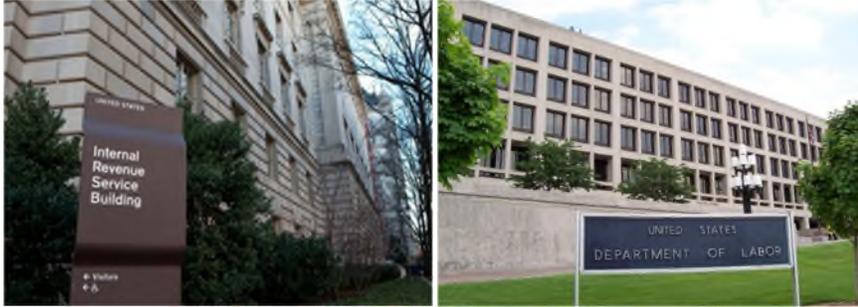


2026 Joint TE/GE Council Employee Plans Annual Meeting



Making a difference with conversations since 1991

**Venue: Seyfarth Shaw LLP
975 F Street, NW
Washington, DC 20004
& Virtual Option**

Wednesday February 25, 2:00pm
to
Friday February 27, 2:00pm

[Registration Link](#)

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

Please join our Board to thank all our speakers, especially from the Internal Revenue Service, the Department of Labor, and other governmental agencies who voluntarily dedicate valuable time and outreach throughout the year, including by attending and participating in our Annual Meeting.

Joint TE/GE Council Employee Plans Annual Meeting

Wednesday February 25, 2026

2:00 PM – 2:15PM (EST)

Capitol Hill Room

Welcome Remarks

Lisa Germano, Actuarial Benefits & Design Company (Mid-Atlantic Pension Liaison Group)

Dominic DeMatties, Thompson Hine LLP (Mid-Atlantic Pension Liaison Group)

2:15PM – 3:15 PM (EST)

Capitol Hill Room

Reflections on Retirement Reform

Discussion regarding current efforts by employee benefit attorneys to work toward reform efforts for retirement coverage, participant engagement and retirement income literacy.

- Matt Whitehorn, Dilworth Paxson LLP (Mid-Atlantic Pension Liaison Group)
- Cynthia A. Van Bogaert, Retirement Reform Group (Pacific Coast Area TE/GE Council)

Moderator: Lisa Germano, Actuarial Benefits & Design Company (Mid-Atlantic Pension Liaison Group)

3:15PM – 4:15 PM (EST)

Capitol Hill Room

Health and Welfare General Updates

Updates on direct primary care service arrangements, health savings accounts, fertility benefits, and mental health parity.

- Kevin Knopf, IRS, Office of Associate Chief Counsel, EEE
- Jason Lacey, IMA Financial Group, Inc. and Lacey, P.A. (Gulf Coast Area TE/GE Council)

Moderator: Kristy Buckley, BMDD Law (Pacific Coast Area TE/GE Council)

4:15PM – 5:15 PM (EST)

Capitol Hill Room

Executive Compensation

Discussion regarding timely executive compensation issues.

- Kurt Lawson, Deputy Benefits Tax Counsel, Department of the Treasury (invited)
- Richard Nettles, Former IRS, Office of Associate Chief Counsel, EEE (currently Latham & Watkins LLP)
- Sasha Belinkie, White & Case LLP (Northeast Pension Liaison Group)

Moderator: Eric Winwood, Sidley Austin LLP (Gulf Coast Area TE/GE Council)

Thursday February 26, 2026

9:00AM – 9:05AM (EST)

Capitol Hill Room

Welcome Remarks

Dominic DeMatties, Thompson Hine LLP (Mid-Atlantic Pension Liaison Group)

9:05AM – 9:50AM (EST)

Capitol Hill Room

EBSA Updates & Priorities

An overview of current EBSA priorities.

- Ali Khawar, Former Principal Deputy Assistant Secretary, US Dept of Labor, EBSA
- Tim Hauser, Former Deputy Assistant Secretary for Program Operations, US Dept of Labor, EBSA

Moderator: Jessica Kuester, Isler Dare PC (Mid-Atlantic Pension Liaison Group)

Joint TE/GE Council Employee Plans Annual Meeting

Thursday February 26, 2026

9:50AM – 10:50AM (EST)

Capitol Hill Room

Practitioner's Panel

Current, practical issues and suggested solutions to inform EBSA and provide feedback.

- Allison Wilkerson, McDermott Will & Schulte (Gulf Coast Area TE/GE Council)
- Mary Giganti, Waldheger Coyne LPA (Great Lakes Area TE/GE Council)
- Katuri Kaye, Trucker Huss (Pacific Coast Area TE/GE Council)

Moderator: Maria Hurd, Belfint Lyons & Shuman, P.A. (Mid-Atlantic Pension Liaison Group)

10:50 AM – 11:00AM (EST)

Break

11:00 AM – 12:00PM (EST)

Capitol Hill Room

Cybersecurity

An overview of EBSA cybersecurity investigations, EBSA's new guidance involving healthcare plans, the rise in cybersecurity breaches and incidents particularly targeting the health industry and health plans, and what EBSA expects fiduciaries and plan sponsors to be doing regarding cybersecurity.

- Lisa Gomez, LMG Collaborative Consulting Solutions (Northeast Pension Liaison Group)
- Trish McGinity, CISSP, CCSK, Head of Cybersecurity Communications, Empower
- Kyle Jekot, CISSP, CFE, GCIH, Sr. Cybersecurity Communications Director, Empower

Moderator: Ann Caresani, Baker & Hostetler LLP (Great Lakes Area TE/GE Council)

12:00PM – 1:10PM (EST)

Lunch

Area Council Meetings

1:10PM – 1:30PM (EST)

Capitol Hill Room

Lifetime Income Products

Discussion of current thinking and open questions pertaining to lifetime income products in defined contribution plans.

- Bob Toth, Fiduciary Law Center (Great Lakes Area TE/GE Council)
- Evan Giller, Boutwell Fay LLP (Northeast Pension Liaison Group)

Moderator: Dominic DeMatties, Thompson Hine LLP (Mid-Atlantic Pension Liaison Group)

1:30PM – 2:30PM (EST)

Capitol Hill Room

Health Plans, Healthcare, and AI

Discussion of the changing landscape of healthcare providers using AI for purposes of billing and documenting medical records juxtaposed by the changing landscape of health plans using AI for purposes of reviewing claims and appeals.

- Amy Turner, Deputy Director, Innovation Center, Centers for Medicare & Medicaid Services
- Ryan Temme, Groom Law Group, Chartered

Moderator: Adrienne Maxwell, BMDD Law (Pacific Coast Area TE/GE Council)

Joint TE/GE Council Employee Plans Annual Meeting

Thursday February 26, 2026

2:30PM – 3:30PM (EST)

Capitol Hill Room

Alternative Assets

Focused analysis of DOL regulatory initiatives and priorities related to alternative assets.

- Ali Khawar, Former Principal Deputy Assistant Secretary, US Dept of Labor, EBSA
- David Kaleda, Eversheds Sutherland

Moderator: Jeff Bauer, BLG PLLC (Great Lakes Area TE/GE Council)

3:30PM – 3:50PM (EST)

Capitol Hill Room

Update from the Office of the Chief Accountant

An overview of EBSA Chief Accountant activity.

- Marcus Aron, Chief Accountant (Acting), Office of the Chief Accountant, US Dept of Labor, EBSA

Moderator: Norma Sharara, JD, Managing Director, National Tax, BDO (Mid-Atlantic Pension Liaison Group)

3:50PM – 4:00PM (EST)

Break

4:00PM – 5:00PM (EST)

Capitol Hill Room

Pharmacy Benefit Reporting and Disclosure

This panel will cover the proposed rulemaking regarding PBM fee and compensation disclosures and the Consolidated Appropriations Act, 2026, changes regarding ERISA Section 726 and 408(b)(2).

- Amber Rivers, Groom Law Group, Chartered
- Shira McKinlay, Thompson Hine LLP

Moderator: Mary Powell, Trucker Huss (Pacific Coast Area TE/GE Council)

5:00PM – 5:30PM (EST)

Capitol Hill Room

Update from The Hill

Updates regarding legislative activity to watch in 2026.

- Kendra Kosko Isaacson, Principal, Mindset (former Pensions Policy Director and Senior Tax Counsel for the Senate President Pro Tempore Patty Murray and the Senate Committee on Health, Education, Labor, and Pensions)
- Rhonda Migdail, Joint Committee on Taxation
- Clare Diefenbach, Joint Committee on Taxation

Moderator: Gary Blachman, Akerman LLP (Great Lakes Area TE/GE Council)

5:30PM – 7:00PM (EST)

Reception – 6th Floor

Friday February 27, 2026

9:00AM – 9:05AM (EST)

Capitol Hill Room

Welcome Remarks

Lisa Germano, Actuarial Benefits & Design Company (Mid-Atlantic Pension Liaison Group)

Joint TE/GE Council Employee Plans Annual Meeting

Friday February 27, 2026

9:05AM – 9:35 AM (EST)

Capitol Hill Room

IRS Opening Remarks

An overview of IRS activity.

- Edward Killen, IRS, TE/GE Commissioner

Moderator: Wayne Kamenitz, Segal (Northeast Pension Liaison Group)

9:35AM – 10:35AM (EST)

Capitol Hill Room

Employee Benefit Plan Review

A view from Chief Counsel and IRS regarding Employee Plans since the last Annual Meeting.

- Laura Warshawsky, IRS, Deputy Associate Chief Counsel, EEE
- John Hughes, IRS, Director, EP (Acting)
- Lou Leslie, IRS, EP Technical Advisor

Moderator: Eric Slack, Thompson Hine LLP (Mid-Atlantic Pension Liaison Group)

10:35AM – 10:45AM (EST)

Break

10:45AM – 11:45PM (EST)

Capitol Hill Room

EP Examinations; EPCRS Update; Opinion Letters

Discussion and practical developments impacting EP examinations, EPCRS, including the Voluntary Corrections Program and the impact of changes made by SECURE 2.0, and Determination/Opinion Letters.

- Lou Leslie, IRS, EP Technical Advisor
- John Hughes, IRS, Director, EP (Acting)

Moderator: Rachel Leiser Levy, Deloitte Tax LLP (Mid-Atlantic Pension Liaison Group)

11:45PM – 12:15PM (EST)

Lunch (Sandwich Buffet)

12:15PM – 1:15PM (EST)

Capitol Hill Room

Practitioner's Panel

Current, practical issues and suggested solutions to inform the IRS and provide feedback.

- Brandon Long, McAfee & Taft (Gulf Coast Area TE/GE Council)
- Sarah J. Touzalin, Seyfarth Shaw (Great Lakes Area TE/GE Council)
- Katie Kohn, Thompson Hine LLP (Mid-Atlantic Pension Liaison Group)

Moderator: Audrey Fenske, Stinson LLP (Great Lakes Area TE/GE Council)

1:15 PM – 2:15 PM (EST)

Capitol Hill Room

Guidance: Chief Counsel/Commissioner Reviews

Discussion of recent IRS guidance.

- Laura Warshawsky, IRS, Deputy Associate Chief Counsel, EEE
- Christina Cerasale, IRS, Office of Associate Chief Counsel, EEE
- Kara Soderstrom, IRS, Office of Associate Chief Counsel, EEE
- Lou Leslie, IRS, EP Technical Advisor

Moderator: Lori Oliphant, Steptoe & Johnson PLLC (Gulf Coast Area TE/GE Council)

Joint TE/GE Council Employee Plans Annual Meeting

Friday February 27, 2026

2:15 PM (EST)

Capitol Hill Room

Closing Remarks - Meeting Adjournment

Please complete the survey that will be delivered to your inbox!

Dominic DeMatties, Thompson Hine (Mid-Atlantic Pension Liaison Group)

Incorporated in 2012, the Joint TE/GE Council is a tax-exempt organization under section 501(c)(3) of the Internal Revenue Code. Its purpose is to facilitate communication between the TE/GE Division of the Internal Revenue Service and employee benefits practitioners. The Joint TE/GE Council provides a forum for comments or questions to enhance the administration of tax code compliance and overall employee benefits regulatory and enforcement initiatives.

In 1991, the Baltimore Key District of IRS initiated the first meeting and invited each IRS area to be represented on the planning committee. Today, the Joint TE/GE Council is a consortium formed by the Great Lakes Area TE/GE Council, Gulf Coast Area TE/GE Council, Mid-Atlantic Pension Liaison Group, Northeast Pension Liaison Group and Pacific Coast Area TE/GE Council (the "TE/GE Councils"). The common thread among the TE/GE Councils is membership of experienced employee plans practitioners (including practitioners from legal, accounting, and consulting firms, as well as executives and in-house counsel from both for-profit and tax-exempt organizations).

Meeting Materials and Speaker Biographies

Meeting materials can be accessed on the Joint TE/GE Council website: TEGECouncil.org. Here is a QR Code to our website:



The Joint TE/GE Board maintains the spirit of holding a meeting, not a conference. Therefore, speakers are encouraged to come to the Annual Meeting ready for a dialogue, rather than the preparation of slides or a formal lecture. Typically, meeting materials consist of an important news article or a brief white paper describing a topic of interest.

Continuing Education

The Joint TE/GE Council Annual Meeting does not coordinate with any state or licensing authority to certify continuing education credits. If you want to apply in your jurisdiction at your licensing authority office for continuing education credits, then you must do so on your own.

Hotel Rooms

There are no blocks of hotel rooms reserved.

Registration and Fees

Early Bird pricing for in-person attendees is available until February 2nd. Regular pricing for in-person attendees applies starting February 3rd. Late registration pricing applies 10 days before the meeting. Governmental attendees, law student, and accounting student attendance is complimentary with early registration and dependent upon space.

- \$375 for in-person attendees, registered before February 3, 2026
- \$475 for in-person attendees, registered on or after February 3, 2026

Joint TE/GE Council Employee Plans Annual Meeting

- \$475 for virtual attendees
- \$575 for all registrations after February 11, 2026
- \$300 for practitioners with less than 5 years' experience

There is no onsite registration for in-person attendees the day of the event.

All registration will close on Monday, February 23th at 5:00 p.m., EST.

Breakfast, Lunch, and Reception

Light, continental breakfast is offered both mornings between 8:00am - 9:00 am for the in-person attendees.

Boxed lunches will be provided on Friday.

If you are a speaker, student, governmental person, or person from the press instead of attending the lunch session you may pick up a box lunch on Thursday and use the Capitol Hill Room conference room.

All the in-person meeting spaces are on the 10th floor of the Seyfarth Shaw LLP law firm (975 F Street NW, Washington DC), with the exception of our Thursday evening reception. The Thursday reception will be held on the 6th floor.