

**Exempt Organizations Update – June 15, 2018**  
**TEGE Exempt Organizations Council**

Presented in cooperation with The Greater Washington Society of CPAs

*\* CLE approved in TX, and anticipated for portions of the program in IN, NY, MN, OH (Columbus location only), OR, UT, and VA;  
 NASBA certified CPE anticipated*

<p>7:30-8:00 CDT 8:30-9:00 EDT</p>	<p align="center"><b>Registration &amp; Continental Breakfast (Dallas)</b></p>
<p>8:00-8:05 CDT 9:00-9:05 EDT</p>	<p align="center"><b>Initial Comments/Announcements</b></p>
<p>8:05-8:55 CDT 9:05-9:55 EDT (recorded for MDT and PDT viewing)</p>	<p align="center"><b>UBTI Tax Reform Panel (Live in DC)</b>           Meghan Biss, Caplin &amp; Drysdale (DC)          Jonathan Carter, Office of the Associate Chief Counsel, IRS (DC)</p>
<p>7:00-7:55 PDT 8:00-8:55 MDT 9:00-9:55 CDT 10:00-10:55 EDT</p>	<p align="center"><b>UBTI: A Practical Discussion – Where the Rubber Hits the Road ... (Live in Dallas)</b>           Kyle R. ZumBerge, The University of Texas System Office of General Counsel          Ray Bunyard, CPA, Vice President, Tax Services, Baylor Scott &amp; White          Mark Conner, CPA, MBA, Tax Manager, Finance, American Heart Association           Moderator: Kathy H. Pitts, EY</p>
<p>7:55-8:05 PDT 8:55-9:05 MDT 9:55-10:05 CDT 10:55-11:05 EDT</p>	<p align="center"><b>Break</b></p>
<p>8:05-9:00 PDT 9:05 MDT-10:00 MDT 10:05-11:00 CDT 11:05-12:00 EDT</p>	<p align="center"><b>EO Technical Update from TEGE Associate Chief Counsel Office (Live in DC)</b>           Amy Giuliano, Office of the Associate Chief Counsel, IRS          Amber Mackenzie, Office of the Associate Chief Counsel, IRS</p>
<p>9:05-10:00 PDT 10:05-11:00 MDT 11:05-12:00 CDT 12:05-1:00 EDT</p>	<p align="center"><b>Update and Q&amp;A with the Director of Exempt Organizations (by Video)</b>           Margaret Von Lienen, Director, Exempt Organizations, IRS           Moderator: Lori Boyce, Deloitte (by Phone)</p>
<p>10:00-10:30 PDT 11:00-11:30 MDT 12:00-12:30 CDT 1:00-1:30 EDT</p>	<p align="center"><b>Lunch Break</b></p>

<p>10:30-11:00 PDT 11:30-12:00 MDT 12:30-1:00 CDT 1:30-2:00 EDT</p>	<p><b>Lunch Program: Case Study of Collaboration: After8toEducate (live in Dallas)</b></p> <p>Hillary Evans, Executive Director, After8toEducate</p> <p>Moderator: Jonathan Blum, Polsinelli PC</p>
<p>11:05-12:00 PDT 12:05-1:00 MDT 1:05-2:00 CDT 2:05-3:00 EDT</p>	<p><b>Employee Sharing: The Lay of the Land, and Where You Can Go Wrong (Live in Dallas)</b></p> <p>Timothy G. Verrall, Ogletree, Deakins, Nash, Smoak &amp; Stewart, P.C. William Fournier, Caplin &amp; Drysdale (by Phone) Michael K. Mahoney, Ogletree, Deakins, Nash, Smoak &amp; Stewart, P.C.</p>
<p>12:05-1:00 PDT 1:05-2:00 MDT 2:05-3:00 CDT 3:05-4:00 EDT</p>	<p><b>Capitol Hill Update: What Are Members and Staffers Focusing On? (Live in DC)</b></p> <p>Gordon Clay, Legislation Counsel, Joint Committee on Taxation Veena K. Murthy, Legislation Counsel, Joint Committee on Taxation Victoria Glover, Ways and Means Committee Republican Staff, <i>Invited</i></p> <p>Moderator: Alexander L. Reid, Morgan, Lewis &amp; Bockius</p>
<p>1:05-2:00 PDT 2:05-3:00 MDT (recorded earlier for MDT and PDT viewing)</p>	<p><b>UBTI Tax Reform Panel (Recorded – See Above)</b></p>

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**\*\*Please see the following page for CPE Details\*\***

**Title Name:** Exempt Organization Update

**Date & Time:** June 15, 2018 - 7:00-2:00 PDT / 8:00 – 3:00 MDT / 7:30-3:00 CDT / 8:30-4:00 EDT

**Time:** 355 minutes

**Recommended CPE:** 7.0 credit hours.

**Total Price:** Dallas, \$75; other locations \$30.

**Registration Method:** <http://www.tegegulfcoast.org/events.html>

**Field of Study:** Taxes.

**Learning Objectives:** Exempt Organizations Update and Tax/Technical Question and Answer Session, UBTI issues related to the Tax Cuts and Jobs Act, as well as practical UBTI issues from in-house panelists, tax and legal issues involved with sharing employees among affiliated organizations, and update on tax reform from Capitol Hill staffers.

**Speakers:** See above agenda.

**Advanced Preparation:** If desired, participants can submit questions prior to the event no later than June 1, 2018 to Danika Mendrygal (danika@mendrygallaw.com).

**Prerequisites:** None.

**Program Content:** This year's program will bring together current and former IRS 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:** Update.

**Delivery Method:** Group Live.

<b>Location</b>	<b>Address</b>
Bellevue, WA	Clark Nuber 10900 NE 4th Street, Suite 1400 Bellevue, WA 98004
Boston, MA	Casner & Edwards, LLP 303 Congress St. Boston, MA 02210
Chicago, IL	Ernst & Young LLP 155 North Wacker Drive Chicago, Illinois 60606
Cincinnati, OH	Ernst & Young 1900 Scripps Center 312 Walnut St. Cincinnati, Ohio 45202
Columbus, OH	Brickler & Eckler LLP 100 S 3rd Street Columbus, OH 43215
Dallas, TX	UNT College of Law 1901 Main St. Dallas, TX 75201

Denver, CO	Eide Bailly LLP 7001 E. Belleview Ave., Ste. 700 Denver, CO 80237-2733
Detroit, MI	Bodman LLP 1901 Saint Antoine St. 6th Floor at Ford Field Detroit, MI 48226
Grand Rapids, MI	BDO 200 Ottawa Ave. Suite 300 Grand Rapids, MI 49503
Indianapolis, IN	Hall, Render, Killian, Heath & Lyman, P.C. 500 N Meridian St Ste 400 Indianapolis, IN 46204
Minneapolis, MN	Nilhan Johnson Lewis, PA Canadian Pacific Plaza 120 South Sixth Street, Suite 400 Minneapolis, MN 55402
New York, NY	Patterson Belknap Webb & Tyler LLP 1133 Avenue of the Americas New York, New York 10036
Omaha, NE	KPMG 1212 N. 96 <sup>th</sup> Street, Suite 300 Omaha, Nebraska 68114
Phoenix, AZ	Eide Bailly LLP 1850 North Central Avenue, Ste. 400 Phoenix, Arizona 85004
Portland, OR	Portland Legal Office Oregon Department of Justice 100 SW Market Street Portland, OR 97201
San Diego, CA	For Purpose Law Group 1435 30th Street San Diego, CA 92102
Salt Lake City, UT	Kirton McConkie Building 50 East South Temple Suite 400 Salt Lake City, UT 84111
Washington, DC	Caplin & Drysdale 1 Thomas Cir NW Ste 1100 Washington, DC 20005