



Exempt Organizations Update – Thursday and Friday, March 7-8, 2024

Live in D.C.

Thursday, March 7, 2024

11:00-11:10 ET	<p align="center">Welcome/Initial Comments</p> <p align="center">Danika H. Mendrygal, Chair</p>
11:10-12:40 ET	<p align="center">IRS Exempt Organization Update and Q&A</p> <p align="center">Robert Malone, Director of Exempt Organizations and Government Entities, IRS John Montague, Acting Senior Technical Advisor to the Director, Exempt Organizations, IRS</p> <p align="center">Moderators: Preston Quesenberry, KPMG Anne Fulton, Deloitte Jennifer Becker Harris, Clark Nuber</p>
12:40 – 12:55 ET	<p align="center">Lunch Break</p>
12:55 – 1:10 ET	<p align="center">EO’s & the IRS’s Strategic Operating Plan</p> <p align="center">Eve Borenstein, Harmon Curran</p>
1:10-1:15 ET	<p align="center">Break</p>
1:15-2:15 ET	<p align="center">501(c)(3)s’ Navigation in Political Campaign Intervention Waters</p> <p align="center">Ezra Reese, Elias Law Renata Strause, Trister, Ross, Schadler & Gold, PLLC Charles (“Chip”) Watkins, Webster Chamberlain & Bean</p> <p align="center">Moderator: Zac Kester, Charitable Allies</p>
2:15-2:25 ET	<p align="center">Break</p>
2:25-3:25 ET	<p align="center">Public Support Test – Traps for the Unwary</p> <p align="center">Wendy Campos, Moss Adams Lisa Schaures, Seyfarth Shaw</p>
3:25-3:35 ET	<p align="center">Break</p>

3:35-4:35 ET	<p align="center">Lobbying, Campaign Activity and Private Benefit, Oh My! Pitfalls for Section 501(c)(3)s in their Relationships with Section 501(c)(4)s, 501(c)(6)s and 527's</p> <p align="center">Polly Federico, Sentara Health System Zac Kester, Charitable Allies</p> <p align="center">Moderator: Lauren Mack, Law Offices of Lauren Mack</p>
6:00 – 9:00 ET	<p align="center">Dinner/Reception Sponsored by GWSCPA <i>(Additional Registration and Payment Required)</i></p> <p>We invite you to join us at The City Club, located at 555 13th Street NW Washington, DC, 20004, at 6 p.m. on Thursday, March 7 for our annual reception and dinner. Your separate dinner reservation ticket includes a buffet dinner and 1 drink ticket. A Cash Bar will be available.</p>

Friday, March 8, 2024

8:00 – 8:05 ET	<p align="center">Initial Comments</p> <p align="center">Danika H. Mendrygal, Chair</p>
8:05 – 9:05 ET	<p align="center">UBIT Feels like a Four-Letter Word</p> <p align="center">Stephanie Robbins, Harmon Curran Laura Kenney, CLA</p> <p align="center">Moderator: Preston Quesenberry, KPMG</p>
9:05 – 9:15 ET	<p align="center">Break</p>
9:15-10:45 ET	<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 Christopher Hyde, Attorney, Office of Chief Counsel, IRS Casey Lothamer, Area Counsel (Mid-Atlantic), IRS, Office of Division Counsel (TEGEDC)</p> <p align="center">Moderator: Meghan Biss, Caplin & Drysdale</p>
10:45-10:55 ET	<p align="center">Break</p>
10:55-11:55 ET	<p align="center">State Regulation of Charitable Organizations</p> <p align="center">Elizabeth Kim, Senior Assistant Attorney General at California Department of Justice Beth Short, Charitable Outreach Supervisor, Ohio Attorney General</p> <p align="center">Moderator: Greg Lam, Copilevitz, Lam & Raney, LLC</p>
11:55 – 12:25 ET	<p align="center">Lunch Break</p>

12:25 – 1:25 ET	<p align="center">Circular 230: Professional Responsibilities in Today's Tax Practice</p> <p align="center">Elizabeth Kastenberg, Deputy Director/Senior Manager of the Office of Professional Responsibility, IRS Jacqueline Manasterli, Supervisory Legal Specialist, Legal Analysis Branch, Office of Professional Responsibility, IRS</p> <p align="center">Moderator: Chelsea Rubin, Morgan Lewis</p>
1:25 – 1:35 ET	<p align="center">Break</p>
1:35 – 2:35 ET	<p align="center">Donor Advised Funds – Proposed Regulations and Comments</p> <p align="center">Roger Colinvau, Columbus School of Law, Catholic University Geoff Green, CalNonprofits Darryll Jones, Florida A&M University College of Law Ward Thomas, IRS Chief Council EEE (invited)</p> <p align="center">Moderator: Alex Reid, Baker Hostetler</p>
2:35 – 2:45 ET	<p align="center">Wrap Up/Closing Remarks</p> <p align="center">Danika H. Mendrygal, Chair</p>

Title Name: Exempt Organization Update – March 7 and 8, 2024

Date & Time: See above agenda.

Time: 630 minutes.

Recommended CPE: 10.0 credit hours

Recommended CLE: 10.0 credit hours.

Delivery Method: Group In-Person

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 \(ecouncil.org\)](https://www.ecouncil.org/taq/).

Prerequisites: None

Program Level: Overview