

# 2024 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  
And - Virtual Option

**Wednesday** February 21 - 2:00 pm  
to

**Friday** February 23 - 2:00 pm  
2024

[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 2024 Annual Meeting!*

Please join our Board in thanking all 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

## Wednesday, February 21, 2024

**Wednesday, February 21, 2024**

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**2:00 PM – 2:15PM (EST)**

Capitol Hill

### **Welcome Remarks**

Jeffrey M. Bauer,

BLG PLLC

(Great Lakes Council)

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**2:15PM – 3:15 PM (EST)**

Capitol Hill

### **Healthcare Compliance Discussion**

*Update on health benefits; plan design compliance; fertility benefits; mental health parity; IDR process; transparency; proposed reg on fixed indemnity, junk insurance, level-funded plans.*

- Amber Rivers, Director, Office of Health Plan Compliance, DOL (invited)
- Kevin Knopf, IRS, Office of Associate Chief Counsel, EEE (invited)
- Shira McKinlay, IRS, Office of Associate Chief Counsel, EEE (invited)
- Jason Sandoval, IRS Office of Associate Chief Counsel, EEE (invited)
- Linda Mendel, BTC (Invited)

Moderator: Mary Powell, Trucker Huss (Pacific Coast Council)

Joint TE/GE Council Employee Plans Annual Meeting  
Wednesday, February 21, 2024

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**3:15PM – 4:15 PM (EST)**

**Executive Compensation**

**[Description needed here]**

- Richard Nettles, Office of Associate Chief Counsel, EEE (invited)
- John Richards, IRS, Office of Associate Chief Counsel, EEE (invited)

Moderator: Eric Winwood, Sidley Austin LLP (Gulf Coast)

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**4:15PM – 5:15 PM (EST)**

**ESOPs**

*Discussion regarding ESOP guidance consistency, fair market value determinations, transaction trends and enforcement activity, including fiduciary process and responsibilities.*

- Tim Hauser, Deputy Assistant Secretary for EBSA (invited)
- Joseph Canary, Director, Office of Regulations and Interpretations, DOL (invited)
- Lou Leslie, , IRS, EP Technical Advisor (invited)
- (invited)

Moderator: Allison Wilkerson, McDermott Will & Emery (Gulf Coast)

Joint TE/GE Council Employee Plans Annual Meeting  
Thursday, February 22, 2024

**Thursday, February 22, 2024**

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**9:00AM – 9:15AM (EST)**

Capitol Hill

**Welcome Remarks**

Jeffrey M. Bauer,  
BLG PLLC

(Great Lakes Council)

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**9:15AM – 10:00AM (EST)**

Capitol Hill

**Views from the EBSA Assistant Secretary**

*An overview of EBSA activities.*

- Lisa M. Gomez, Assistant Secretary for Employee Benefits Administration Security (invited)

Moderator: Jeffrey M. Bauer, BLG PLLC

(Great Lakes Council)

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**10:00AM – 10:45AM (EST)**

Capitol Hill

**EBSA Overview**

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

- Tim Hauser, Deputy Assistant Secretary for EBSA (invited)

Moderator: Ann Caresani, Baker & Hostetler LLP

(Great Lakes)

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**10:45AM – 11:00AM (EST)**

**Break**

Joint TE/GE Council Employee Plans Annual Meeting  
Thursday, February 22, 2024

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**11:00AM – 12:00PM (EST)**

Capitol Hill

**Practitioner's Panel**

*Hot topics and challenging areas to inform EBSA and provide feedback to EBSA for solutions and ideas.*

- Practitioners from multiple councils to be assigned.

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

(Add two or three other Councils)

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**12:15PM – 1:00PM (EST)**

**Box Lunch**

Capitol Hill

**Cybersecurity**

- Elham Fayyazi, Director of Division of Criminal Investigations, EBSA (invited)

Moderator: Edward Feibel, Eaton Peabody, Northeast

# Joint TE/GE Council Employee Plans Annual Meeting

## Thursday, February 22, 2024

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### 1:00PM – 2:00PM (EST)

Capitol Hill

#### **SECURE 2.0**

*EBSA and IRS would like to hear from practitioners about any practical issues or concerns that may be of interest as guidance develops into 2024 and future years. Topics will include § 72(t), domestic abuse, catch-up, and student loan repayments.*

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- Jeff Turner, Deputy Director, Office of Regulations and Interpretations, DOL (invited)
- Jason Levine, IRS, Office of Associate Chief Counsel, EEE (invited)
- Isaac Stein, IRS, Office of Associate Chief Counsel, EEE (invited)
- Angelique Carrington, IRS, Office of Associate Chief Counsel, EEE (invited)

Moderator: Lori Oliphant, Steptoe Johnson, LLP      Gulf Coast

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### 2:00PM – 3:00PM (EST)

Capitol Hill

#### **Fiduciary Update**

*Proposed fiduciary advice regulations and related prohibited transaction exemptions.*

- Tim Hauser, Deputy Assistant Secretary, EBSA (invited)
- Joe Canary, Director, Office of Regulations and Interpretations, EBSA (invited)
- Chris Cosby, Director, Office of Exemption Determinations, EBSA (invited)

Moderator: Gary Blachman, Ice Miller (Great Lakes)

# Joint TE/GE Council Employee Plans Annual Meeting

## Thursday, February 22, 2024

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**3:00PM – 3:15PM (EST)**

**BREAK**

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**3:15PM – 4:00PM (EST)**

Capitol Hill

### **Missing Participants**

*Update on efforts regarding missing participants and uncashed checks.*

- Tim Hauser, Deputy Assistant Secretary, EBSA (invited)
- Joe Canary, Director, Office of Regulations and Interpretations, DOL (invited)
- Colleen McKee, Director, Office of Enforcement, EBSA (invited)

Moderator: Thomas Schendt, Alston & Bird (Mid-Atlantic)

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**4:00PM – 5:00PM (EST)**

Capitol Hill

### **Update from The Hill**

*Updates regarding legislative activity to watch in 2024.*

- 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) (invited)
- Rhonda Migdail, Joint Committee on Taxation (invited)
- Matthew Muma, Joint Committee on Taxation (invited)

Moderator: Jessica Kuester, IslerDare PC

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**5:00PM – 7:00PM (EST)**

Capitol Hill

**RECEPTION 6<sup>th</sup> floor**



Joint TE/GE Council Employee Plans Annual Meeting  
Friday, February 23, 2024

**FRIDAY February 23, 2024**

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**9:00AM – 9:45AM (EST)**

Capitol Hill

**Welcome Comments and IRS Opening Remarks**

*An overview of IRS activity.*

- Edward Killen, IRS, TE/GE Commissioner
- Robert Choi, IRS, TE/GE Deputy Commissioner

Moderator: Ann Caresani, Baker & Hostetler LLP (Great Lakes Council)

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**9:45AM – 10:45AM (EST)**

Capitol Hill

**Employee Benefit Plan Review**

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

- Laura Warshawsky, Deputy Associate Chief Counsel, EEE (invited)
- Eric Slack, IRS, TE/GE Director of Employee Plans (invited)

Moderator: Ann Caresani, Baker & Hostetler LLP (Great Lakes)

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**10:45AM – 11:00AM (EST)**

**BREAK**

# Joint TE/GE Council Employee Plans Annual Meeting

## Friday, February 23, 2024

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**11:00AM – 12:00PM (EST)**

Capitol Hill

### **Pre-Exam Compliance; EP Examinations; EPCRS Update; Determination Letters**

*Discussion regarding the 90-day letter pilot program and status with general discussion about examinations and including an EPCRS update.*

- Eric Slack, IRS, TE/GE Director of Employee Plans (invited)
- Lou Leslie, IRS, EP Technical Advisor (invited)
- Paul Hogan, IRS, Program Coordinator (invited)
- Amy Moskowitz, IRS, Office of Associate Chief Counsel, EEE (invited)

Moderator: Jamie Jones, Harnett Reyes-Jones, LLC (Gulf Coast Council) (?)

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**12:00PM – 12:15PM (EST)**

**Lunch Session (Box lunch)**

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**12:15PM – 1:15PM (EST)**

Capitol Hill

### **Guidance: Chief Counsel/Commissioner Reviews**

*Recent and upcoming guidance regarding MEPs, RMD rules, and long-term part-time workers, including remedial amendment timelines.*

- Brandon Ford, IRS, Office of Associate Chief Counsel, EEE (invited)
- Kara Soderstrom, IRS, Office of Associate Chief Counsel, EEE (invited)
- Lou Leslie, IRS, EP Technical Advisor (invited)

Moderator: Wayne Kamenitz, Segal Group (Northeast)

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**1:15 PM – 2:15 PM (EST)**

Capitol Hill

**Practitioner's Panel**

*Hot topics and challenging areas to inform the IRS and provide feedback to the IRS with solutions and ideas.*

- Practitioners from multiple councils to be assigned (one or 2 councils – not the same as the ones on Thursday's session).

Moderator: Kristy Buckley, Buckley Maxwell, Dixon, Dolezal (Pacific)

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**2:15 PM (EST)**

**Closing Remarks - Meeting Adjournment**

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

## Joint TE/GE Council Employee Plans Annual Meeting 2024 – 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](https://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.

# Joint TE/GE Council Employee Plans Annual Meeting 2024 – General Information

## Hotel Rooms

There are no blocks of hotel rooms reserved.

## Registration and Fees

Early Bird pricing for in-person attendees is available until January 31<sup>st</sup>. Regular pricing for in-person attendees applies starting February 1<sup>st</sup>. Late registration pricing applies 10 days before the meeting. Governmental attendees, law students, accounting students, and press attendance is complimentary with early registration and dependent upon space.

- \$375 for in-person attendees, registered before February 1, 2024
- \$475 for in-person attendees, registered on or after February 1, 2024
- \$475 for virtual attendees
- \$575 for all registrations after February 10, 2024
- \$300 for practitioners with less than 5 years' experience

**There is no on site registration for in-person attendees the day of the event.**

**All registration will close on Tuesday, February 20<sup>th</sup> 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 Thursday and 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 conference room.

All the in-person meeting spaces are on the 10<sup>th</sup> 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 6<sup>th</sup> floor.

