

2023 JOINT TE/GE COUNCIL EMPLOYEE PLANS ANNUAL MEETING



Making a difference with conversations since 1991

Venue: Seyfarth Shaw LLP and Virtually

February 23-24, 2023

More Than 30 Years of Dialogue!

[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

The Joint TE/GE Council Employee Plans welcomes everyone to our 2023 Annual Meeting!

Please join our Board in thanking all of our speakers, especially from the Internal Revenue Service, the Department of Labor, and other governmental agencies, who dedicate valuable time and outreach to attend and participate during our Annual Meeting.

Joint TE/GE Council Employee Plans Annual Meeting

Thursday, February 23, 2023, Schedule

9:00AM – 9:15AM (EST)

Capitol Hill

Welcome Remarks

Wally Lloyd

(Pacific Coast Council)

9:15AM – 9:30AM (EST)

Capitol Hill

DOL Opening Remarks

An overview of activity for the DOL, with regard to Employee Plans, since the last Annual Meeting.

- [Ali Khawar](#), Principal Deputy Assistant Secretary for EBSA
Moderator: Kristy Buckley (Pacific Coast Council)

9:30AM – 10:15AM (EST)

Capitol Hill

EBSA Opening Remarks

An overview of EBSA activities, with special comments regarding enforcement priorities.

- [Timothy Hauser](#), Deputy Assistant Secretary for EBSA
Moderator: Tom Schendt (Mid-Atlantic Group)

10:20AM – 11:10AM (EST)

Capitol Hill

EBSA Regulations

Updates regarding regulatory activity in 2022 and upcoming regulations in 2023.

- [Joe Canary](#), Director of EBSA Regulations & Interpretations
Moderator: Norma Sharara (Mid-Atlantic Group)

11:15AM – 12:00PM (EST)

Capitol Hill

Practitioner's Panel

We highlight hot topics and challenging areas to inform EBSA and provide feedback to EBSA for solutions and ideas.

- [Roberta Watson](#), Wagner Law Group (Gulf Coast Group)
- [Kim Flett](#), ERISA & Tax Financial Services (Great Lakes Council)
- [Joanne Roskey](#), Miller & Chevalier (Mid-Atlantic Group)
Moderator: Stacey Austin (Great Lakes Council)

Joint TE/GE Council Employee Plans Annual Meeting

Thursday, February 23, 2023, Schedule

12:00PM – 12:35PM (EST)

Lunch Sessions for Each Council Meeting (in-person and virtual)

- Great Lakes Area TE/GE Council Rockville
 - Gulf Coast Area TE/GE Council Mount Pleasant
 - Pacific Coast Area TE/GE Council Fairfax
 - Northeast Pension Liaison Group Riverdale Park
 - Mid-Atlantic Pension Liaison Group U Street
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12:40PM – 1:10PM (EST)

Capitol Hill

EBSA SECURE 2.0 Listening Session

EBSA would like to hear from practitioners about any practical issues or concerns that may be of interest as guidance develops into 2023 and future years.

- [Joe Canary](#), Director of EBSA Regulations & Interpretations
Moderator: TBD
-

1:10PM – 1:55PM (EST)

Capitol Hill

EBSA Reporting and Auditing

Discussion on whether revisions to Form 5500 are coming in 2023. Updates regarding new audit standards with emphasis on independence guidance. Discussion on inspection results.

- [Scott Albert](#), Chief, Division of Reporting Compliance
 - [Marcus Aron](#), Chief, Division of Accounting Services
Moderator: Stacey Snyder (Mid-Atlantic Group)
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2:00PM – 2:55PM (EST)

Capitol Hill

Healthcare Compliance Discussion

Updates regarding FAQs (52, 53, 54, and 55) issued in 2022 for COVID-19 testing, transparency, and No Surprises.

- [Amber Rivers](#), Director, Office of Health Plan Compliance
- [Kevin Knopf](#), IRS, Office of Associate Chief Counsel, EEE
- [Shira McKinlay](#), IRS, Office of Associate Chief Counsel, EEE
Moderator: Lori Oliphant (Gulf Coast Council)

Joint TE/GE Council Employee Plans Annual Meeting

Thursday, February 23, 2023, Schedule

3:00PM – 3:55PM (EST)

Capitol Hill

News from Capitol Hill

Updates regarding legislative activity to watch in 2023.

- [Richard Phillips](#), HELP Committee, Pensions and Tax Policy Dir.
- [Kendra Kosko Isaacson](#), Pensions Policy Director, Sr Tax Counsel
- [Rhonda Migdail](#), Joint Committee on Taxation
- [Matthew Muma](#), Joint Committee on Taxation

Moderator: Gary Blachman (Great Lakes Council)

4:00PM – 4:45PM (EST)

Capitol Hill

Updates on ESOPs

Discussion regarding ESOP guidance consistency and ESOP fair market value determinations.

- [Timothy Hauser](#), Deputy Assistant Secretary for EBSA

Moderator: Jeff Bauer (Great Lakes Council)

4:55PM-5:35PM (EST)

Capitol Hill

Cybersecurity Issues

Discussion of various cybersecurity issues affecting employee plans.

- [Elham Fayyazi](#), EBSA Chief of Criminal Investigation Division
 - [Susan Rees](#), Wagner Law Group (Mid-Atlantic Group)
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5:40PM-5:55PM (EST)

Capitol Hill

Closing Remarks for the Day

Wally Lloyd (Pacific Coast Council)

6:00PM-7:00PM (EST)

6th Floor Café

Reception and Social Hour

Enjoy some light hors d'oeuvres and cocktails while we all catch up with each other. It's been a long time since we all met in person in February 2020!!

Joint TE/GE Council Employee Plans Annual Meeting

Friday, February 24, 2023, Schedule

9:00AM – 9:30AM (EST)

Capitol Hill

Welcome Remarks & History of Joint TE/GE Annual Meeting

- [Wally Lloyd](#), Dentons (Pacific Coast Council)
- [Lisa Germano](#), Actuarial Benefits & Design (Mid-Atlantic Group)
- [Henry Talavera](#), Polsinelli PC (Gulf Coast Council)

9:30AM – 10:00AM (EST)

Capitol Hill

IRS Opening Remarks

An overview of activity for the IRS with regard to TE/GE since the last Annual Meeting.

- [Edward Killen](#), IRS, TE/GE Commissioner
 - [Robert Choi](#), IRS, TE/GE Deputy Commissioner
- Moderator: [Kristy Buckley](#) (Pacific Coast Council)

10:05AM – 10:50AM (EST)

Capitol Hill

Employee Plan Issues

An overview of activity for the IRS with regard to Employee Plans since the last Annual Meeting

- [Eric Slack](#), IRS, TE/GE Director of Employee Plans
- Moderator: [Eric Winwood](#) (Gulf Coast Council)

10:55AM – 11:40AM (EST)

Capitol Hill

Pre-Exam Compliance and EP Examinations

Discussion regarding the 90-day letter pilot program and status. General discussion about examinations.

- [Eric Slack](#), IRS, TE/GE Director of Employee Plans
 - [Lou Leslie](#), IRS, EP Technical Advisor
 - [Cathy Jones](#), IRS, Director of EP Examinations
- Moderator: [Lisa Germano](#) (Mid-Atlantic Group)

11:45AM – 12:45PM (EST)

Lunch Session

- General Attendee Luncheon [All 10th Floor Rooms are Available](#)
- Joint TE/GE Council Board Meeting [Rockville](#)

Joint TE/GE Council Employee Plans Annual Meeting

Friday, February 24, 2023, Schedule

12:55PM – 1:40PM (EST)

Capitol Hill

Practitioner’s Panel

We highlight hot topics and challenging areas to inform the IRS and provide feedback to the IRS with solutions and ideas.

- [Avery Neumark](#), Marks Panath (Northeast Council)
 - [Anne Meyer](#), Snell & Wilmer (Pacific Coast Council)
 - [Dorothy Link](#), KLB Benefits Law Group (Mid-Atlantic Group)
- Moderator: Martin Tierney (Great Lakes Council)

1:45PM – 2:30PM (EST)

Capitol Hill

EPCRS and SECURE 2.0 Implications

Updates inside EPCRS, with special discussion regarding impacts of SECURE 2.0 and a lookback on pre-submission conferences.

- [Bill Anderson](#), IRS, Director of EPCRS
 - [Lou Leslie](#), EP Technical Advisor
 - [Paul Hogan](#), IRS, Program Coordinator
 - [Amy Moskowitz](#), IRS, Office of Assistant Chief Counsel, EEE
- Moderator: Wayne Kamenitz (Northeast Group)

2:35PM – 3:20PM (EST)

Capitol Hill

SECURE 1.0 and Remedial Amendments

Discussion regarding pending guidance for MEPs, 401(a)(9) RMD rules, and long-term part-time workers, including remedial amendment timelines.

- [Pamela Kinard](#), IRS, Office of Associate Chief Counsel, EEE
 - [Linda Marshall](#), IRS, Office of Associate Chief Counsel, EEE
 - [Kara Soderstrom](#), IRS, Office of Associate Chief Counsel, EEE
 - [Jamie Dvoretzky](#), IRS, Office of Associate Chief Counsel, EEE
- Moderator: Mary Powell (Pacific Council)

Joint TE/GE Council Employee Plans Annual Meeting

Friday, February 24, 2023, Schedule

3:25PM – 4:10PM (EST)

Capitol Hill

SECURE 2.0 and Remedial Amendments

Discussion regarding rollovers, emergency withdrawals, part-time workers, increased deferrals, hardships, ESOPs

- [Lou Leslie](#), IRS, EP Technical Advisor
- [Laura Warshawsky](#), IRS, Deputy Associate Chief Counsel, EEE
- [Jason Levine](#), IRS, Office of Associate Chief Counsel, EEE

Moderator: Meredith Treat

(Mid-Atlantic Council)

4:10PM – 4:55PM (EST)

Capitol Hill

Deferred Compensation

- [Ilya Enkishev](#), IRS, Office of Associate Chief Counsel, EEE
- [John Richards](#), IRS, Office of Associate Chief Counsel, EEE

Co-Moderators: Danielle Panter and Karen Field

(Pacific Coast Council) (Mid-Atlantic Group)

5:00PM

Closing Remarks – Meeting is Adjourned

Complete your survey!

Joint TE/GE Council Employee Plans Annual Meeting 2023 – General Information

General Information

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:



Typically, meeting materials consist of an important news article or a brief white paper describing a topic of interest. 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.

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 for members.

Joint TE/GE Council Employee Plans Annual Meeting 2023 – General Information

Registration and Fees

- \$375 for Early Bird pricing on in-person attendees
- \$475 for virtual attendees
- \$475 for Regular pricing on in-person attendees
- \$575 for all Late registrants

The last day to get Early Bird pricing is January 31st. Regular pricing applies starting February 1st. Late pricing applies 10 days or less before the meeting. Speakers and moderators still pay registration. Governmental, law students, accounting students, and press attendance is complimentary.

There is no registration on site for in-person attendees the day of the event. All registration will close on Tuesday, February 21st at 5:00 p.m., EST.

Breakfast, Lunch, and Reception

There will be a light continental breakfast offering both mornings between 8:00am-9:00am for the in-person attendees.

Lunch on Thursday will be a box lunch to accommodate breaking up into regional lunch meetings. If you are a speaker, student, governmental person, or person from the press who will not be attending a regional lunch meeting, you may grab a box lunch and use the Capitol Hill conference room. Regional lunch locations are listed below, and a floorplan can be found on the following page:

- Great Lakes Area TE/GE Council – Rockville
- Gulf Coast Area TE/GE Council – Mount Pleasant
- Pacific Coast Area TE/GE Council – Fairfax
- Northeast Pension Liaison Group – Riverdale Park
- Mid-Atlantic Pension Liaison Group – U Street

Lunch on Friday will be a buffet option. All of the 10th Floor conference rooms are available for people to sit and eat, with the exception of the Rockville conference room. The Board will be meeting in the Rockville conference room for a working Friday lunch.

All of the in-person meeting spaces are going to be 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.

Joint TE/GE Council Employee Plans Annual Meeting
2023 – General Information

