



**2021 JOINT TE/GE COUNCIL
EMPLOYEE PLANS
ANNUAL MEETING**

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conversations since
1993**

Register: [Link](#)

February 25-26, 2021

**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 note that this agenda is subject to change.

EMPLOYEE PLANS (EP) AGENDA
February 25-26, 2021

Thursday, February 25, 2021

Welcome – Lisa Germano and Thomas Schendt

9:45 am– 10:00 am eastern

6:45 am pacific

7:45 am mountain

8:45 am central

IRS/DOL Opening Remarks

IRS Speakers:

Eric Slack Director, Employee Plans, TEGE

Stephen Tackney, Deputy Associate Chief Counsel, Employee Benefits, EEE, Office of Chief Counsel, IRS

DOL Speaker:

Timothy Hauser, DOL Deputy Assistant Secretary of National Office (invited)

Moderator: Thomas Schendt, Mid-Atlantic

10:00 am-10:45 am eastern

7:00 am pacific

8:00 am mountain

9:00 am central

News from The DOL

Speaker:

Timothy Hauser, DOL Deputy Assistant Secretary for National Office Operations (invited)

Moderator: Eric Winwood, Gulf Coast

10:45 am-11:30 am eastern

7:45 am pacific

8:45 am mountain

9:45 am central

EBSA Regulations; Investigations and Reporting

Panelists:

Mabel Capolongo Office Director, Office of Enforcement, DOL (invited)

Joe Canary, Director, Office of Regulations and Interpretations, DOL (invited)

Scott Albert, Chief of the Division of Reporting Compliance, Office of Chief Accountant, Employee Benefits Security Administration, DOL (invited)

Moderator: Felicia Finston, Gulf Coast

11:30 am-12:45 pm eastern

8:30 am pacific

9:30 am mountain

Please note that this agenda is subject to change.

10:30 am central

BREAK/Lunch/Mid-Atlantic Remarks

12:45 pm-1:15 pm eastern

9:45 am pacific

10:45 am mountain

11:45 am central

Missing Participants

Update on Governments Efforts

Panelists:

Michael Schloss, Regional Director, Philadelphia Regional Office,
Employee Benefits Security Administration, DOL

Lou Leslie Special Assistant to the Director of Employee Plans
Joe Canary, Director, Office of Regulations and Interpretations, DOL
(invited)

Keith Kost, Senior Technician Reviewer, Qualified Plans Branch 2, EEE,
Office of Chief Counsel, IRS

Stephen Tackney, Deputy Associate Chief Counsel, Employee Benefits,
EEE, Office of Chief Counsel, IRS

Moderator: Lisa Tavares, Mid-Atlantic

1:15 pm-2:15 pm eastern

10:15 am pacific

11:15 am mountain

12:15 am central

EBSA Practitioners Panel

Representatives of each regional TE/GE Council discuss an EBSA issue of current
interest in their region

Panelists:

Mid-Atlantic – Peter Gulia

Gulf Coast – Brandon Long

Great Lakes – Heidi Lyon

North-East – Douglas Tang

Pacific Coast - Susan Mehlman

Moderator: Lori Oliphant, Gulf Coast

2:15 pm-3:15 pm eastern

11:15 am pacific

12:15 pm mountain

1:15 pm central

BREAK

3:15 pm-3:30 pm eastern

12:15 pm pacific

1:15 pm mountain

2:15 pm central

Please note that this agenda is subject to change.

News from Capitol Hill – Breakout One

Panelists (invited):

Rhonda Migdail, Legislative Counsel, Joint Committee on Taxation
Clare Diefenbach, Legislative Counsel, Joint Committee on Taxation
Kendra Kosko Isaacson, Senior Pensions Counsel, HELP Committee, U.S. Senate

Moderator: Edward Feibel, North-East

3:30 pm-4:30 pm eastern

12:30 pm pacific

1:30 pm mountain

2:30 pm central

News from the PBGC – Breakout Two

Panelists:

John Menke, Assistant General Counsel, Office of General Counsel, PBGC
Stephanie Cibinic, Deputy Assistant General Counsel for Regulatory Affairs, Office of General Counsel, PBGC
David DeMarco, Audit Branch Manager, Standard Termination Compliance Division, PBGC

Moderator: Jeff Bauer, Great Lakes

3:30 pm- 4:30 pm eastern

12:30 pm pacific

1:30 pm mountain

2:30 pm central

Regulatory Update on Health and Welfare Plans (discussion of new HRA rules - ICHRA, EBHRA) – Breakout One

Panelists:

Kevin Knopf, Senior Technician Reviewer, Health and Welfare Branch, EEE, Office of Chief Counsel, IRS
Jennifer Solomon, Assistant to the Branch Chief, Health and Welfare Branch, EEE, Office of Chief Counsel, IRS
Amber Rivers, Director, Office of Health Plan Standards and Compliance Assistance, DOL (invited)

Moderator: Jessica Kuester, Great Lakes

4:30 pm-5:30 pm eastern

1:30 pm pacific

2:30 pm mountain

3:30 pm central

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MEPs and PEPS - - Where do we go from here – Breakout Two

Panelists:

Pamela Kinard, Special Counsel, EEE, Office of Chief Counsel, IRS
Jeff Cimini, Senior Vice President, Retirement and RWM Solutions and Experience, Voya
Ted Schmelzle, Senior Director, Retirement Solution, Securian Financial
Wayne McClain III
Managing Director, Associate General Counsel | Law and Policy, TIAA

Moderator: Bob Toth, Great Lakes

4:30 pm-5:30 pm eastern

1:30 pm pacific

2:30 pm mountain

3:30 pm central

Employment Law and Terminology

Practitioner session to discuss COVID-19 related issues for layoffs, furloughs, and employees collecting unemployment benefits. The focus is on terminology that differs for employment law purposes and comparisons to employee benefit areas such as COBRA qualifying events, hours or service for vesting or eligibility, and whether certain events trigger distributable rights.

Panelists:

Tracy M. Billows, Seyfarth
Ruel Pile, Boutwell Faye

Moderator: Kristy Buckley, Pacific Coast

5:30 pm-6:30 pm eastern

2:30 pm pacific

3:30 pm mountain

4:30 pm central

Please note that this agenda is subject to change.

Friday, February 26, 2021

Welcome – Thomas Schendt and Lisa Germano

10 am eastern

7 am pacific

8 am mountain

9 am central

Remarks by the Commissioner & Director of Employee Plans

Speakers:

Edward Killen TE/GE Commissioner (acting)

Eric Slack Director, Employee Plans

Moderator: Lisa Germano, Mid-Atlantic

10:15am-11:15am eastern

7:15 am pacific

8:15 am mountain

9:15 am central

News from EP Exams and EP Rulings

Panelists:

Khin Chow Director, EP Rulings & Agreements

Cathy Jones Director, EP Examinations

Lou Leslie Special Assistant to the Director of Employee Plans

Moderator: Lori Oliphant, Gulf Coast

11:15 am-12:30 pm eastern

8:15 am pacific

9:15 am mountain

10:15 am central

EPCRS – Correction Updates

Panelists:

Mike Sanders Head of EPCRS

Lou Leslie Special Assistant to the Director of Employee Plans

Paul Hogan Program Coordinator

Moderator: Gary Blachman, Great Lakes

12:30 pm-1:30 pm eastern

9:30 am pacific

10:30 am mountain

11:30 am central

BREAK

1:30 pm-1:45 pm eastern

9:30 am pacific

10:30 am mountain

11:30 am central

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Key Guidance Updates from Chief Counsel (401(k); Care/Secure; Funding) Other Guidance

Panelists:

Stephen Tackney, Deputy Associate Chief Counsel (Employee Benefits),
EEE, Office of Chief Counsel, IRS

Linda Marshall, Senior Counsel, Qualified Plans Branch 1, EEE, Office of
Chief Counsel, IRS

Ron Rutherford-Triche, Chief, Qualified Plans Branch 2, EEE, Office of
Chief Counsel, IRS

Laura Warshawsky, Chief, Qualified Plans Branch 1, EEE, Office of Chief
Counsel, IRS

Moderator: Mark Bodron, Gulf Coast

1:45 pm-3:00 pm eastern

10:45 am pacific

11:45 am mountain

12:45 pm central

IRS Practitioner Panel

Representatives of each regional TE/GE Council discuss an issue of current interest in
their region.

Panelists:

Mid-Atlantic: Paul Protos

Gulf Coast: Eric Winwood

North-East: Kenneth F. Ginder

Pacific Coast: Scott Galbreath

Great Lakes: Carolyn McAllister

Moderator: Matthew Whitehorn, Mid-Atlantic

3:00 pm-4:00 pm- eastern

12:00 pm pacific

1:00 pm mountain

2:00 pm central

Executive Compensation

Panelists:

Stephen Tackney, Deputy Associate Chief Counsel (Employee Benefits),
EEE, Office of Chief Counsel, IRS

John Richards, Senior Technician Reviewer, Executive Compensation
Branch, EEE, Office of Chief Counsel, IRS

Ilya Enkishev, Attorney, Executive Compensation Branch, EEE, Office of
Chief Counsel, IRS

Moderator: Mary Powell, Trucker Huss Pacific Coast

4:00 pm-5:00 pm eastern

1:00 pm pacific

2:00 pm mountain

3:00 pm central

Conference is Adjourned.

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