limbo

Congress and the White House agreed on a deal to set new spending caps and raise the debt ceiling earlier than expected, eliminating two potential vehicles for renewing the temporary tax provisions known as extenders and technical corrections to the Tax Cuts and Jobs Act (TCJA).

Ruling Allows Revocation of Microcaptive Status

The IRS consented to a taxpayer request to revoke the election for a captive insurance company to be taxed as a “microcaptive” under Section 831(b).

House Approves Pension Rescue Bill

The House of Representatives approved the Rehabilitation for Multiemployer Pensions Act July 24. The bill establishes the Pension Rehabilitation Administration (PRA), a new agency housed within the Department of Treasury that will be authorized to grant loans to financially troubled multi-employer pension plans.

Proposed Rules for Passive foreign Investment Company (PFIC) Provide Clarity

The new set of proposed rules under Sections 1291, 1297 and 1298 contain a mix of taxpayer-favorable and taxpayer-unfavorable provisions, and provide clarity with respect to a number of questions that have long been a point of uncertainty for taxpayers.

House Bill Offers Refunds to Same-Sex Couples

The House of Representatives passed the Promoting Respect for Individuals Dignity and Equality (PRIDE) Act ([H.R. 3299](#)) by voice vote on July 24.

Senate Approves Four Tax Treaty Protocols

The Senate voted overwhelmingly to ratify four tax treaty protocols that had languished for more than a decade.

Gross Receipts Unnecessary for Section 195 Active Trade or Business Test

The Tax Court held in *Smith v. Commissioner* ([No. 12354-17S](#)) that business deductions were not limited by Section 195 because the taxpayer began to engage in an active trade or business in the year at issue.

Amended Post-Retirement (Voluntary Employees’ Beneficiary Association) VEBAs Can Fund Current Medical Benefits

The IRS ruled in [No. 17-14975](#) that amendments to two trusts to allow for the provision of pre- and post-retirement medical benefits to employees would result in income recognition under the tax benefit rule.

Employee Status Barred for Partnership Partners Owning a Disregarded Entity (DRE)

The IRS released final regulations ([TD 9766](#)) regarding the employment tax treatment for partners of a partnership that owns a DRE. The final regulations finalize temporary regulations issued in May 2016.

Proposed Regulations for Multiple Employer Plan (MEPS) Would Protect Compliant Employers

The IRS recently issued proposed regulations ([REG-121508-18](#)) that would protect employers participating in a MEP from a noncompliant employer by requiring a spinoff.

In a Taxing Tax World, Strategy Ascends

It's a taxing tax world out there. With EU initiatives and the U.S. Tax Cuts and Jobs Act (TCJA) of 2017, the landscape is rife with complexities that have transformed how companies view their tax function. Long gone are the days when a manual spreadsheet would suffice.

Partnership Transaction Costs Present Challenges

This article discusses key concepts to consider when analyzing the federal income tax treatment of transaction costs incurred by a partnership or its partners.

Finding Your Benefits in Estate Tax Planning

Many taxpayers aren't approaching estate tax planning with the same urgency following enactment of the Tax Cuts and Jobs Act (TCJA). Read our article on benefits in Estate Tax Planning.

Section 4960 Excise Taxes: Lessons Learned

IRC Section 4960 enacted as part of the Tax Cuts and Jobs Act (TCJA) imposes a 21% excise tax on tax-exempt organizations that pay their highest-paid employees (covered employees) remuneration in excess of \$1 million or parachute payments (compensation contingent on separation from employment) equal to at least three times a covered employee's average pay. The new taxes are effective for taxable years beginning after 2017.

IRS Issues Final Regulations On Health Reimbursement Arrangements (HRAs)

The IRS, along with the Departments of Labor, and Health and Human Services, issued final regulations ([84 FR 28888](#)) on HRAs and other account-based group health plans.

Tax Treaties Finally Score Chance to Move

The Senate Foreign Relations Committee scheduled a meeting for June 25 to prepare the four protocols for Senate floor action. The three tax treaties are also expected to get committee considerations soon if the issues related to the enactment of the Tax Cuts and Jobs Act can be resolved.

IRS: Liquidation Possible Despite Subsequent Assets Transfer

IRS: Proposed transactions could qualify as Section 332 liquidations despite a portion of the liquidating corporation assets transferred to another corporation.

Temporary Regs Address Section 245A Loophole

IRS issues temporary regulations addressing 245A loophole. For more details check the newsletter.

Personal Brand Compensation Subject to Self-Employment Tax

The U.S. Tax Court held in *Slaughter v. Commissioner* ([T.C. Memo. 2019-65](#)) that royalty payments related to an author's personal brand are subject to self-employment tax.

IRS Finalizes Rules on Charitable Gift State and Local Tax Workaround

The IRS has finalized regulations that shut down strategies using state charitable programs to avoid the cap on state and local tax (SALT) deductions, but also offered relief for taxpayers who would lose both their charitable and SALT deductions under the rules.

Organization for Economic Co-operation and Development (OECD) Work Plan on Taxing Digital and Global Profits Approved

The Organization for OECD released the Program of Work to Develop a Consensus Based Solution to the Tax Challenges Arising from the Digitalization of the Economy on May 31. The work plan was agreed to by the Inclusive Framework on Base Erosion and Profit Shifting (BEPS) and presented to the G20 Finance Ministers meeting in Japan on June 8 and 9.

Appeals Court Sides With Taxpayer in U.S. Office Rule Case

The D.C. Circuit Court of Appeals affirmed the Tax Court in *Grecian Magnesite Mining v. Commissioner* ([No. 17-1268](#)) on June 11, holding that for purposes of the U.S. office rule, the redemption of a U.S. partnership interest should be deemed to have taken place where it occurred rather than the location of the activities underlying appreciation of the redeemed interest.

Proposed Regulations Implement Section 199A 'Grain Glitch' Fix

The IRS issued proposed regulations ([REG-118425-18](#)) on June 18 that provide guidance to cooperatives, specified agricultural and horticultural cooperatives and their patrons regarding the deduction for qualified business income (QBI) under Section 199A(a), the reduction to the QBI deduction under Section 199A(b)(7), and the deduction for domestic production activities under Section 199A(g).

How Blockchain Could Transform Intercompany Transfers

Efficiency reduced costs and risk mitigation are just three benefits of applying blockchain technology to intercompany transfers.



Tax Reform: The Road Ahead for Real Estate - Tax Benefits of Investing in Opportunity Zones

Archive Webcast

Grant Thornton's Washington National Tax Practice and Real Estate Industry Practice professionals will be hosting a webcast on the Opportunity Zone program, which continues to encourage investment in economically distressed communities by offering real estate investors significant tax incentives. This webcast will explore how the investment landscape has changed after two years, and discuss strategies for making investments in real estate before the 2019 deadline.

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Industries





Asset management

Macroeconomic pressures, increased compliance burdens and continued regulatory uncertainty are transforming the asset management industry. For firms, advisers and fund managers that can adapt to the new industry structure and meet regulatory and investor expectations, there are promising opportunities — but also a new set of risks.



Thought leadership

Amid Disruption Asset Managers Tackle C-word

The asset management industry is focusing on improving key elements of culture as a way of facing major disruptions ranging from a technology evolution to new fee structures and pressures.

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Boost Customer Loyalty Through Personalization

Companies today have massive amounts of data — about their customers, their prospects, and the types of products and services that sell well and those that don't. Your data can help you treat customers as individuals, earning their loyalty and driving company growth.

Market Intelligence Update — Preparing for an Economic Downturn

Grant Thornton's Chief Economist Diane Swonk and Performance Improvement Practice Leader Robert Schwartz discuss the potential for an economic downturn its effect on clients and how Grant Thornton can help companies prepare.



Webcasts

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Banking and securities

In this time of increased public scrutiny and complex regulatory demands, banks, thrifts and other financial institutions need straightforward business guidance, delivered ethically and professionally. The industry is experiencing challenging regulations, increased competition and technology disruption, forcing banks to continually re-evaluate their operating model to ensure sustainable growth.



Thought leadership

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Energy

Demands for more secure sources of energy are a daily occurrence in the energy industry. Price volatility, political and economic pressures, risk management practices, availability of drilling rigs, and access to talent can greatly affect the way energy companies conduct business. The impact of these trends is forcing many companies to find more efficient ways of operating and controlling costs.



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Healthcare and life sciences

Healthcare is under the microscope of providers, policymakers, insurers and employers. Rising insurance costs, reduced Medicare and Medicaid reimbursements, industry consolidation, stricter regulations and providing the highest level of patient care present major challenges to growth. Given this landscape, healthcare and life sciences companies require complex compliance and risk management programs to address changing legislative, political and market conditions.



Thought leadership

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European Union Medical Device Regulations (EUMDR)/ In Vitro Diagnostic Regulations (IVDR): Countdown to 2020 and Beyond. Are you Ready?

Archive Webcast

This first webcast of a two-part series will address the European Union regulations that begin to come into effect in 2020 and the immediate and long term challenges ahead for medical device and in vitro diagnostic companies. Presenters will describe tactical ideas and options you can include in your plan and approach, while unpacking key strategies to protect your company and maintain compliance along the journey.



Higher education

For the higher education sector, fiscal responsibility and operational effectiveness have become as important as academic quality and other mission-related priorities. Many institutions struggle to meet enrollment and net tuition targets, to make effective use of physical assets, and to respond to competition from traditional and nontraditional education channels. Despite these challenges, leaders at colleges and universities have new opportunities to move their institutions forward toward ever greater success.



Thought leadership

Taxpayer First Act Brings Filing Changes for Tax-Exempts

The Taxpayer First Act ([H.R. 3151](#)), signed into law on July 1, 2019, will soon require all tax-exempt organizations to electronically file their annual Forms 990, 990-PF, 990-EZ, and 990-T. Section 527 organizations will also have to e-file their Forms 8872 (periodic contribution and expenditure reports).

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FASB Clarifies Not-For-Profit Grant And Contribution Accounting - Many not-for-profit entities (NPFs) that receive government grants or enter into similar contracts with public bodies have reported some difficulty determining if those obligations are contributions or exchange transactions and whether they are condition or unconditional.

Insights for Higher Education Institutions

Join our Board and Executive Institute

Subscribe to receive first access to our annual *State of the Not-for-Profit Sector* and *State of Higher Education* reports, articles, alerts, and webcasts and other events. We are committed to helping you stay up-to-date on current and emerging industry trends, developments and best practices.



Webcast

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Sponsorships and events

EDUCAUSE Annual Conference

October 14—17, 2019

Chicago, IL

Grant Thornton is exhibiting at the EDUCAUSE 2019 Annual Conference that showcases the best thinking in higher education IT. This premier higher ed IT event brings together professionals and technology providers from around the world to share ideas, grow professionally, and discover solutions to today's challenges.



Insurance

The insurance industry has seen major changes over the past few decades. Stricter rules and regulations, faster globalization and consolidation, and sophisticated new technologies are putting pressure on insurers to make large investments in infrastructure while maintaining adequate capital.



Thought leadership

Boost Customer Loyalty Through Personalization

Companies today have massive amounts of data — about their customers, their prospects, and the types of products and services that sell well and those that don't. Your data can help you treat customers as individuals, earning their loyalty and driving company growth.

IRS Simplifies Insurance Company Accounting

The IRS provided simplified procedures for insurance companies to obtain automatic consent to change their methods of accounting for discounting unpaid losses or expenses.

IRS Issues Final Regulations On Health Reimbursement Arrangements (HRAs)

The IRS, along with the Departments of Labor, and Health and Human Services, issued final regulations (84 FR 28888) on HRAs and other account-based group health plans.

How Blockchain Could Transform Intercompany Transfers

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Sponsorships and events

2019 Insurance Internal Audit Group (IIAG) Fall Conference

October 2-4, 2019

Philadelphia, PA

Grant Thornton is a proud sponsor of the Annual Conference of IIAG. The conference provides its members with the opportunity to keep abreast of current events and expand their knowledge and skills in the field of Insurance Internal Auditing. This is an opportunity to exchange audit ideas and techniques, learn about new products and develop consultative relationships with your associates.



Manufacturing

U.S. manufacturing is experiencing a transformation, marked by trends such as advanced technologies and complex business models. Current issues affecting manufacturers include global, political and economic headwinds, industry contraction, cyberrisk, supply chain performance, and a changing regulatory environment. Today's manufacturers are smarter, leaner and more nimble than ever, but they still have work to do to prepare for tomorrow.



Thought leadership

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Manufacturing survey subscription

Maximizing Your Supply Chain

Subscribe to receive survey results and insight from C-suite manufacturing executives about the issues that affect management and strategies for optimizing today's supply chains.

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Trade and Tariffs: Implications for Manufacturers

Archive Webcast

What current and discussed policies are impacting manufacturers and their supply chains? Grant Thornton's Manufacturing leaders break down the landscape for manufacturers.

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Not-for-profit

In this era of decreased funding and increased public and private scrutiny, nonprofits are in an especially vulnerable position as they work to sustain and grow their missions. Many are wrestling with issues such as corporate governance, the need for technology upgrades, strategic revenue enhancements or cost-reduction opportunities, strong accounting practices due to regulatory scrutiny, and more.



Thought leadership

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Private equity

Private equity (PE) firms are operating in an increasingly uncertain environment. The competition is changing, as industries transform and regulatory scrutiny increases. Against this backdrop, PE firms are challenged to find and balance buy- and sell-side opportunities while maintaining focus on growing sustainable value at their portfolio companies. They must manage talent, operations, risks and fiduciary responsibilities at the fund and portfolio levels.



Thought leadership

Preserve Portfolio Value in Distressed Times

Preserving private equity portfolio company value in distressed situations requires a comprehensive analysis. This article outlines the key steps you should take.

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Webcast

Trending Topics for PE Funds: International Deals

October 22, 2019

Private equity firms all know that the international environment is full of complexity. This webcast was about current issues that should be considered when acquiring international companies such as GILTI, BEPS, other international regulation and culture. Our team of private equity specialists will explain the nuances of these tax and regulatory matters in plain English.

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Public sector

Government leaders today are continually required to do more with less. The need to effectively operate in an environment with tighter budgets and increasing demands for services is an ongoing challenge. Similar to other high-performing organizations, the government needs to improve performance and streamline operations and strategic decision-making.



Thought leadership

Get Full-Spectrum Enterprise Risk Management (ERM) by Integrating Fraud Risk

To minimize fraud risk and maximize compliance federal agencies can leverage current capabilities to create an integrated risk framework to implement fraud risk management in ERM.

Integrate and Plan Through Investment Management

Planning by government organizations can be realistic with a view of the complete picture of activities to be conducted. The picture is complete when it includes essential information — scopes, schedules, costs, funding, risks and staffing. The rendering of activities and information is integrated management.

Seize the Data to Power Your Federal Agency

Federal agencies can find out more about harnessing your data resources to improve the policies you implement and the programs you administer by reading a new report by Grant Thornton and the Partnership for Public Service.



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Real estate

With the real estate industry rebounding, opportunities and challenges are plentiful. Regulators continue to work on changes to revenue recognition and lease accounting, and the Foreign Account Tax Compliance Act and the Dodd-Frank Wall Street Reform and Consumer Protection Act are affecting the way real estate companies do business. At the same time, access to capital is limited, as many banks are unable or unwilling to lend due to their own financial challenges and new regulations.



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Webcast

Tax Reform: The Road Ahead for Real Estate - Tax Benefits of Investing in Opportunity Zones

Archive Webcast

Grant Thornton's Washington National Tax Practice and Real Estate Industry Practice professionals will be hosting a webcast on the Opportunity Zone program, which continues to encourage investment in economically distressed communities by offering real estate investors significant tax incentives. This webcast will explore how the investment landscape has changed after two years, and discuss strategies for making investments in real estate before the 2019 deadline.

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Retail

The highly competitive nature of the retail sector means retailers face unique challenges. Growth of e-commerce is a major force to be reckoned with for the industry, particularly in the area of mobile commerce. Digital technologies are collapsing once-steep barriers to entry within the industry, as new direct-to-consumer players are taking market share from traditional retailers. Furthermore, the rapidly evolving customer experience is leading retailers to re-evaluate their strategies, especially as consumers desire to shop seamlessly across physical and virtual storefronts.



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Technology

The technology industry thrives on rapid and constant innovation. Cloud computing, social networks and mobile applications are only some of the new developments that are driving global, social and economic change. The proliferation of mobile devices and apps are two of the most visible contributions to worldwide interactivity and information-sharing. Growing competition and rapidly changing customer expectations are forcing many communications and media companies to continuously push the technology envelope.



Thought leadership

Market Intelligence Update — Interview with Consumer Technology Association

Listen to Nichole Jordan and Steve Koenig discuss emerging technology trends and key questions for management and the board.

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Technology update subscription

Insights for Technology Companies

Subscribe to receive updates on current issues and legislation across many sectors of the technology industry, including: software/hardware, communications, digital media and more.

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When Software as a Service (SaaS) Grows Up

SaaS has changed our perception of software, and the changes haven't stopped. The SaaS market is expanding. Statista projects that it will reach \$130 billion next year – more than double its size in 2014.



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North Central Oracle Apps User Group (NCOAUG)

August 1, 2019

Archive Webcast

NCOAUG 19 helps you find practical solutions to today's business technology challenges and provides information on how to best leverage your Oracle investment.

RECONNECT 2019

Archive Webcast

RECONNECT 19 helps you find practical solutions to today's business technology challenges and provides information on how to best leverage your PeopleSoft investment. Grant Thornton was proud to exhibit and speak at RECONNECT 19.

Business Issues





Culture and talent

Transforming an organization's culture at strategic moments, whether during an integration or implementation of a new long-term strategy or to simply stay competitive, can challenge even the most progressive organizations. Sustaining a strong culture requires work from everyone, but especially from senior leadership. By modeling and reinforcing the best possible behavior, employees will be better prepared to navigate uncertainty and support their organization's mission.



Thought leadership

Amid Disruption, Asset Managers Tackle the C-Word

While asset management firms may once have opted to ignore culture, throwing up their hands when it came to creating a distinct culture or larger purpose, today's organizations recognize that organizational culture ranks right alongside fund performance or financial metrics in terms of importance.

Quality Culture: Beyond Compliance to Improvement

In an industry facing increasing competition, regulations, customer demands and a mandate for innovation, today's life sciences leaders are committed to cultivating a culture of quality that transcends compliance to serve as a clear competitive differentiator.

Newsletter subscription

Human Capital Bulletin Newsletter

Subscribe to our monthly e-newsletter addressing recent legislative, regulatory and statutory compensation and benefits issues and other human capital matters.

Amid Disruption Asset Managers Tackle C-word

The asset management industry is focusing on improving key elements of culture as a way of facing major disruptions ranging from a technology evolution to new fee structures and pressures.

Reimagining Manufacturing: A Culture Makeover

The time is now for a manufacturing culture makeover. Faced with a dire labor shortage an aging workforce and the need to digitally transform in order to compete today's manufacturing companies must focus on closing the perception gap not just the skills gap.



Growth and value creation

Ninety percent of companies grow for one year, but only 8% can do it five years in a row. Why? Because sustained growth means new markets, new processes, new regulatory issues, and new ways of operating, all of which may introduce risk and delay success. For dynamic organizations to fully achieve their objectives, financial measures and process efficiencies, new ways of working and stakeholder relationships must grow.



Thought leadership

Take off With Strategic Enterprise Asset Management (EAM)

EAM has the power to shape decisions at the top, but it needs to be informed by data from the front line regarding an organization's assets throughout their life cycle. Strategic EAM can drive planning, executing and tracking of maintenance activities across departments and locations to optimize return on investment. If done wisely, EAM can promote significant savings.

To Grow Sustainably Know Your Customers

To accelerate your company growth, make understanding your customers, both existing and potential, the central purpose. This understanding is informed by customer segmentation based on behaviors and values, not just demographics, and by journey mapping that defines how to invest in meeting expressed needs.

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7 Tips for Steering a Path Through Disruption

Where will the next Amazons pop up in your industry? See 7 tips for navigating a business landscape constantly disrupted by emerging technologies and other forces.

Move Digital From Center Stage to Backstage

It used to be that “digital” meant cutting edge, speed and high tech. Today, however, digital applies to just about everything and is integrated so seamlessly into our lives, from the music we listen to, the shows we watch, the purchases we make and the apps and programs we can’t live or work without. So the obvious question is, what’s next?

Are You Watching The Wrong Metrics for Agile?

Agile methodologies have become the standard approach for projects that face today’s evolving business needs, according to an online survey of development and IT professionals. Agile methodologies have a dynamic adaptability that is often critical for projects driving digital transformation.

Reimagining Manufacturing: A Culture Makeover

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How Data Can Drive Oil, Gas and Power

In the energy industry, many organizations have been waiting to adopt or invest in new technology but time is running out. New technologies are paying off for the competition and now enabling companies to maximize recoveries, profits and leading to larger investments.

How Blockchain Could Transform Intercompany Transfers

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Technology Investment Trends in the Energy Industry

Archive Webcast

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Leveraging technology

Today's organizations are working differently — they are facing global competition, changing customer and employee expectations, evolving regulation and more. The strategic application and use of technology can often help companies drive innovation and competitive advantage. Today's technologies, including cloud, social media and the internet of things, can accelerate business performance and help companies gain visibility into their operations and derive actionable insights to efficiently achieve their objectives.



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Automation Favors Clients Over Administration

Dedicate more time to clients and less to administration; integrate Oracle systems to increase customer service and improve decision-making to drive business.

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Risk management

In today's ever-changing business environment of market complexity, globalization and increasing investor expectations, managing risk while protecting value is more important than ever. Companies understand the need to be more proactive in managing their risk to mitigate losses, reduce the risk of reputational damage and more. Leading organizations will find ways to harness risk to help grow their business and achieve exceptional performance.



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Operationalizing Data Privacy Through Identity-Centric Discovery **Archive Webcast**

Regulations like the General Data Protection Regulation (GDPR) and California Consumer Privacy Act (CCPA) are shifting traditional data privacy and security responsibilities; creating more operational requirements and processes for direct interaction with consumers. Grant Thornton and BigID will be discussing how personal data discovery can be leveraged to address the growing number of data privacy mandates such as sensitive data identification and protection; data subject rights fulfillment, and breach notification and response.



Washington impact

Only time will tell what the Trump administration really means for business. Many companies are patiently waiting to see how his policies will affect their industry — from trade to tax reform, health care and more. Although there's uncertainty surrounding the administration's policy agenda, business leaders are anticipating his policies with both curiosity and cautious optimism.



Thought leadership

Dems Push State and Local Tax Deduction Workaround Rule Repeal

Democrats want to use the Congressional Review Act to force a vote on invalidating recent IRS regulations that shut down state charitable programs designed to circumvent the limitation on the SALT deduction.

September May be Pivotal for Pending Tax Bills

Trying to avoid a government shutdown this fall, Congress will have 3 weeks to negotiate a spending package — likely setting the course for this year's tax issues.

IRS Expands Preventive Care Benefits for High Deductible Health Plan (HDHPs)

The IRS issued guidance in Notice 2019-45 expanding the list of preventive care benefits permitted to be provided by a HDHP] without a deductible, or with a deductible below the applicable minimum deductible for HDHPs.

Budget and Debt Ceiling Deal Puts Tax Legislation in Limbo

Congress and the White House agreed on a deal to set new spending caps and raise the debt ceiling earlier than expected, eliminating two potential vehicles for renewing the temporary tax provisions known as extenders and technical corrections to the Tax Cuts and Jobs Act (TCJA).

Tax Treaties Finally Score Chance to Move

The Senate Foreign Relations Committee scheduled a meeting for June 25 to prepare the four protocols for Senate floor action. The three tax treaties are also expected to get committee considerations soon if the issues related to the enactment of the Tax Cuts and Jobs Act can be resolved.



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