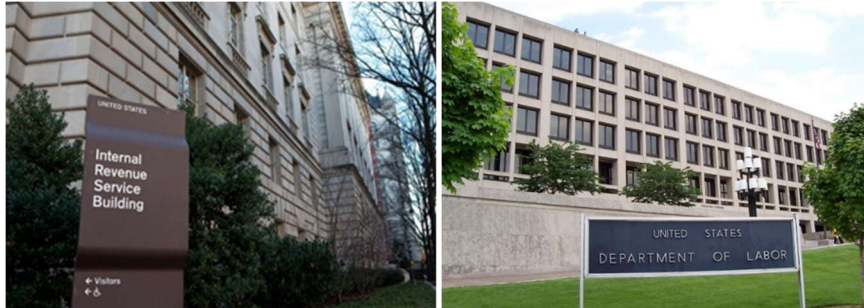


## **2026 Joint TE/GE Council Employee Plans Annual Meeting**



### **Making a difference with conversations since 1991**

**Venue: Seyfarth Shaw LLP  
975 F Street, NW  
Washington, DC 20004  
& Virtual Option**

**Wednesday** February 25, 2:00pm  
to

**Friday** February 27, 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 to thank all our speakers, especially from the Internal Revenue Service, the Department of Labor, and other governmental agencies who voluntarily dedicate valuable time and outreach throughout the year, including by attending and participating in our Annual Meeting.

## Joint TE/GE Council Employee Plans Annual Meeting

### Wednesday February 25, 2026

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**2:00 PM – 2:15PM (EST)**

Capitol Hill Room

#### **Welcome Remarks**

Lisa Germano, Actuarial Benefits & Design Company (Mid-Atlantic Pension Liaison Group)

Dominic DeMatties, Thompson Hine LLP (Mid-Atlantic Pension Liaison Group)

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**2:15PM – 3:15 PM (EST)**

Capitol Hill Room

#### **Reflections on Retirement Reform**

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

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**3:15PM – 4:15 PM (EST)**

Capitol Hill Room

#### **Health and Welfare General Updates**

*Updates on direct primary care service arrangements, health savings accounts, fertility benefits, and mental health parity.*

- Elizabeth Schumacher, Deputy Director, Division of Regulations and Standards, US Dept of Labor, EBSA (invited)
- Kevin Knopf, IRS, Office of Associate Chief Counsel, EEE
- Marissa Gordon-Nguyen, US Dept of Health and Human Services, Office for Civil Rights (invited)

Moderator: Kristy Buckley, BMDD Law (Pacific Coast Area TE/GE Council)

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**4:15PM – 5:15 PM (EST)**

Capitol Hill Room

#### **Executive Compensation**

*Discussion regarding timely executive compensation issues.*

- Kurt Lawson, Deputy Benefits Tax Counsel, Department of the Treasury (invited)
- Richard Nettles, Former IRS, Office of Associate Chief Counsel, EEE (currently Latham & Watkins LLP)
- Sasha Belinkie, White & Case LLP (Northeast Pension Liaison Group)

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

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### Thursday February 26, 2026

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**9:00AM – 9:05AM (EST)**

Capitol Hill Room

#### **Welcome Remarks**

Dominic DeMatties, Thompson Hine LLP (Mid-Atlantic Pension Liaison Group)

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**9:05AM – 9:50AM (EST)**

Capitol Hill Room

#### **EBSA Updates & Priorities**

*An overview of current EBSA priorities.*

- Michael Schloss, Deputy Assistant Secretary for Program Operations of the Employee Benefits Security Administration, US Dept of Labor (invited)
- Ali Khawar, Former Principal Deputy Assistant Secretary, US Dept of Labor, EBSA
- Tim Hauser, Former Deputy Assistant Secretary for Program Operations, US Dept of Labor, EBSA

Moderator: Ann Caresani, Baker & Hostetler LLP (Great Lakes Area TE/GE Council)

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## Joint TE/GE Council Employee Plans Annual Meeting

**Thursday February 26, 2026**

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**9:50AM – 10:50AM (EST)**

Capitol Hill Room

### **Practitioner's Panel**

*Current, practical issues and suggested solutions to inform EBSA and provide feedback.*

- Allison Wilkerson, McDermott Will & Schulte (Gulf Coast Area TE/GE Council)
- Mary Giganti, Waldheger Coyne LPA (Great Lakes Area TE/GE Council)
- Katuri Kaye, Trucker Huss (Pacific Coast Area TE/GE Council)

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

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**10:50 AM – 11:00AM (EST)**

### **Break**

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**11:00 AM – 11:45PM (EST)**

Capitol Hill Room

### **Lifetime Income Products**

*Robust discussion of current thinking and open questions pertaining to lifetime income products in defined contribution plans*

- Bob Toth, Fiduciary Law Center (Great Lakes Area TE/GE Council)
- Evan Giller, Boutwell Fay LLP (Northeast Pension Liaison Group)

Moderator: Dominic DeMatties, Thompson Hine LLP (Mid-Atlantic Pension Liaison Group)

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**11:45PM – 1:00PM (EST)**

### **Lunch**

### **Area Council Meetings**

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**1:00PM – 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 (invited)

Moderator: Lisa Gomez, LMG Collaborative Consulting Solutions (Northeast Pension Liaison Group)

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**1:30PM – 2:30PM (EST)**

Capitol Hill Room

### **Health Plans, Healthcare, and AI**

*Discussion of the changing landscape of healthcare providers using AI for purposes of billing and documenting medical records juxtaposed by the changing landscape of health plans using AI for purposes of reviewing claims and appeals.*

- Amy Turner, Deputy Director, Innovation Center, Centers for Medicare & Medicaid Services (invited)
- Elizabeth Schumacher, Director (Acting), Office of Health Plan Standards and Compliance Assistance, US Dept of Labor, EBSA (invited)
- Amber Rivers, Groom Law Group, Chartered

Moderator: W. Waldan Lloyd, Dentons Durham Jones Pinegar P.C. (Pacific Coast Area TE/GE Council)

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## Joint TE/GE Council Employee Plans Annual Meeting

### Thursday February 26, 2026

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**2:30PM – 3:30PM (EST)**

Capitol Hill Room

#### **Alternative Assets**

*Focused analysis of DOL regulatory initiatives and priorities related to alternative assets.*

- Ali Khawar, Former Principal Deputy Assistant Secretary, US Dept of Labor, EBSA
- David Kaleda, Eversheds Sutherland

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

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**3:30PM – 3:45PM (EST)**

**Break**

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**3:45PM – 4:45PM (EST)**

Capitol Hill Room

#### **Direct-to-Consumer Model**

*This panel will cover a primer on ways in which the Direct-to-Consumer model is changing the landscape of prescription drug access and where health plans fit.*

- Katie Amin, Groom Law Group, Chartered
- Shira McKinlay, Thompson Hine LLP

Moderator: Mary Powell, Trucker Huss (Pacific Coast Area TE/GE Council)

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**4:45PM – 5:30PM (EST)**

Capitol Hill Room

#### **Update from The Hill**

*Updates regarding legislative activity to watch in 2026.*

- 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
- Clare Diefenbach, Joint Committee on Taxation (invited)

Moderator: Gary Blachman, Akerman LLP (Great Lakes Area TE/GE Council)

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**5:30PM – 7:00PM (EST)**

**Reception – 6<sup>th</sup> Floor**

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### Friday February 27, 2026

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**9:00AM – 9:05AM (EST)**

Capitol Hill Room

#### **Welcome Remarks**

Lisa Germano, Actuarial Benefits & Design Company (Mid-Atlantic Pension Liaison Group)

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**9:05AM – 9:35 AM (EST)**

Capitol Hill Room

#### **IRS Opening Remarks**

*An overview of IRS activity.*

- Edward Killen, IRS, TE/GE Commissioner

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

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## Joint TE/GE Council Employee Plans Annual Meeting

**Friday February 27, 2026**

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**9:35AM – 10:35AM (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, IRS, Deputy Associate Chief Counsel, EEE
- John Hughes, IRS, Director, EP (Acting)
- Lou Leslie, IRS, EP Technical Advisor

Moderator: Eric Slack, Thompson Hine LLP (Mid-Atlantic Pension Liaison Group)

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**10:35AM – 10:45AM (EST)**

**Break**

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**10:45AM – 11:45PM (EST)**

Capitol Hill Room

### **EP Examinations; EPCRS Update; Opinion Letters**

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

- Lou Leslie, IRS, EP Technical Advisor
- John Hughes, IRS, Director, EP (Acting)
- Paul Hogan, IRS, Program Coordinator (invited)

Moderator: Rachel Leiser Levy, Deloitte Tax LLP (Mid-Atlantic Pension Liaison Group)

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**11:45PM – 12:15PM (EST)**

**Lunch (Boxed Lunches)**

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**12:15PM – 1:15PM (EST)**

Capitol Hill Room

### **Practitioner's Panel**

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

- Brandon Long, McAfee & Taft (Gulf Coast Area TE/GE Council)
- Sarah J. Touzalin, Seyfarth Shaw (Great Lakes Area TE/GE Council)
- Julia Love, Thompson Hine LLP (Mid-Atlantic Pension Liaison Group)

Moderator: Audrey Fenske, Stinson LLP (Great Lakes Area TE/GE Council)

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**1:15 PM – 2:15 PM (EST)**

Capitol Hill Room

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

*Discussion of recent IRS guidance.*

- Laura Warshawsky, IRS, Deputy Associate Chief Counsel, EEE
- Christina Cerasale, IRS, Office of Associate Chief Counsel, EEE
- Kara Soderstrom, IRS, Office of Associate Chief Counsel, EEE
- Lou Leslie, IRS, EP Technical Advisor

Moderator: Lori Oliphant, Steptoe & Johnson PLLC (Gulf Coast Area TE/GE Council)

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**2:15 PM (EST)**

Capitol Hill Room

### **Closing Remarks - Meeting Adjournment**

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

Dominic DeMatties, Thompson Hine (Mid-Atlantic Pension Liaison Group)

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## 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: [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.

### Hotel Rooms

There are no blocks of hotel rooms reserved.

### Registration and Fees

Early Bird pricing for in-person attendees is available until February 2<sup>nd</sup>. Regular pricing for in-person attendees applies starting February 3<sup>rd</sup>. Late registration pricing applies 10 days before the meeting. Governmental attendees, law student, and accounting student attendance is complimentary with early registration and dependent upon space.

- \$375 for in-person attendees, registered before February 3, 2026
- \$475 for in-person attendees, registered on or after February 3, 2026
- \$475 for virtual attendees
- \$575 for all registrations after February 11, 2026
- \$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 23<sup>th</sup> at 5:00 p.m., EST.**

## Joint TE/GE Council Employee Plans Annual Meeting

### **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 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 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.