

2025 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
& Virtual Option**

Wednesday February 26, 2:00pm
to
Friday February 28, 2:00pm

[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

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 in our Annual Meeting.

Wednesday February 26, 2025

2:00 PM – 2:15PM (EST)

Capitol Hill Room

Welcome Remarks

Wayne Kamenitz,

Segal

(Northeast Pension Liaison Group)

2:15PM – 3:15 PM (EST)

Capitol Hill Room

Health and Welfare General Updates

Updates on health benefits, advanced EOBs, level funded plans, IDR process, preventative care, and mental health parity.

- Elizabeth Schumacher, Deputy Director, Division of Regulations and Standards, US Dept of Labor, EBSA
- Kevin Knopf, IRS, Office of Associate Chief Counsel, EEE
- Shira McKinlay, IRS, Office of Associate Chief Counsel, EEE
- Linda Mendel, Treasury Benefits Tax Counsel (invited)
- Matt Meidell, DOL, EBSA

Moderator: Kristy Buckley (Pacific Coast)

3:15PM – 4:15 PM (EST)

Executive Compensation

- Ilya Enkishev, Office of Associate Chief Counsel, EEE
- Thomas Scholz, IRS, Office of Associate Chief Counsel, EEE

Moderator: Eric Winwood, Sidley Austin LLP (Gulf Coast Area TE/GE Council)

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
- Fred Wong, Office of Regulations and Interpretations, DOL
- Lou Leslie, IRS, EP Technical Advisor
- Moderator: Allison Wilkerson, McDermott Will & Emery (Gulf Coast Area TE/GE Council)

Thursday February 27, 2025

9:00AM – 9:15AM (EST)

Capitol Hill Room

Welcome Remarks

Edward Feibel, Eaton Peabody
(Northeast Pension Liaison Group)

9:15AM – 10:00AM (EST)

Capitol Hill Room

Views from the EBSA Assistant Secretary

An overview of EBSA activities.

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

Moderator: Wayne Kamenitz, Segal
(Northeast Pension Liaison Group)

10:00AM – 10:45AM (EST)

Capitol Hill Room

EBSA Overview

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

- Tim Hauser, Deputy Assistant Secretary for EBSA

Moderator: TBA

10:45AM – 11:00AM (EST)

Break

11:00AM – 12:00PM (EST)

Capitol Hill Room

Practitioner's Panel

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

- Jim Wooten, University of Buffalo, Northeast
- Allison Wilkerson, McDermott Will & Emery LLP, Gulf Coast
- Dominic DeMatties, Thompson Hine, Mid Atlantic
- Heidi Lyon, Warner Norcross + Judd LLP, Great Lakes

Moderator: Maria Hurd, Belfint Lyons & Shuman, P.A. (Mid-Atlantic Pension Liaison Group)

12:00PM – 12:30PM (EST)

LUNCH

Thursday February 27, 2025

12:30PM – 1:30PM (EST)

Capitol Hill Room

Cybersecurity

An overview of EBSA cybersecurity investigations, EBSA's new guidance involving healthcare plans, the rise in cybersecurity breaches and incidents particularly targeting the health industry and health plans, and what EBSA expects fiduciaries and plan sponsors to be doing regarding cybersecurity.

- Elham Fayyazi, Director of Division of Criminal Investigations, EBSA
- Moderator: Ann Caresani, Baker & Hostetler LLP (Great Lakes Area TE/GE Council) Ann will take this and organize speakers
-

1:30PM – 2:30PM (EST)

Capitol Hill Room

Mental Health Parity

We will discuss the updated landscape of Mental Health Parity compliance, importance of analyzing evidentiary data inside the plan, and importance of having a report.

- Amber Rivers, Director of Health Plan Compliance, DOL, EBSA
- Beth Baum, DOL, EBSA
- David Sydlik, DOL, EBSA
- David Mlawsky, CMS, HHS (invited)

Moderator: Kristy Buckley (Pacific) [or Kristy will find]

2:30PM – 3:30PM (EST)

Capitol Hill Room

Fiduciary Update

DOL regulatory initiatives and enforcement

- Tim Hauser, Deputy Assistant Secretary, EBSA
- Jeffrey J. Turner, Director, Office of Regulations and Interpretations, EBSA
- Karen Lloyd, Office of Regulations and Interpretations, EBSA

Moderator: Jeff Bauer BLG PLLC (Great Lakes Area TE/GE Council)

3:30PM – 3:45PM (EST)

BREAK

Thursday February 27, 2025

3:45PM – 4:45PM (EST)

Capitol Hill Room

ERISA Preemption and the PBM Environment

This panel will cover a primer on ways in which states are attempting to regulate Pharmacy Benefit Managers and the fallout of litigation from these activities that have been re-mapping ERISA preemption principles.

Moderator: Kristy Buckley (Pacific Coast)

4:45PM – 5:30PM (EST)

Capitol Hill Room

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

Moderator: Edward Feibel, Eaton Peabody
(Northeast Pension Liaison Group)

5:30PM – 7:00PM (EST)

RECEPTION 6th floor

FRIDAY February 28, 2025

9:00AM – 9:45AM (EST)

Capitol Hill Room

Welcome Comments and IRS Opening Remarks

An overview of IRS activity.

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

Moderator: Wayne Kamenitz, Segal
(Northeast Pension Liaison Group)

9:45AM – 10:45AM (EST)

Capitol Hill Room

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
- Eric Slack, IRS, TE/GE Director of Employee Plans

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

10:45AM – 11:00AM (EST)

BREAK

11:00AM – 12:00PM (EST)

Capitol Hill Room

EP Examinations; EPCRS Update; Determination Letters

Discussion regarding updates and practical developments impacting EP examinations, EPCRS and Determination Letters.

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

Moderator: Gary Blachman, Ice Miller (Great Lakes Area TE/GE Council)

FRIDAY February 28, 2025

12:00PM – 12:15PM (EST)

Lunch Session (Sandwich Buffet)

12:15PM – 1:15PM (EST)

Capitol Hill Room

Guidance: Chief Counsel/Commissioner Reviews

In-depth discussion of recent and upcoming guidance affecting qualified retirement plans.

- Brandon Ford, IRS, Office of Associate Chief Counsel, EEE (RMDs)
 - Christina Cerasale, IRS, Office of Associate Chief Counsel, EEE (Automatic Enrollment)
 - Jason Levine, IRS, Office of Associate Chief Counsel, EEE (student loan repayments)
 - Lou Leslie, IRS, EP Technical Advisor
 - Moderator: Lori Oliphant, Steptoe & Johnson PLLC Gulf Coast Area TE/GE Council
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1:15 PM – 2:15 PM (EST)

Capitol Hill Room

Practitioner's Panel

Current, practical issues and suggested solutions to inform the IRS and provide feedback.

- Practitioners from multiple councils to be assigned

Moderator: Brandon Long (Gulf Coast Area TE/GE Council)

2:15 PM (EST)

Closing Remarks - Meeting Adjournment

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

Moderator: Edward Feibel, Eaton Peabody

(Northeast Pension Liaison Group)

Joint TE/GE Council Employee Plans Annual Meeting

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: TFGECouncil.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.

Hotel Rooms

There are no blocks of hotel rooms reserved.

Registration and Fees

Early Bird pricing for in-person attendees is available until January 31st. Regular pricing for in-person attendees applies starting February 1st. 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, 2025
- \$475 for in-person attendees, registered on or after February 1, 2025
- \$475 for virtual attendees
- \$575 for all registrations after February 10, 2025
- \$300 for practitioners with less than 5 years' experience

There is no onsite registration for in-person attendees the day of the event.

All registration will close on Monday, February 24th 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 Room conference room.

All the in-person meeting spaces are 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.