

EFFECTIVE JANUARY 24, 2022

The Entire Keightley & Ashner Team Has Joined  
**THE WAGNER LAW GROUP**

[Click to visit our website](#)

You can view this PDF by advancing to the next page.

**2020 JOINT TE/GE COUNCIL EMPLOYEE PLANS  
& EXEMPT ORGANIZATIONS ANNUAL  
MEETING**

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

**Register at: [2020 Registration](#)  
The National Press Club  
529 14th Street, NW, 13th Floor  
Washington, D.C. 20045  
February 27-28, 2020**



**GREAT LAKES AREA TE/GE COUNCIL - GULF COAST AREA TE/GE COUNCIL  
PACIFIC COAST AREA TE/GE COUNCIL - NORTHEAST PENSION LIAISON GROUP  
MID-ATLANTIC PENSION LIAISON GROUP**

**EMPLOYEE PLANS (EP) AGENDA**  
**February 27-28, 2020**

**Thursday, February 27, 2020**

<b>7:15am-8:00am</b>	<b>Registration and Continental Breakfast</b>
<b>8:00am-9:00am</b>	<b>Remarks by:</b> <b>DOL Assistant Secretary Preston Rutledge (invited)</b> <b>DOL Principal Deputy Assistant Secretary Jeanne Klinefelter Wilson (invited)</b>
<b>9:00am-10:00am</b>	<b><u>What's New in EBSA Regulations and Reporting</u></b>  <i>Panelists (invited):</i> <i>Scott Albert, Chief of the Division of Reporting Compliance, Office of Chief Accountant, Employee Benefits Security Administration, DOL;</i> <i>Joe Canary, Director, Office of Regulations and Interpretations</i> <i>Lyssa Hall, Director, Office of Exemption Determinations</i>  <i>Moderator: Avery E. Neumark, CPA, JD, LL.M., Marks Paneth LLP, NYC, NY (member Northeast Pension Liaison Group)</i>
<b>10:00am-10:15am</b>	<b><u>BREAK</u></b>
<b>10:15am-11:15am</b>	<b><u>EBSA Practitioners Panel</u></b>  <i>Representatives of each regional TE/GE Council discuss an EBSA issue of current interest in their region</i>  <i>Panelists:</i> <i>Kimberley Flett, CPA, QPA, QKA, CHRS, BDO USA, LLP, Akron, OH (member Mid-Atlantic Pension Liaison Group)</i> <i>Ruel Pile, JD, LL.M., Boutwell Fay LLP, Newport Beach, CA (member Pacific Coast Area TE/GE Group)</i>  <i>Moderator: Karen Field, RSM US, LLP, Washington, DC (member Mid-Atlantic Pension Liaison Group)</i>
<b>11:15am-12:00pm</b>	<b><u>More News from The DOL</u></b> <i>Speakers (invited):</i> <i>Timothy Hauser, DOL Deputy Assistant Secretary for National Office Operations</i> <i>Amy Turner, DOL Deputy Assistant Secretary for Regional Office Operations</i>  <i>Moderator: Lisa Van Fleet, Bryan Cave Leighton Paisner LLP, St. Louis, MO (member Gulf Coast TE/GE Council)</i>
<b>12:00pm-12:45pm</b>	<b><u>LUNCH</u></b> <i>Separate Meetings for Northeast Pension Liaison Group, Gulf Coast Area TE/GE Council, Mid-Atlantic Pension Liaison Group, Great Lakes Area TE/GE Council, and Pacific Coast Area TE/GE Council</i>

12:45pm-1:45pm	<p><b><u>The SECURE Act and other news from Capitol Hill</u></b></p> <p><i>Panelist:</i> Kendra Kosko Isaacson, Senior Pensions Counsel, HELP Committee, U.S. Senate;</p> <p><i>Moderator:</i> Bruce J. McNeil, Partner, Stoel Rives, LLP, Seattle, WA (member Great Lakes Area TE/GE Council)</p> <p><i>The panel with Kendra and Bruce may be joined by other attorneys from Capitol Hill as their legislative schedules permit.</i></p>
1:45pm-2:45pm	<p><b><u>News from the PBGC</u></b></p> <p><i>Panelists (invited):</i> John Menke, Assistant General Counsel, Office of General Counsel, PBGC Stephanie Cibinic, Deputy Assistant General Counsel for Regulatory Affairs, Office of General Counsel, PBGC Bela Palli, Program Manager, Standard Termination Compliance Division, PBGC</p> <p><i>Moderator: Harold J. Ashner, Partner, Keightley &amp; Ashner LLP, Washington, D.C. (member Mid-Atlantic Pension Liaison Group)</i></p>
2:45pm-3:00pm	<p><b><u>BREAK</u></b></p>
3:00pm-4:00pm	<p><b><u>Regulatory Update on Health and Welfare Plans (discussion of new HRA rules - - ICHRA, EBHRA)</u></b></p> <p><i>Panelists:</i> Kevin Knopf, Senior Technician Reviewer, Office of Chief Counsel, IRS Christopher J. Dellana, Esq., Employee Benefits, Exempt Organizations, and Employment Taxes, Office of Chief Counsel, IRS Amber Rivers, Acting Director, Office of Health Plan Standards and Compliance Assistance, EBSA (invited)</p> <p><i>Moderator: Deborah Walker, CPA, Cherry Bekaert, Tysons, VA (member Mid-Atlantic Pension Liaison Group)</i></p>
4:00pm-5:00pm	<p><b><u>MEPs and PEPS - - Where do we go from here</u></b></p> <p><i>Panelists (invited):</i> Pamela R. Kinard, Esq., Special Counsel, Employee Benefits, Exempt Organizations, and Employment Taxes, Office of Chief Counsel, IRS Jamie L. Dvoretzky, Esq., Attorney Adviser, Employee Benefits, Exempt Organizations, and Employment Taxes, Office of Chief Counsel, IRS Colleen Brisport, Office of Regulations and Interpretations, EBSA</p> <p><i>Moderator: Robert J. Toth, Jr., Esq., Law Offices of Robert J. Toth, Jr. LLC, Fort Wayne, IN (member Great Lakes Area TE/GE Council)</i></p>
5:00pm-6:30pm	<p><b><u>Employee Plans Reception - - First Amendment Room</u></b></p>

**Friday, February 28, 2020**

<b>7:15am-8:00am</b>	<b><u>Registration and Continental Breakfast</u></b>
<b>8:00am-9:00am</b>	<b><u>Remarks by the Commissioner</u></b>  <i>Speaker: Tammy Ripperda, Commissioner, Tax Exempt and Government Entities Division, IRS</i>
<b>9:00am-10:00am</b>	<b><u>News from Employee Plans</u></b>  <i>Speakers: Cathy Jones, Acting Director, Employee Plans, IRS Louis J. Leslie, Senior Technical Advisor, Employee Plans, IRS</i>  <i>Moderator: Kristy Buckley, JD, LL.M., Crowley Fleck PLLP, Bozeman, MT (member Pacific Coast Area TE/GE Group)</i>
<b>10:00am-10:15am</b>	<b><u>BREAK</u></b>
<b>10:15am-11:15pm</b>	<b><u>IRS Practitioner Panel</u></b>  <i>Representatives of each regional TE/GE Council discuss an issue of current interest in their region.</i>  <i>Panelists: Martin P. Tierney, Esq., Michael Best &amp; Friedrich LLP, Milwaukee, WI (member Great Lakes TE/GE Council) A. Paul Protos, President, ATR, Inc., King of Prussia, PA (member Mid-Atlantic Pension Liaison Group) T. Katuri Kaye, Esq., Trucker Huss, Los Angeles, CA (member Pacific Coast Area TE/GE Council)</i>  <i>Moderator: TBD</i>
<b>11:15am-12:00pm</b>	<b><u>News from EP Examinations and EP Rulings and Agreements</u></b>  <i>Speakers: Bill Dolce, Acting Director, EP Exam Khin Chow, Director EP Rulings/Agreements</i>  <i>Moderator: Matthew Whitehorn, Esq., Dilworth Paxson LLP, Philadelphia, PA (member Mid-Atlantic Pension Liaison Group)</i>
<b>12:15pm-1:15pm</b>	<b><u>LUNCH- Joint Council Board of Directors Meeting</u></b>

<p><b>1:15pm-2:15pm</b></p>	<p><b><u>Executive Compensation and other Benefits- Related Guidance</u></b></p> <p><i>Panelists:</i>  <i>Stephen Tackney, Deputy Associate Chief Counsel (Employee Benefits), TEGE, Office of Chief Counsel, IRS;</i>  <i>Ilya Enkishev, Attorney (Employee Benefits), TEGE, Office of Chief Counsel, IRS</i></p> <p><i>Moderator: Heidi Lyon, Warner, Norcross &amp; Judd, Grand Rapids, MI (member of the Great Lakes Area TE/GE Council)</i></p>
<p><b>2:15-2:30pm</b></p>	<p><b><u>Conference is Adjourned</u></b></p>

\*Please note that this agenda is subject to change.