



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

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1993**

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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.

**Times are designated in Eastern Standard Time.*

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
- Tim Hauser (DOL)
- Eric Slack (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)
- Scott Albert (DOL)
- Tiffany Woo (DOL)
- Marc Sarata (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

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News from Capitol Hill

1:00 pm-2:00pm

- Kendra Issacson (HELP Committee)
- Rhonda Migdail (JT. Comm. Tax)
- Claire Diefenbach (JT. Comm. Tax)
- Moderator: Ed Feibel (Northeast)

BREAK

2:00 pm-2:15pm

Breakout One

2:15 pm- 3:00 pm

Session A- News from the PBGC

- Kenneth Cooper (PBGC)
- Melissa Rifkin (PBGC)
- David DeMarco (PBGC)
- 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 Hedgpeth (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: Alison 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)

Session B- 401(k) Plan Compliance Discussion

- Avery Neumark (Northeast)
- Katrina Veldkamp (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

- Edward Killen (IRS)
- Moderator: Lori Oliphant (Gulf Coast)

BREAK

10:00 am-10:15 am

News from EP Exams and EP Rulings

10:15 am-11:15am

- Eric Slack (IRS)
- 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)
- Todd Castleton (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)
- Lou Leslie (IRS)
- Thelma Diaz (IRS)
- Moderator: Gary Blachman (Great Lakes)

BREAK

2:00 pm-2:15 pm

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ERISA Litigation

2:15 pm-3:00 pm

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

BREAK

3:00 pm-3:15 pm

Fireside Chat with IRS and DOL

3:15 pm-4:30 pm

- Tim Hauser (DOL)
- Amy Turner (DOL)
- Mabel Capolongo (DOL)
- Eric Slack (IRS)
- Cathy Jones (IRS)
- Lou Leslie (IRS)
- Moderators: Eric Winwood, Lori Oliphant (Gulf Coast)

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

4:30 pm