

TEGE | EXEMPT ORGANIZATIONS COUNCIL

2020 ANNUAL EXEMPT ORGANIZATIONS MEETING & UPDATE



D.C. Bar
Washington, D.C.
February 20-21, 2020

Register for the Annual Meeting and other upcoming programs at: www.eocouncil.org

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



ANNUAL MEETING AGENDA – February 20-21, 2020

D.C. Bar, 901 4th Street NW, Washington, D.C. 20001

Thursday, February 20, 2020

10:30 pm - 12:00 pm	<u>TEGE EO Council Board of Directors Meeting</u> (Board of Directors and Chairs only)
12:15 pm - 12:30 pm	<u>Program Attendee Check-In</u>
12:30 pm - 12:40 pm	<u>Welcome and Introductions</u>
12:40 pm - 1:40 pm	<u>State Regulation of Charitable Organizations</u> <i>Speakers: Mary T. Henderson, Senior Attorney, Financial Litigation and Charitable Trusts Division, TX Office of the Attorney General Kathleen Smith, Assistant Secretary of State, Maryland</i> <i>Moderator: Greg Lam, Copilevitz, Lam & Raney, LLC</i>
1:40 pm - 1:55 pm	<u>Break</u>
1:55 pm - 3:25 pm	<u>EO Hot Topics Roundtable</u> <i>Speakers: Eve R. Borenstein, Harmon Curran Philip Hackney, University of Pittsburgh School of Law Maya T. Miller, ProPublica Local Reporting Network</i> <i>Moderator: Richard Locastro, GRF CPAs & Advisors</i>
3:30 pm - 4:30 pm	<u>Election Year Issues</u> <i>Speakers: Yael Fuchs, Co-Chief, Charities Enforcement, NY Office of the Attorney General Bryson B. Morgan, Caplin & Drysdale Chartered Andrew Schulz, Arabella Advisors Douglas N. Varley, Caplin & Drysdale Chartered</i>
6:00 pm - 9:00 pm	<u>EO Reception and Dinner</u> National Guard Association, 1 Massachusetts Avenue, NW, Washington, DC 20001

Friday, February 21, 2020

7:00 am - 7:45 am	<u>Check-In & Continental Breakfast</u>
7:45 am - 8:00 am	<u>Welcome and Introductions</u>
8:00 am - 9:00 am	<u>Remarks from the Director of Exempt Organizations</u> <i>Speaker: Margaret Von Lienen, Director, Exempt Organizations, IRS</i> <i>Moderator: Cynthia M. Lewin, Venable LLP</i>
9:00 am - 9:10 am	<u>Break</u>

Friday, February 21, 2020, Continued

9:10 am - 10:10 am	<p><u>IRS Guidance Update</u></p> <p><i>Speakers: Matthew L. Giuliano, Branch Chief, Associate Chief Counsel's Office (EEE), IRS Stephanie N. Robbins, Associate Chief Counsel's Office (EEE), IRS Department of Treasury, Office of Tax Policy, Treasury (Invited)</i></p> <p><i>Moderator: Catherine E. Livingston, Jones Day</i></p>
10:15 am - 11:15 am	<p><u>Capitol Hill Update</u></p> <p><i>Speakers: Senate Finance Committee, Majority Staff (Invited) Gordon Clay, Joint Committee on Taxation Andrew Grossman, House Committee on Ways and Means, Majority Staff</i></p> <p><i>Moderator: Alexander Reid, Morgan Lewis & Bockius LLP</i></p>
11:15 am – 11:25 am	<p><u>Break</u></p>
11:25 pm - 12:25 pm	<p><u>IRS Examinations Update</u></p> <p><i>Speakers: Timothy Berger, Senior Technical Advisor to Director, Exempt Organizations, IRS Maria Hooke, Director of Examinations, Exempt Organizations, IRS</i></p> <p><i>Moderator: Stephen M. Clarke, Ernst & Young LLP</i></p>
12:25 pm - 1:10 pm	<p><u>Lunch</u></p>
1:15 pm - 2:15 pm	<p><u>Update on Implementation of the Tax Cuts & Jobs Act</u></p> <p><i>Speakers: Ruth Madrigal, KPMG LLP Elinor Ramey, former Attorney Advisor at the Office of Tax Policy, Treasury Jane Searing, Deloitte Tax LLP</i></p>
2:15 pm – 2:35 pm	<p><u>Break to Set Up Break Out Sessions</u></p>
2:35 pm - 3:35 pm	<p><u>Breakout Session A: Tax and Non-Tax Considerations for Foreign Activities</u></p> <p><i>Speakers: Jennifer Becker Harris, Clark Nuber PS Lara Kalwinski, Relief International Matthew T. Sanderson, Caplin & Drysdale Chartered</i></p> <p><i>Moderator: Maura L. Whelan, Simpson Thacher & Bartlett LLP</i></p>
2:35 pm - 3:35 pm	<p><u>Breakout Session B: Current Issues with Donor Advised Funds</u></p> <p><i>Speakers: Philip T. Hackney, University of Pittsburgh School of Law Amber Mackenzie, Associate Chief Counsel's Office (EEE), IRS Tracy Paglia, Moss Adams Emily Stern, Co-Chief, Charities Enforcement, NY Office of the Attorney General</i></p> <p><i>Moderator: Megan E. Bell, Patterson Belknap Webb & Tyler LLP</i></p>

- Title Name:** Exempt Organization Annual Meeting & Update
- Date & Time:** February 20, 2020 12:40 pm - 4:30 pm EDT
February 21, 2020 8:00 am - 3:35 pm EDT
- Time:** 570 minutes for Group Live
210 minutes for Group Internet Based (only Thursday sessions are available via webinar)
- Recommended CPE:** 11.4 credit hours (Group Live)
4.2 credit hours (Group Internet Based)
- Delivery Method:** Group Live - Limit 220 registrants
D.C. Bar
901 4th Street NW
Washington, D.C. 20001

Group Internet Based (Webinar)
- Total Price:** \$235 before January 31; \$285 after January 31
- Registration Method:** <http://www.eocouncil.org/events>
- 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.
- Recommended Continuing Legal Education:** 9.5 credit hours
- Continuing Legal Education Program Level:** Intermediate
- Continued Education:** Please look for an evaluation email from D.C. Bar to follow the program, which is required to be submitted within 48 hours in order to receive credit, regardless of your mode of attendance. If you attend any portion of the webinar program, please ensure that you record the eleven attendance codes shared throughout the program. You will be required to verify those in order to receive credit.
- No Printed Materials:** No printed materials will be available. Please print in advance. Materials can be downloaded at: www.eocouncil.org/materials. They will be available the week of the program and may be updated through the program date. If you have technical issues accessing, please contact admin@eocouncil.org.
- Location:** The DC Program will take place at DC Bar, 901 4th Street, NW, Washington, DC 20001. The program will be held on the second floor in the Potomac and Anacostia Rooms.

- Arrival:** Please check in with security in the lobby of the DC Bar Building when you arrive. After checking in, you will be directed to the 2nd floor.
- Metro:** The closest metro is Judiciary Square on the Red Line.
- Parking:** Parking is not available in the DC Bar building. Please see the following link for a list of other nearby garages or lots: <https://www.dcbar.org/about-the-bar/news/nearby-parking.cfm> Metered street parking is also available.
- Coats/Luggage:** Limited coat/storage space is available in the Potomac and Anacostia classrooms on the 2nd floor. Neither DC Bar nor the Council can ensure security or accept liability for any lost or stolen items.
- WiFi:** The network is “dcbarwifi” and password 2027374700.
- Reception and Dinner:** If you are registered for and attending the Reception and Dinner on Thursday night, the time is on the agenda. Both the reception and dinner are at National Guard Association, 1 Massachusetts Avenue, NW, Washington, DC 20001. If you would like to attend and are not registered, please email Jeff Schragg at jschragg@newtongrangellc.com.

Questions? Please contact the following with questions:

- Registration and Miscellaneous Questions – admin@eocouncil.org
- Payment - Jeff Schragg (jschragg@newtongrangellc.com)
- CPE Credit (CPAs) - Welansa Mekonnen (wmekonnen@gwscpa.org)
- CLE Credit - Theresa Inniss (tinniss@dcbar.org)

Payment/Refund Policies: Sorry, no refunds on registration; no registration without timely payment; and no onsite registration. Payment errors requiring reversal of charges will incur a \$15 cancellation fee.

If you have any questions regarding your registration, please contact admin@eocouncil.org. We look forward to seeing you!