

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)
1:00 pm - 2:20 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 - 4:00 pm	<u>EO Hot Topics Roundtable</u> <i>Speakers: Cass Brewer, Georgia State University Megan Biss, Caplin & Drysdale (formerly Sr. Technical Adviser to Director of EO) IRS Tax Reform Implementation Office or "TRIO" Representative (Invited)</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

7:15 am - 8:00 am	<u>Check-In & Continental Breakfast</u> (William H. Thumel Sr. Business Center Atrium)
8:00 am - 8:15 am	<u>Welcome and Introductions</u>

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8:15 am - 9:15 am	<p><u>Remarks from the Director of Exempt Organizations</u></p> <p><i>Speaker: Margaret Von Lienen, Director, Exempt Organizations, IRS</i> <i>Moderator: Eve Borenstein, BAM Law Office</i></p>
9:15 am – 9:30 am	<p><u>Break</u></p>
9:30 am - 10:30 am	<p><u>EO Update from Treasury and Associate Chief Counsel Office</u></p> <p><i>Speakers: Janine Cook, Deputy Associate Chief Counsel (TEGE)(EOEG), IRS</i> <i>Elinor Ramey, Attorney Advisor, Office of Tax Policy, U.S. Dept. of Treasury</i> <i>Moderator: Robert Wexler, Adler & Colvin</i></p>
10:30 am - 10:40 am	<p><u>Break</u></p>
10:40 am - 11:55 pm	<p><u>IRS Examinations Update</u></p> <p><i>Speakers: Maria Hooke, Director, EO Examinations, IRS</i> <i>Sean O'Reilly, IRS TE/GE (Invited)</i> <i>Mike Engle, BKD</i> <i>Moderator: Cathy Livingston, Jones Day (Invited)</i></p>
12:00 pm - 1:00 pm	<p><u>Lunch</u> (William H. Thumel Sr. Business Center Atrium)</p>
1:00 pm - 2:00 pm	<p><u>Executive Compensation</u></p> <p><i>Speakers: Andrew Holubeck, Office of Associate Chief Counsel (TEGE) (Invited)</i> <i>Chelsea Rubin, Office of Associate Chief Counsel (TEGE) (Invited)</i> <i>John Richards, Office of Associate Chief Counsel (TEGE) (Invited)</i> <i>Tom Hyatt, Dentons</i> <i>Sharon Lincoln, Casner & Edwards,</i> <i>Moderator: Jeff Frank, Deloitte</i></p>
<u>BREAKOUT SESSIONS</u>	
2:10 pm - 3:15 pm	<p><u>Breakout: Healthcare Update</u> (William H. Thumel Sr. Business Center Auditorium)</p> <p><i>Speakers: Geoff Campbell, Tax Law Specialist, IRS TE/GE, Exempt Organizations (Invited)</i> <i>Preston Quesenberry, KPMG (formerly Office of Associate Chief Counsel, IRS)</i> <i>Moderator: Steve Clarke, EY</i></p>
2:10 pm - 3:15 pm	<p><u>Breakout: Donor Advised Funds</u> (William H. Thumel Sr. Business Center, Room 225)</p> <p><i>Speakers: Amber MacKenzie, Office of Associate Chief Counsel (TEGE), IRS</i> <i>Ruth Madrigal, Steptoe (formerly Attorney Advisor, Treasury)</i> <i>J. Bradley Britton, The Columbus Foundation</i> <i>Moderator: Jennifer Harris, Clark Nuber</i></p>

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