

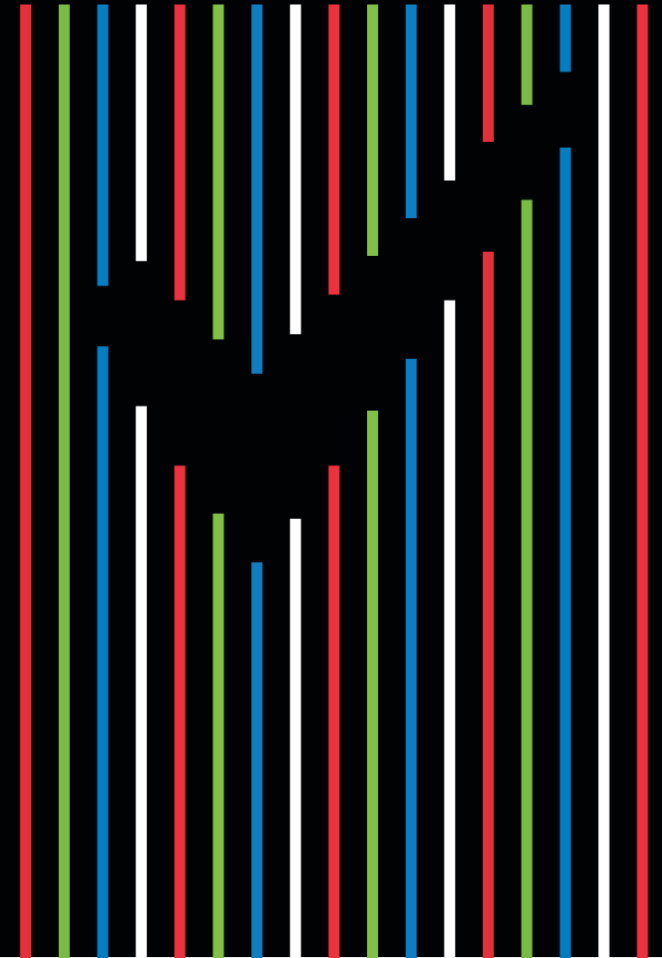


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Exclusive Peer Roundtable for CAT Dealers – Sales & Use Tax

Prospectus

Event: June 18, 2026
Microsoft, Las Colinas
Irving, TX



In a complex, highly regulated industry, it's difficult to be sure about tax compliance

Practical insights. Real-world perspectives. Dealer-to-dealer dialog.

- Join a small group of CAT Dealer peers for an invite-only roundtable focused on the **real challenges, opportunities, and decisions** facing finance and technology leaders today.
- This is a **collaborative, off-the-record forum** designed for open discussion, shared learning, and meaningful connections - without presentations or sales pitches.

Who should attend?

- **CAT Dealers who want to learn from one another**, exchange practical perspectives, and hear directly from peers.
- Finance/tax, IT, and operational leaders
- ERP, consolidation, reporting, and planning stakeholders
- Dealers evaluating or optimizing enterprise systems

NOTE: Each organization may register **1-2 participants** to keep conversations balanced and impactful.

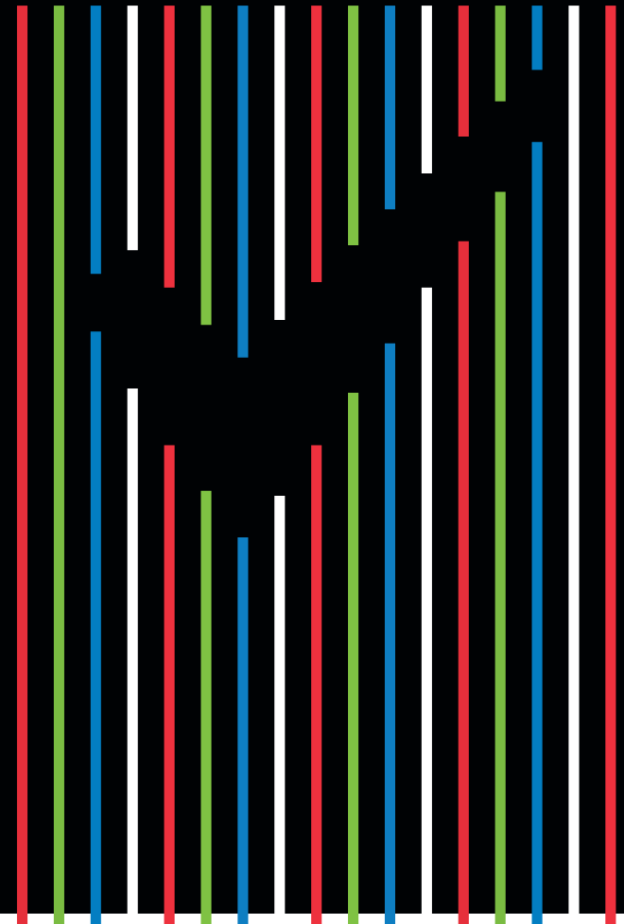
This is not a marketing event. It is infrastructure for **trusted dealer knowledge exchange**.

CAT Dealer Peer Roundtable: *Why participate?*

Why Dealers value this experience?

- ✓ **Peer-to-peer discussion** with other CAT Dealers facing similar realities
- ✓ Practical insights you can apply immediately - not theory or sales talk
- ✓ Candid conversation around **what's working, what's challenging, and what's next**
- ✓ A chance to step back, reflect, and learn in a trusted environment

This is a forum for sharing, listening and learning alongside your peers.



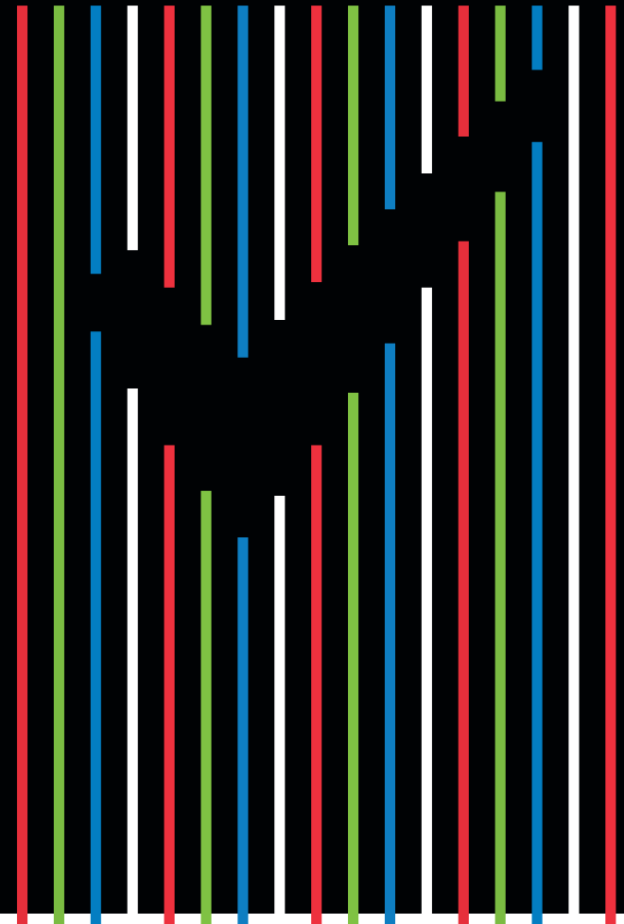
CAT Dealer Peer Roundtable:

Conversation themes (driven by participants)

While the discussion is open and interactive, common areas of focus include

- ✓ Tax complexity – top issues in 2026
- ✓ Multistate sales & use tax exposure
- ✓ Use tax challenges specific to CAT dealers
- ✓ Audit preparedness and defense
- ✓ What scales and what breaks across entities and systems
- ✓ Lessons learned from recent transformation efforts
- ✓ What dealers would do differently - or do again

The agenda will flex around what matters most to the group in the room.



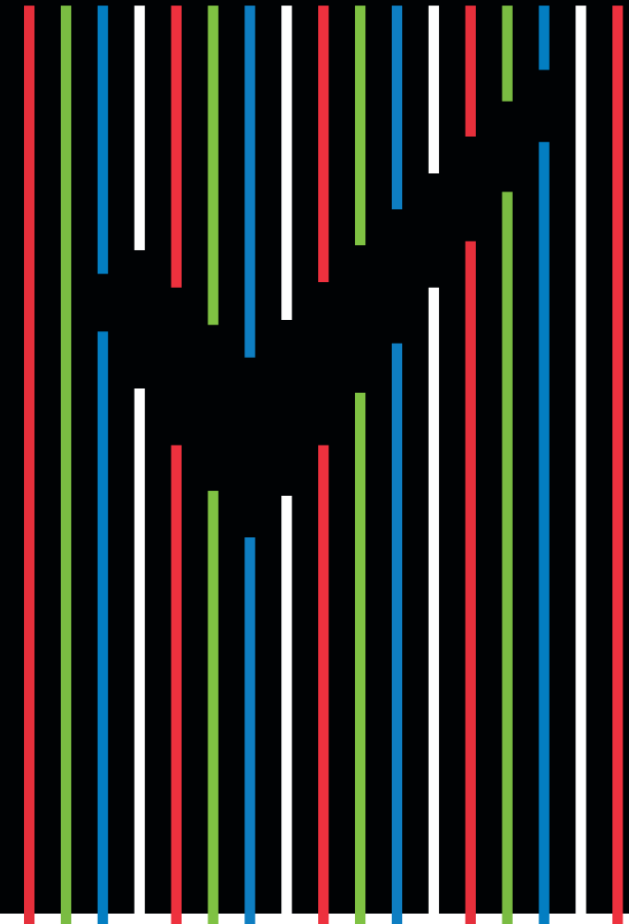
CAT Dealer Peer Roundtable:

A truly exclusive setting

Intentionally small. Highly relevant.

- Participation is **limited** to maintain a high-quality, peer-only experience
- Attendees will receive an **exclusive, event-customized gift**
- Designed to foster candid discussion and meaningful networking

This is not a conference - it's a **focused roundtable** built for connection and relevance.



Logistics at a Glance

June 18 agenda

3:00–5:30 PM

Networking & Peer Roundtable Discussion

5:45–7:30 PM

Dinner (location TBD)

What to Know

- **No cost to attend**
- Space is limited; early confirmation is encouraged
- Registration requests are reviewed to ensure the right mix of participants
- Our goal is to create a room where **every voice added strengthens the discussion.**

Main venue

Microsoft Las Colinas

7000 N State Hwy 161

Irving, TX 75039

LC1/4107 (Room)





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Reserve your spot: CAT Dealer *Exclusive Peer Roundtable*

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Join us:

Please RSVP on or before May 18th to the following contacts:

- Karen McPhillips, Director of Marketing, karen.mcphillips@wolterskluwer.com
- Kat Franklin-Kent, CAT Peer Roundtable Event, kat.franklin-kent@wolterskluwer.com
- Kristine Eberhart, Partner Manager, Kristine.eberhart@wolterskluwer.com

