



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 <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 Preston Quesenberry, KPMG</p> <p align="center">Moderator: Meghan Biss, Caplin & Drysdale</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 Amber Mackenzie, Attorney Advisor, US Department of Treasury Casey Lothamer, Area Counsel (Mid-Atlantic), IRS, Office of Division Counsel (TEGEDC)</p> <p align="center">Moderator: Elinor Ramey, Steptoe & Johnson</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 Leslie Friedlander, Assistant Attorney General, Charitable Trusts Section, Office of the Texas Attorney General, Consumer Protection Division 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	Lunch Break
12:25 – 1:25 ET	Circular 230: Professional Responsibilities in Today's Tax Practice 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 Moderator: Chelsea Rubin, Morgan Lewis
1:25 – 1:35 ET	Break
1:35 – 2:35 ET	Donor Advised Funds – Proposed Regulations and Comments Roger Colinvax, Columbus School of Law, Catholic University Geoff Green, CalNonprofits Darryll Jones, Florida A&M University College of Law Amber Mackenzie, Attorney Advisor, US Department of Treasury (invited) Moderator: Alex Reid, Baker Hostetler
2:35 – 2:45 ET	Wrap Up/Closing Remarks Danika H. Mendrygal, Chair

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 \(eocouncil.org\)](https://www.eocouncil.org/tic-taq-comments-submission).

Prerequisites: None

Program Level: Overview