

**Exempt Organizations Update – Friday, November 17, 2023**

**Via Webinar**

<p>10:00-10:10 ET 9:00-9:10 CT 8:00-8:10 MT 7:00-7:10 PT</p>	<p><b>Welcome/Initial Comments</b></p> <p>Danika H. Mendrygal, Chair</p>
<p>10:10-11:10 ET 9:10-10:10 CT 8:10-9:10 MT 7:10-8:10 PT</p>	<p><b>IRS Guidance Update</b></p> <p>Rachel Leiser Levy, Associate Chief Counsel, EEE/EOET Lynne A. Camillo, Deputy Associate Chief Counsel, EEE/EOET Seth J. Groman, IRS Chief Counsel, General Attorney, Tax Michael Gruccio, Attorney, Exempt Organizations IRS Office of Chief Counsel</p> <p>Moderator: Elinor Ramey, Steptoe &amp; Johnson LLP</p>
<p>11:20-12:50 ET 10:20-11:50 CT 9:20-10:50 MT 8:20-9:50 PT</p>	<p><b>IRS Exempt Organizations Division Update and Q&amp;A</b></p> <p>Robert Malone, Director of Exempt Organizations and Government Entities, IRS John Montague, Acting Senior Technical Advisor to the Director, Exempt Organizations, IRS</p> <p>Moderators: Anne Fulton, Deloitte, Preston Quesenberry, KPMG, and Jennifer Becker Harris, Clark Nuber</p>
<p>12:50-1:20 ET 11:50-12:20 CT 10:50-11:20 MT 9:50-10:20 PT</p>	<p><b>Break</b></p>
<p>1:20-2:20 ET 12:20-1:20 CT 11:20-12:20 MT 10:20-11:20 PT</p>	<p><b>Endowments and Restricted Funds: Managing UPMIFA In Unpredictable Times</b></p> <p>Bernardo Cuadra, Assistant Attorney General, Commonwealth of Massachusetts Carrie Trowbridge, GC at New York Community Trust Alex Buchholz at PKF O'Connor Davies</p> <p>Moderator: Susan Vignola, Patterson Belknap Webb &amp; Tyler LLP</p>
<p>2:30-3:30 ET 1:30-2:30 CT 12:30-1:30 MT 11:30-12:30 PT</p>	<p><b>ESG and Tax-Exempts: What do tax advisors need to know?</b></p> <p>Katherine Pease, Managing Director, Pathstone Christie Tillapaugh, President-Elect of Dentons Cohen &amp; Grisby, Lori McLaughlin, Crowe, Tax Partner, Exempt Organization Tax Services Practice Victor Sturgis, Crowe, Partner-ESG Solutions Practice</p> <p>Moderator: Elizabeth “Betsy” Krisher, CEO, Maher Duessel</p>

3:40-4:40 ET 2:40-3:40 CT 1:40-2:40 MT 12:40-1:40 PT	<b>Powering Your Organization's Future with Renewable Energy Inflation Reduction Act Opportunities for Tax-Exempt Organizations</b>  Nick Kappas, Thompson Coburn  Moderator: Ben Alderton, Moss Adams
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**Title Name:** Exempt Organization Update – November 17, 2023.

**Date & Time:** See above agenda.

**Time:** 330 minutes.

**Recommended CPE:** 5.5 credit hours.

**Recommended CLE:** 5.5 credit hours.

**Delivery Method:** Group Internet Based

**Field of Study:** Taxes.

**Total Price:** \$75. For more information regarding refunds and cancellation policies, please contact [jschragg@newtongrangellc.com](mailto:jschragg@newtongrangellc.com).

**Registration Method:** <http://www.eocouncil.org/events.html>

**Learning Objectives:** Explore in detail the latest statutory, regulatory and judicial developments impacting tax exempt organizations.

**Program Description:** See above agenda.

**Speakers:** See above agenda.

**Advanced Preparation:** Please suggest areas of inquiry, questions and/or comments and submit your suggestions to by [clicking here](#) or, please use the Members' Discussion Forum to add your questions and comments. Please [click here](#) to access that Forum (TEGE members only).

**Prerequisites:** None.

**Program Level:** Overview.