EMPLOYEE BENEFITS SPRING UPDATE

AGENDA
(As of February 11b)

WEDNESDAY • April 1, 2020

9:20 – 9:50  REGISTRATION AND NETWORKING CONTINENTAL BREAKFAST (Non-CLE)

9:50-10:00  WELCOMING REMARKS (Non-CLE)
Co-Chairs: Emily S. Costin, Alston & Bird LLP
Jason P. Lacey, Foulston, Siefkin LLP
Alan Tawshunsky, Tawshunsky Law Firm PLLC

10:00-10:50  EXECUTIVE COMPENSATION UPDATE
This session will provide an in-depth explanation of the proposed regulations under section 162(m), as well as other current developments in executive compensation.
Moderator: Alan Tawshunsky, Tawshunsky Law Firm PLLC
Speakers: Robert J. Neis, Eversheds Sutherland (US) LLP
Stephen B. Tackney, Deputy Associate Chief Counsel (Employee Benefits), Employee Benefits, Exempt Organizations, and Employment Taxes, Office of Chief Counsel, Internal Revenue Service (Invited)

10:50-11:40  HOT TOPICS FOR HEALTH AND WELFARE PLANS
Moderator: Jason P. Lacey, Foulston, Siefkin LLP
Speakers: Kevin P. Knopf, Senior Technician Reviewer, Employee Benefits, Exempt Organizations, and Employment Taxes, Office of Chief Counsel, Internal Revenue Service (Invited)
Others TBD

11:40-12:30  ERISA LITIGATION UPDATE
Moderator: Emily S. Costin, Alston & Bird LLP
Speakers: Karen L. Handorf, Cohen Milstein
George Sepsakos, Groom Law Group
Wendy K. Von Wald, Travelers Insurance Company

12:30-1:10  LUNCH (Non-CLE)

1:10-2:40  QUALIFIED PLANS UPDATE
Experienced government and private sector speakers will provide insights on the key provisions of the SECURE Act, as well as the Labor Department’s proposed regulations on electronic disclosure and other current developments affecting qualified plans.
Moderator: Alan Tawshunsky, Tawshunsky Law Firm PLLC
Speakers: Jason E. Levine, Senior Technician Reviewer, Qualified Plans Branch 4, Employee Benefits, Exempt Organizations, and Employment Taxes, Office of Associate Chief Counsel, Internal Revenue Service (Invited)
Linda S. Marshall, Senior Counsel, Qualified Plans Branch 1, Employee Benefits, Exempt Organizations, and Employment Taxes, Office of Chief Counsel, Internal Revenue Service (Invited)
Veena K. Murthy, Crowe LLP
Ronald J. Rutherford-Triche, Branch Chief, Qualified Plans Branch 2, Employee Benefits, Exempt Organizations, and Employment Taxes, Office of Associate Chief Counsel, Internal Revenue Service (Invited)

2:40-3:30 DATA PRIVACY AND SECURITY
Moderator: Jason P. Lacey, Foulston Siefkin LLP

3:30-3:50 AFTERNOON BREAK (Non-CLE)

3:50-4:50 ATTORNEY-CLIENT PRIVILEGE AND THE FIDUCIARY EXCEPTION (Ethics Credit)
Moderator: Emily S. Costin, Alston & Bird LLP

4:50 ADJOURN

FACULTY

Emily S. Costin, Program Co-Chair, Alston & Bird LLP, Washington, DC

Karen L. Handorf, Cohen Milstein, Washington DC

Kevin P. Knopf, Senior Technician Reviewer, Office of Chief Counsel, (Employee Benefits, Exempt Organizations, and Employment Taxes), Health and Welfare Branch, Internal Revenue Service, Washington, DC (Invited)

Jason P. Lacey, Program Co-Chair, Foulston, Siefkin LLP, Wichita, KS

Jason E. Levine, Senior Technician Reviewer, Qualified Plans Branch 4, Employee Benefits, Exempt Organizations, and Employment Taxes, Office of Associate Chief Counsel, Internal Revenue Service, Washington, DC (Invited)

Linda S. Marshall, Senior Counsel, Qualified Plans Branch 1, Employee Benefits, Exempt Organizations, and Employment Taxes, Office of Chief Counsel, Internal Revenue Service, Washington, DC (Invited)

Veena K. Murthy, Crowe LLP, Washington, DC

Robert J. Neis, Eversheds Sutherland (US) LLP, Washington, DC

Ronald J. Rutherford-Triche, Branch Chief, Qualified Plans Branch 2, Employee Benefits, Exempt Organizations, and Employment Taxes, Office of Associate Chief Counsel, Internal Revenue Service, Washington, DC (Invited)

George Sepsakos, Groom Law Group, Washington, DC
Stephen Tackney, Deputy Associate Chief Counsel (Employee Benefits), Employee Benefits, Exempt Organizations, and Employment Taxes, Office of Chief Counsel, Internal Revenue Service, Washington, DC (Invited)

Alan Tawshunsky, Program Co-Chair, Tawshunsky Law Firm PLLC, Washington, DC

Wendy K. Von Wald, Travelers Insurance Company, Denver, CO