

# TEGE | EXEMPT ORGANIZATIONS COUNCIL



## **2019 ANNUAL EXEMPT ORGANIZATIONS UPDATE**

**Making a difference with conversations since 1993.**

**University of Baltimore  
Baltimore, Maryland  
February 21-22, 2019**

**Register for the Annual Meeting and other upcoming programs at:  
[www.eocouncil.org/events](http://www.eocouncil.org/events)**

***Presented in cooperation with D.C. Bar Continuing Legal Education and  
The Greater Washington Society of CPAs***



**ANNUAL MEETING AGENDA – February 21-22, 2019**

William H. Thumel Sr. Business Center – 11 W. Mt. Royal Ave., Baltimore, Maryland

**\*\*All programs in William H. Thumel Sr. Business Center Auditorium, except as noted\*\***

**Thursday, February 21, 2019**

11:00 pm - 1:00 pm	<b><u>TEGE EO Council Board of Directors Meeting</u></b> (Board of Directors and Chairs only)
12:00 pm - 12:45 pm	<b><u>Program Attendee Check-In</u></b> (William H. Thumel Sr. Business Center Atrium)
12:50 pm - 1:00 pm	<b><u>Welcome and Introductions</u></b>
1:00 pm - 2:30 pm	<b><u>State Regulation of Charitable Organizations</u></b>  <i>Speakers: Karen Gano, Assistant Attorney General, Connecticut          James Sheehan, New York Attorney General's Office</i> <i>Moderator: Greg Lam, Copilevitz &amp; Canter</i>
2:30 pm - 2:45 pm	<b><u>Break</u></b>
2:45 pm - 4:15 pm	<b><u>EO Hot Topics Roundtable</u></b>  <i>Speakers: Cass Brewer, Georgia State University          Eve Borenstein, BAM Law Office          RSM Washington National Tax Exempt Organizations Leader</i> <i>Moderator: Ogochukwu Anokwute, Deloitte Tax, LLP</i>
5:30 pm - 7:00 pm	<b><u>Exempt Organizations Cocktail Reception / Networking</u></b> (La Scala, Inner Harbor, Baltimore)
7:00 pm - 9:00 pm	<b><u>Exempt Organizations Dinner</u></b> (La Scala, Inner Harbor, Baltimore)

**Friday, February 22, 2019**

7:00 am - 7:45 am	<b><u>Check-In &amp; Continental Breakfast</u></b> (William H. Thumel Sr. Business Center Atrium)
7:45 am - 8:00 am	<b><u>Welcome and Introductions</u></b>
8:00 am - 9:00 am	<b><u>Remarks from the Director of Exempt Organizations</u></b>  <i>Speaker: Margaret Von Lienen, Director, Exempt Organizations, IRS</i> <i>Moderator: Meghan Biss, Caplin &amp; Drysdale (formerly Sr. Technical Adviser to Director of EO)</i>

**Presented in cooperation with D.C. Bar Continuing Legal Education and  
 The Greater Washington Society of CPAs**



9:00 am - 9:05 am	<b><u>Break</u></b>
9:10 am – 11:10 am	<p><b><u>View of the Sector + Practical Guidance for EOs Navigating the Post TCJA World</u></b></p> <p><i>Speakers:</i> Janine Cook, Deputy Associate Chief Counsel (EEE), IRS  Elinor Ramey, Attorney Advisor, Office of Tax Policy, Treasury (<b>Invited</b>)  Meghan Biss, Caplin &amp; Drysdale (formerly Sr. Technical Adviser to Director of EO)  Vicky Tsilas, Ballard Spahr LLP (formerly Attorney Advisor, Treasury, and Branch Chief, Office of Chief Counsel, IRS)  Jane Searing, Clark Nuber</p> <p><i>Moderator:</i> Robert Wexler, Adler &amp; Colvin</p>
11:10 am - 11:20 am	<b><u>Break</u></b>
11:20 am - 12:20 pm	<p><b><u>IRS Examinations Update</u></b></p> <p><i>Speakers:</i> Maria Hooke, Director, EO Examinations, IRS  Mike Engle, BKD  Jennifer Breen, Morgan, Lewis &amp; Bockius LLP</p> <p><i>Moderator:</i> Cathy Livingston, Jones Day</p>
12:20 pm - 1:00 pm	<b><u>Lunch</u></b> (William H. Thumel Sr. Business Center Atrium)
1:00 pm - 2:00 pm	<p><b><u>4960 and Executive Compensation Issues for Exempt Organizations</u></b></p> <p><i>Speakers:</i> Andrew Holubeck, Office of Associate Chief Counsel (TEGE)  Chelsea Rubin, Office of Associate Chief Counsel (TEGE)  John Richards, Office of Associate Chief Counsel (TEGE)  Tom Hyatt, Dentons  Sharon Lincoln, Casner &amp; Edwards</p> <p><i>Moderator:</i> Jeff Frank, Deloitte</p>
2:00 pm - 2:15 pm	<b><u>Break to Move to Breakout Sessions</u></b>
	<b><u>BREAKOUT SESSIONS</u></b>
2:15 pm - 3:15 pm	<p><b><u>Breakout: Healthcare Update</u></b> (TBD)</p> <p><i>Speakers:</i> Preston Quesenberry, KPMG (formerly Office of Associate Chief Counsel, IRS)  Stephen Clarke, Ernst &amp; Young LLP (formerly Project Manager, Guidance Group Manager, IRS TEGE)</p>
2:15 pm - 3:15 pm	<p><b><u>Breakout: Donor Advised Funds</u></b> (TBD)</p> <p><i>Speakers:</i> Amber MacKenzie, Office of Associate Chief Counsel (TEGE), IRS  Ruth Madrigal, Steptoe (formerly Attorney Advisor, Treasury)  J. Bradley Britton, The Columbus Foundation  Roger Colinvaux, Professor, Catholic University of America, Columbus School of Law</p> <p><i>Moderator:</i> Jennifer Becker Harris, Clark Nuber</p>

**Presented in cooperation with D.C. Bar Continuing Legal Education and  
The Greater Washington Society of CPAs**



GWSCPA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org). \*\*Please see the following page for CPE Details\*\*

- Title Name:** Exempt Organization Program
- Date & Time:** February 21, 2019 1:00 PM - 4:15 PM EDT  
February 22, 2019 8:00 AM - 3:15 PM EDT
- Time:** 540 minutes
- Recommended CPE:** 10.8 credit hours
- Delivery Method:** Group Live - Limit 160 registrants  
University of Baltimore  
William H. Thumel Sr. Business Center  
11 W. Mt. Royal Ave., Baltimore
- Total Price:** \$235 before January 31; \$285 after January 31
- Registration Method:** <http://www.eocouncil.org/events.html>
- Field of Study:** Taxes
- Learning Objectives:** Explore in detail the latest statutory, regulatory and judicial developments impacting tax exempt organizations.
- Speakers:** See agenda above.
- Advanced Preparation:** None.
- Prerequisites:** None.
- Program Content:** This year's program will bring together current and former IRS and government regulators and private practitioner in the legal and accounting industries to discuss the latest statutory, regulatory and judicial developments impacting tax exempt organizations.
- Program level:** Overview.
- Continuing Legal Education Status:** Application to be submitted
- Recommended Continuing Legal Education:** 9.0 credit hours
- Continuing Legal Education Program Level:** Intermediate

*Presented in cooperation with D.C. Bar Continuing Legal Education and  
The Greater Washington Society of CPAs*