

Advance Registration & Prepayment Online Required By Noon On July 6, 2011

**GULF COAST AREA TEGE COUNCIL
EMPLOYEE BENEFITS & EXEMPT ORGANIZATIONS
ENFORCEMENT & COMPLIANCE
SUMMER 2011 MEETING
JULY 11, 2011
8:00 AM—3:30 PM
JAMES M. COLLINS CENTER FOR EXECUTIVE EDUCATION AT
SOUTHERN METHODIST UNIVERSITY**

[Register Here](#)

**REGISTER SEPARATELY FOR OPTIONAL JULY 10, 2011
PRE-CONFERENCE NETWORKING DINNER ON SUNDAY, JULY 10, 2011 [HERE](#))**

The Gulf Coast Area TEGE Council invites employee benefits and exempt organizations leaders, board members and trustees, and practitioners to catch up on key tax and other emerging regulatory and enforcement challenges from IRS, Labor Department and other industry leaders including:

Conference Covers Key Employee Benefits & Exempt Organizations Topics

- ERISA Fiduciary Disclosure
- Welfare Plan Audits & Enforcement
- Employee Benefit Plan Tax Qualification & Compliance In Mergers & Acquisitions
- IRS Exempt Organization Issues Update On Exemption & PLR Application Process, 501(c)(3) Joint Ventures With For Profits, & Group Exemptions & Group Returns
- Health Care Reform Regulatory Update
- Exempt Organization Board Governance Regulation, Enforcement & Best Practices
- EPCRS, 403(B), 457(F) Other New Developments Impacting Exempt Organization Plans

Hear From Prominent Government Speakers

- Lou Campagna, Division Chief, Office of Regulations Employee Benefit Security Administration Division of Fiduciary
- Jeffrey Turner, Acting Deputy Director, Employee Benefit Security Administration
- Paul Harger, Criminal Coordinator, Employee Benefit Security Administration Dallas Office
- Betty Clary, Associate Chief Council, Internal Revenue Service Office of Division Counsel*
- Tom Petit, Acting Area Manager, EP Gulf Coast Internal Revenue Service
- Lawrence M. Brauer, Former Senior Tax Law Specialist, Internal Revenue Service Exempt Organizations Division
- Kevin Knopf, Attorney-Advisor, Office of Benefits Tax Counsel, Office of Tax Policy, Internal Revenue Service
- George Patterson, Gulf States EP Voluntary Compliance Coordinator, Internal Revenue Service

Conference Registration Fee \$100 Per Person

Advance Registration Required. Register for Conference Online [Here](#) By Noon On July 6, 2011.
Conference Registrations Non-Refundable After Noon On July 6, 2011

Register for Optional Pre-Conference Networking Dinner [Here](#) By Noon on July 6, 2011.
Registration for Optional Pre-Conference Networking Dinner Non-Refundable After Noon On July 6, 2011

**Optional Pre-Conference Networking Reception & Dinner
Sunday, July 10, 2011
6:00—9:00 PM**

Lumen Kimpton Hotel Main Dining Room
Separate Pre-Paid Registration Required
Get More Details & Pre-Register [Here](#)

Save The Date & Plan To Attend The Fall Gulf Coast TEGE Council Meeting In Tampa on October 28, 2011.

**Advance
Registration &
Prepayment Online
Required By
July 6, 2011**

**Conference
Location**

**James M. Collins Center
For Executive Education**
Southern Methodist University
3150 Binkley Avenue
Suite 303
Dallas, Texas

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**For Website Registration
or Payment Issues Or
Questions, E-Mail [Here](#)**

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**For Other Additional
Information Or
Questions, E-Mail [Here](#)**

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Update Your Contact
Information, E-Mail Your
Request [Here](#)

**GULF COAST AREA TEGE COUNCIL
EMPLOYEE BENEFITS & EXEMPT ORGANIZATIONS
ENFORCEMENT & COMPLIANCE
SUMMER 2011 MEETING
July 11, 2011
MEETING AGENDA**

Optional Pre-Event Networking Dinner

Sunday, July 10, 2010

6:00-9:30 PM

LUMEN KIMPTON HOTEL
(Separate Advance Pre-Paid Registration Required)
Register & Get Details [Here](#)

8:00-8:30 am	Registration & Continental Breakfast	
8:35-9:35 am	ERISA Fiduciary Disclosure Lou Campagna <i>Division Chief, Office of Regulations Employee Benefit Security Administration Division of Fiduciary</i> Jeffrey Turner <i>Acting Deputy Director, Employee Benefit Security Administration</i> <i>Moderator: Tim Brechtel, Partner, Jones Walker</i>	
9:35-10:35 am	Welfare Plan Audits & Enforcement Paul Harger <i>Criminal Coordinator, Employee Benefit Security Administration Dallas Office</i> Betty Clary* <i>Associate Chief Council, Internal Revenue Service Office of Division Counsel*</i> Moderators: Kenneth R. Garner, <i>Executive Director, Tax, Ernst & Young LLP</i> Cynthia Marcotte Stamer, <i>Shareholder, Cynthia Marcotte Stamer PC</i>	
10:35- 10:45 am	Break	
10:45-11:45 am	Employee Benefit Plan Tax Qualification & Compliance In Mergers & Acquisitions Tom Petit <i>Acting Area Manager, EP Gulf Coast, Internal Revenue Service</i> Judy K. Mesecher <i>Director of Retirement Benefits Clear Channel Communications, Inc.</i> Moderator: Jim Griffin <i>Partner, Jackson Walker LLP</i>	IRS Exempt Organization Issues Update: EO Exemption & PLR Application Process Group Returns Lawrence M. Brauer <i>Former Senior Tax Law Specialist Internal Revenue Service Exempt Organizations Division</i> Moderator: Kathy Pitts <i>Executive Director, Ernst & Young LLP</i>
11:45 am– 1:00 pm	Lunch & Business Meeting	
1:00-2:00 pm	Health Care Reform Regulatory Update Kevin Knopf <i>Attorney-Advisor Office of Benefits Tax Counsel, Office of Tax Policy, Internal Revenue Service</i> Moderator: Misty A Leon <i>Counsel, Step toe & Johnson</i>	Exempt Organization Board Governance Regulation, Enforcement & Best Practices Nancy Z. Evetts <i>Director, Deloitte Tax LLP</i> Steve Love <i>President & Chief Executive Officer, DFW Hospital Council</i> Shelley Koltnow <i>VP of Corporate Responsibility, Via Christi Health</i>
2:00– 2:10 pm	Break	
2:10-3:10 pm	EPCRS, 403(B), 457(F) Other New Developments Impacting Exempt Organization Plans George Patterson <i>Gulf States EP Voluntary Compliance Coordinator, Internal Revenue Service</i> <i>Moderator Mary Steichen, Of Counsel, McAfee & Taft</i>	
3:10-3:30 pm	Fireside Chat & Adjournment	

**Invited, Not Yet Confirmed. Speakers and agenda subject to change.*

**PARTICIPANTS IN THE
JULY 11, 2011
GULF COAST AREA TEGE COUNCIL
EMPLOYEE BENEFITS & EXEMPT ORGANIZATIONS
ENFORCEMENT & COMPLIANCE MEETING
ARE INVITED TO REGISTER FOR AN
OPTIONAL PRE-EVENT NETWORKING
RECEPTION & DINNER
SUNDAY, JULY 10, 2011
DUTCH TREAT HAPPY HOUR 6:00–7:00 PM
DINNER 7:00-9:30 PM
LUMEN KIMPTON HOTEL MAIN DINING ROOM
\$48.00/PP (WINE SOLD SEPARATELY)
(SEPARATE ADVANCE PRE-PAID REGISTRATION REQUIRED)**

To Register, Make Payment [Here](#)

AND

**Complete & Return The Following Pre-Order Form
By Noon On July 6, 2011**

Via E-mail To [TEGE Pre-Event Dinner Selections](#)

Or

Via Fax To (469) 814-8382

Appetizers (available during cocktail hour 6:00pm-7:00pm)

Blue cheese potato chips
Tortilla chips with Red and Green Salsas
Wine Sold Separately For A Separate Charge

Dinner menu

Starters: (choose between)

_____ Southwestern corn chowder or
_____ Caesar salad

Main course: (*choice between*)

_____ Pan Seared Chicken Breast with Natural Pan Jus
_____ Beef Brisket with Dr. Pepper Ancho Chile BBQ sauce
_____ Grilled Salmon with Pico de Gallo and Lemon Caper Sauce
_____ Vegetarian option

Sides: (accompanying each dinner)

Yukon Gold Whipped Potatoes and Vegetable Medley

Dessert:

Warm blueberry bread pudding with Honey Bourbon Cream

Print Name: _____

Signature: _____