



**2022 JOINT TE/GE COUNCIL  
EMPLOYEE PLANS  
ANNUAL MEETING**

**Making a  
difference with  
conversations since  
1993**

Register: [Link](#)

**February 24-25, 2022**

**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.\*

**TEGE ANNUAL MEETING AGENDA**  
**February 24-25, 2022**

*Government representatives will be speaking directly on dedicated panels scheduled during the meeting. Additionally, these representatives have been invited to attend the practitioner panels and breakout sessions on both days, and will participate in the discussions as appropriate.*

**Thursday, February 24, 2022**

**Welcome – Eric Winwood and Lori Oliphant**

**8:45 am-9:00 am**

**IRS/DOL Opening Remarks**

**9:00 am-10:00 am**

- Overview of activity and enforcement activity
- IRS Representatives (Invited)
- Tim Hauser (DOL) (Invited)
- Sunita Lough (IRS)
- Moderator: Eric Winwood (Gulf Coast)

**BREAK**

**10:00 am-10:15 am**

**EBSA Regulations, Investigations, Auditing and Reporting**

**10:15 am-11:15 am**

- Joe Canary (DOL) (Invited)
- Scot Albert (DOL) (Invited)
- Mabel Capolongo (DOL)
- Moderator: Lisa Germano (Mid-Atlantic)

**BREAK**

**11:15 am-11:30 am**

**EBSA Practitioners Panel**

**11:30 am-12:30 pm**

- David Stern (Northeast)
- Marcia Wagner (Northeast)
- Moderator: Kristy Buckley (Pacific Coast)

**BREAK/LUNCH**

**12:30 pm-1:00 pm**

**News from Capitol Hill**

**1:00 pm-2:00pm**

- Kendra Issacson (HELP Committee) (Invited)
- Moderator: Ed Feibel (Northeast)

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

## **BREAK**

**2:00 pm-2:15pm**

### **Breakout One**

**2:15 pm- 3:00 pm**

#### **Session A- News from the PBGC**

- John Menke (PBGC) (Invited)
- Moderator: Lori Oliphant (Gulf Coast)

#### **Session B- ESOP Discussion**

- Allison Wilkerson (Gulf Coast)
- Aracely Rios (Gulf Coast)
- Moderator: Jeff Bauer (Great Lakes)

## **BREAK**

**3:00 pm-3:15pm**

### **Breakout Two**

**3:15 pm-4:00 pm**

#### **Session A- M&A Activity Discussion re: Benefits by Practitioners**

- Meredith Gage (Gulf Coast)
- Patti Hedgepeth (Gulf Coast)
- Susan Wetzel (Gulf Coast)
- Moderator: Eric Winwood (Gulf Coast)

#### **Session B- Healthcare Compliance Discussion by Practitioners**

- Mary Powell (Pacific Coast)
- Jason Lacey (Gulf Coast)
- Moderator: Allison Fay (Pacific Coast)

## **BREAK**

**4:00 pm-4:15pm**

### **Breakout Three**

**4:15 pm-5:00pm**

#### **Session A- Defined Benefit Plan Activity**

- Anna Rappoport (Great Lakes)
- Blake Crohan (Gulf Coast)
- Moderator: Wayne Kamenitz (Northeast)

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

## **Session B- 401(k) Plan Compliance Discussion**

- Avery Neumark (Northeast)
- TBA (Pacific Coast)
- Moderator: Gary Blachman (Great Lakes)

## **BREAK**

**5:00 pm-5:15pm**

## **COVID 19 Updates and Discussion**

**5:15 pm-6:15 pm**

- Amy Epstein Gluck (Mid-Atlantic)
- Heidi Lyon (Great Lakes)
- Moderator: Lisa Van Fleet (Gulf Coast)

## **Adjourn: Closing Remarks: Eric Winwood and Lori Oliphant**

**6:15 pm**

**Friday, February 25, 2022**

**Welcome Remarks: Eric Winwood and Lori Oliphant**

**8:45 am-9:00 am**

**IRS Remarks**

**9:00 am-10:00 am**

- Sunita Lough (IRS) (Invited)
- Moderator: Lori Oliphant (Gulf Coast)

**BREAK**

**10:00 am-10:15 am**

**News from EP Exams and EP Rulings**

**10:15 am-11:15am**

- Khin Chow (IRS) (Invited)
- Cathy Jones (IRS)
- Lou Leslie (IRS)
- Moderator: Tom Schendt (Mid-Atlantic)

**BREAK**

**11:15 am-11:30 am**

**IRS Practitioners Panel**

**11:30 am-12:30 pm**

- Kelley Pointer (Gulf Coast)
- Dorothy Lank (Mid-Atlantic)
- Moderator: Ed Feibel (Northeast)

**BREAK/Lunch**

**12:30 pm-1:00 pm**

**EPCRS Update**

**1:00 pm-2:00 pm**

- Paul Hogan (IRS) (Invited)
- Lou Leslie (IRS)
- Joyce Khan (IRS)
- Moderator: Gary Blachman (Great Lakes)

**BREAK**

**2:00 pm-2:15 pm**

**ERISA Litigation**

**2:15 pm-3:00 pm**

- Courtney Walter (Mid-Atlantic)
- Sam Schwartz-Fenwick (Great Lakes)
- Moderator: Kristy Buckley (Pacific Coast)

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

**BREAK**

**3:00 pm-3:15 pm**

**Fireside Chat with IRS and DOL**

**3:15 pm-4:00 pm**

- Tim Hauser (DOL) (Invited)
- Amy Turner (DOL)
- Eric Slack (IRS) (Invited)
- Moderators: Eric Winwood, Lori Oliphant (Gulf Coast)

**Conference is Adjourned – Closing Remarks: Eric Winwood and Lori Oliphant**

**4:00 pm**