

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**

***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	<u>TEGE EO Council Board of Directors Meeting</u> (Board of Directors and Chairs only)
12:00 pm - 12:45 pm	<u>Program Attendee Check-In</u> (William H. Thumel Sr. Business Center Atrium)
12:50 pm – 1:00 pm	<u>Welcome and Introductions</u>
1:00 pm - 2:30 pm	<u>State Regulation of Charitable Organizations</u> <i>Speakers: Karen Gano, Assistant Attorney General, Connecticut James Sheehan, New York Attorney General's Office</i> <i>Moderator: Greg Lam, Copilevitz & Canter</i>
2:30 pm - 2:45 pm	<u>Break</u>
2:45 pm - 4:15 pm	<u>EO Hot Topics Roundtable</u> <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	<u>Exempt Organizations Cocktail Reception / Networking</u> (La Scala, Inner Harbor, Baltimore)
7:00 pm - 9:00 pm	<u>Exempt Organizations Dinner</u> (La Scala, Inner Harbor, Baltimore)

Friday, February 22, 2019

7:00 am - 7:45 am	<u>Check-In & Continental Breakfast</u> (William H. Thumel Sr. Business Center Atrium)
7:45 am - 8:00 am	<u>Welcome and Introductions</u>
8:00 am - 9:00 am	<u>View of Sector: Government Shutdown</u> <i>Speakers: Meghan Biss, Caplin & Drysdale (formerly Sr. Technical Adviser to Director of EO) Preston Quesenberry, KPMG (formerly Office of Associate Chief Counsel, IRS) Vicky Tsilas, Ballard Spahr LLP (formerly Attorney Advisor, Treasury, and Branch Chief, Office of Chief Counsel, IRS)</i>

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9:05 am - 9:15 am	<u>Break</u>
9:15 am - 10:45 am	<p><u>Practical Guidance under the TCJA</u></p> <p><i>Speakers: Meghan Biss, Caplin & Drysdale (formerly Sr. Technical Adviser to Director of EO) Jane Searing, Clark Nuber</i></p> <p><i>Moderator: Robert Wexler, Adler & Colvin</i></p>
10:45 am - 11:00 am	<u>Break</u>
11:00 am - 12:00 pm	<p><u>Examinations Update</u></p> <p><i>Speakers: Mike Engle, BKD Jennifer Breen, Morgan, Lewis & Bockius LLP Former IRS EO Exam Agent and Manager, TBD (Invited)</i></p> <p><i>Moderator: Cathy Livingston, Jones Day (formerly Attorney Advisor, Treasury, IRS Asst. Chief Counsel, and IRS Deputy Division Counsel/Associate Chief Counsel, TEGE)</i></p>
12:00 pm - 1:00 pm	<u>Lunch</u> (William H. Thumel Sr. Business Center Atrium)
1:00 pm - 2:00 pm	<p><u>4960 and Executive Compensation Issues for Exempt Organizations</u></p> <p><i>Speakers: Tom Hyatt, Dentons Sharon Lincoln, Casner & Edwards</i></p> <p><i>Moderator: Jeff Frank, Deloitte</i></p>
2:00 pm - 2:15 pm	<u>Break to Move to Breakout Sessions</u>
	<u>BREAKOUT SESSIONS</u>
2:15 pm - 3:15 pm	<p><u>Breakout: Healthcare Update</u> (William H. Thumel Sr. Business Center Auditorium)</p> <p><i>Speakers: Preston Quesenberry, KPMG (formerly Office of Associate Chief Counsel, IRS) Stephen Clarke, Ernst & Young LLP (formerly Project Manager, Guidance Group Manager, IRS TEGE)</i></p>
2:15 pm - 3:15 pm	<p><u>Breakout: Donor Advised Funds</u> (William H. Thumel Sr. Business Center, Room 225)</p> <p><i>Speakers: Ruth Madrigal, Steptoe (formerly Attorney Advisor, Treasury) J. Bradley Britton, The Columbus Foundation Roger Colinvaux, Professor, Catholic University of America, Columbus School of Law</i></p> <p><i>Moderator: Jennifer Becker Harris, Clark Nuber</i></p>

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regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: 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:** 510 minutes
- Recommended CPE:** 10.2 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 practitioners 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:** 8.5 credit hours
- Continuing Legal Education Program Level:** Intermediate

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