

Exempt Organizations Update – Thursday and Friday, March 2-3, 2023

Via Webinar Only

Thursday, March 2, 2023

<p>11:00-11:10 ET 10:00-10:10 CT 9:00-9:10 MT 8:00-8:10 PT</p>	<p style="text-align: center;">Welcome/Initial Comments</p> <p style="text-align: center;">Danika H. Mendrygal, Mendrygal Law, PLLC</p>
<p>11:10-12:10 ET 10:10-11:10 CT 9:10-10:10 MT 8:10-9:10 PT</p>	<p style="text-align: center;">State Regulation of Charitable Organizations</p> <p style="text-align: center;">Elizabeth Kim, Supervising Deputy Attorney General at California Department of Justice Leslie Friedlander, Assistant Attorney General, Charitable Trusts Section, Consumer Protection Division Michael Schlein, Division Administrator, State of Maryland</p> <p style="text-align: center;">Moderator: Greg Lam, Copilevitz, Lam & Raney, LLC</p>
<p>12:10-1:40 ET 11:10-12:40 CT 10:10-11:40 MT 9:10-10:40 PT</p>	<p style="text-align: center;">EO Hot Topics Roundtable</p> <p style="text-align: center;">Michael Durham, Kirton McConkie PC Marc Owens, Loeb & Loeb, LLP <i>(Invited)</i> Tracy Paglia, Moss Adams</p> <p style="text-align: center;">Moderators: Nancy McGlamery, Adler & Colvin</p>
<p>1:40-2:00 ET 12:40-1:00 CT 11:40-12:00 MT 10:40-11:00 PT</p>	<p style="text-align: center;">Break</p>
<p>2:00-3:00 ET 1:00-2:00 CT 12:00-1:00 MT 11:00-12:00 PT</p>	<p style="text-align: center;">Current Issues with Healthcare Organizations</p> <p style="text-align: center;">Michael N. Fine, Wyatt, Tarrant & Combs, LLP James J. Janssen Jr., MBA, J.D, Mayo Clinic Mackenzie McNaughton, Dorsey & Whitney LLP</p> <p style="text-align: center;">Moderator: Preston Quesenberry, KPMG</p>

***Presented in cooperation with D.C. Bar Continuing Legal Education and
The Greater Washington Society of CPAs***



<p>3:00-4:00 ET 2:00-3:00 CT 1:00-2:00 MT 12:00-1:00 PT</p>	<p align="center">Influence of PACs on Capitol Hill and Capitol Hill Update</p> <p align="center">Phil Hackney, Associate Professor of Law, University of Pittsburgh Betsy Grossman, Trister, Ross, Schadler & Gold</p> <p align="center">Moderator: Alexander L. Reid, BakerHostetler</p>
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Friday, March 3, 2023

<p>10:00-10:05 ET 9:00-9:05 CT 8:00-8:05 MT 7:00-7:05 PT</p>	<p align="center">Initial Comments</p> <p align="center">Danika H. Mendrygal, Mendrygal Law, PLLC</p>
<p>10:05-11:35 ET 9:05-10:35 CT 8:05-9:35 MT 7:05-8:35 PT</p>	<p align="center">IRS Exempt Organization Update and Q&A</p> <p align="center">Robert Malone, Director of Exempt Organizations and Government Entities, IRS Timothy Berger, Senior Technical Advisor to the Director, Exempt Organizations, IRS</p> <p align="center">Moderators: Preston Quesenberry, KPMG Anne Fulton, Deloitte</p>
<p>11:35-12:35 ET 10:35-11:35 CT 9:35-10:35 MT 8:35-9:35 PT</p>	<p align="center">IRS Chief Counsel and Treasury Update</p> <p align="center">Rachel Leiser Levy, Associate Chief Counsel, EEE/EOET, IRS Lynne A. Camillo, Deputy Associate Chief Counsel, EEE/EOET, IRS Seth J. Groman, IRS Chief Counsel, General Attorney, Tax Casey Lothamer, Area Counsel (Mid-Atlantic), IRS, Office of Division Counsel (TEGEDC) Amber Mackenzie, Attorney Advisor, US Department of Treasury <i>(Invited)</i></p> <p align="center">Moderator: Ruth Madrigal, KPMG</p>
<p>12:35-1:00 ET 11:35-12:00 CT 10:35-11:00 MT 9:35-10:00 PT</p>	<p align="center">Break</p>
<p>1:00-2:30 ET 12:00-1:30 CT 11:00-12:30 MT 10:00-11:30 PT</p>	<p align="center">Private Foundation/DAFs</p> <p align="center">Maura Whelan, Simpson, Thacher & Bartlett Chelsea Rubin, Morgan Lewis Elinor Ramey, Steptoe & Johnson LLP Amber Mackenzie, Attorney Advisor, US Department of Treasury <i>(Invited)</i></p>
<p>2:30-3:30 ET 1:30-2:30 CT 12:30-1:30 MT 11:30-12:30 PT</p>	<p align="center">IRS Examinations Update</p> <p align="center">Gerald Griffith, Jones Day Fran McKenna, Retired EO Exam Manager, IRS <i>(Invited)</i></p> <p align="center">Moderator: Stephen M. Clarke, Ernst & Young LLP</p>

3:30-4:30 ET 2:30-3:30 CT 1:30-2:30 MT 12:30-1:30 PT	<p style="text-align: center;">International Activities Tax and Non-Tax Considerations for Foreign Activities</p> <p style="text-align: center;">Neelu Mehrotra, Ernst & Young, LLP Jennifer Richter, Ernst & Young, LLP</p> <p style="text-align: center;">Moderator: Andrea T. Al-Attar, Esq., The Law Office of Andrea T. Al-Attar, P.C.</p>
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Title Name: Exempt Organization Update – March 2 and 3, 2023

Date & Time: See above agenda.

Time: 630 minutes.

Recommended CPE: 10.5 credit hours.

Recommended CLE: 10.5 credit hours.

Delivery Method: Group Internet Based

Field of Study: Taxes.

Total Price: \$250, depending on date. For more information regarding refunds and cancellation policies, please contact 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 [TEGE Exempt Organizations Council - TIC TAQ Comments Submission \(eocouncil.org\)](#).

Prerequisites: None.

Program Level: Overview.

Delivery Method: Group Internet Based.