



2025 Conference on Representing & Managing Tax-Exempt Organizations Agenda

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2025 Conference on Representing & Managing Tax-Exempt Organizations

Day 1: Thursday, April 24

Registration & Breakfast

7:30 a.m. – 8:15 a.m., Promenade Foyer

Welcome & Introduction

8:15 a.m. – 8:25 a.m., Grand Ballroom + Chinese Ballroom (Overflow: East Ballroom)

Celia Roady, Morgan, Lewis & Bockius LLP

Office of the IRS Director, Exempt Organizations: Practitioner's Perspective

8:30 a.m. – 9:00 a.m., Grand Ballroom + Chinese Ballroom (Overflow: East Ballroom)

Not eligible for CLE or CPE credit

Timothy Berger, Caplin & Drysdale

Current Developments at the Treasury and IRS: Practitioners' Perspective

9:05 a.m. – 10:05 a.m., Grand Ballroom + Chinese Ballroom (Overflow: East Ballroom)

Michael Desmond, Miller & Chevalier Chartered

Rachel Leiser Levy, former Associate Chief Counsel, EEOC

Alexander Reid, BakerHostetler LLP

Networking Break

10:05 a.m. – 10:20 a.m., Promenade Foyer

Thank you to our networking break sponsor, KPMG!

Capitol Hill Update: What Are Members and Staffers Focusing on in 2025?

10:20 a.m. – 11:20 a.m., Grand Ballroom + Chinese Ballroom (Overflow: East Ballroom)



Ann Cammack, Senate Finance Committee
Andrew Grossman, House Committee on Ways and Means
Andrew Lai, Joint Committee on Taxation
Jesse Mahan, U.S. Senate
Alexander Reid, BakerHostetler LLP

Bruce Hopkins Memorial Update on Key Current Developments

11:25 a.m. – 12:25 p.m., Grand Ballroom + Chinese Ballroom (Overflow: East Ballroom)

Rosemary Fei, Adler & Colvin
Diara Holmes, Loeb & Loeb

Lunch (on your own)

12:25 p.m. – 1:45 p.m.

CONCURRENT SESSIONS

Breakout Room 1: State AG Update and Federalism in State Charities Regulation

1:45 p.m. – 3:00 p.m., Grand Ballroom

Cindy M. Lott, Indiana University
Beth Short, Ohio Attorney General's Office
Cara Spencer, Office of the Attorney General for the District of Columbia

Breakout Room 2: What Exempt Organizations Need to Know About AI in 2025

1:45 p.m. – 3:00 p.m., Palm Court Ballroom

Adam Crenshaw, Gates Foundation
William Smith, Ai2
Sandy Yao, Chan Zuckerberg Biohub Network



Breakout Room 3: Lifecycle of an IRS Audit: Practitioners Demystify the IRS Audit Process

1:45 p.m. – 3:00 p.m., East Ballroom

Alexandra Mitchell, RSM US LLP

Preston Quesenberry, KPMG

Celia Roady, Morgan, Lewis & Bockius LLP

Networking Break

3:00 p.m. – 3:10 p.m., Promenade Foyer

CONCURRENT SESSIONS

Breakout Room 1: Racial Justice in the Current Environment

3:10 p.m. – 4:25 p.m., Grand Ballroom

Emily DeSmedt, Morgan, Lewis & Bockius LLP

Martha Jimenez, The California Endowment

John Tyler, Ewing Marion Kauffman Foundation

Breakout Room 2: Charitable Diversions

3:10 p.m. – 4:25 p.m., Palm Court Ballroom

Ryan Murphy, PricewaterhouseCoopers

Frank Trinity, Association of American Medical Colleges

Maura Whelan, Simpson Thacher & Bartlett LLP

Breakout Room 3: Legal, Tax and Reporting Issues Related to Investments Owned by Public Charities and Private Foundations

3:10 p.m. – 4:25 p.m., East Ballroom

Jane Searing, Deloitte Tax LLP

David Shevlin, Simpson Thacher & Bartlett LLP



CONCURRENT SESSIONS

Breakout Room 1: Impact Investing Update: Trends and Challenges

4:30 p.m. – 5:30 p.m., Grand Ballroom

Bob Cooney, Local Initiatives Support Corp

Tomer Inbar, Morgan, Lewis & Bockius LLP

Ken Miller, Gates Foundation

Miranda Lindl O'Connell, Builders Vision

Breakout Room 2: Strategic Use of 501(c)(3)/(4) Organizations

4:30 p.m. – 5:30 p.m., Palm Court Ballroom

Nancy McGlamery, Adler & Colvin

Amanda Reed, Caplin & Drysdale

Breakout Room 3: Ask the Experts

4:30 p.m. – 5:30 p.m., Chinese Ballroom

Not eligible for CLE or CPE credit

David Shevlin, Simpson Thacher & Bartlett LLP

Robert Wexler, Adler & Colvin

LaVerne Woods, Davis Wright Tremaine LLP

Networking Cocktail Reception

5:30 p.m. – 6:30 p.m., State Ballroom

Thank you to our reception sponsor, Morgan Lewis!



2025 Conference on Representing & Managing Tax-Exempt Organizations

Day 2: Friday, April 25

Continental Breakfast

7:30 a.m. – 8:00 a.m., Promenade Foyer

CONCURRENT SESSIONS

Breakout Room 1: UBIT Update and Case Studies

8:00 a.m. – 9:00 a.m., Grand Ballroom + Chinese Ballroom

Jonathan Blum, Holland & Knight LLP

Shira Helstrom, ArentFox Schiff LLP

Breakout Room 2: Legal and Tax Considerations with Single Member LLCs

8:00 a.m. – 9:00 a.m., Palm Court Ballroom

Stephanie Biden, Bates Wells

James P. Joseph, Arnold & Porter

Jenna Ventrino, WilmerHale

Breakout Room 3: Church Tax Update

8:00 a.m. – 9:00 a.m., East Ballroom

April Davenport, Presbyterian Church of the United States

Heather Kimmel, United Church of Christ

Leticia Mayberry Wright, United Methodist Church



CONCURRENT SESSIONS

Breakout Room 1: A Look Inside Treasury and IRS Chief Counsel

9:05 a.m. – 10:05 a.m., Grand Ballroom + Chinese Ballroom

Meghan Biss, Loeb & Loeb

Ruth Madrigal, KPMG

Chelsea Rubin, Internal Revenue Service

Breakout Room 2: Structuring and Defining Responsibilities of Nonprofit Board Committees for Good Governance, in Times of Crisis and Beyond

9:05 a.m. – 10:05 a.m., Palm Court Ballroom

Megan Bell, Morgan, Lewis & Bockius LLP

Maureen Lawrence, El Pomar Foundation

Joshua Mintz, MacArthur Foundation

Breakout Room 3: Grants vs. Contracts: Key Legal, Tax and Reporting Issues

9:05 a.m. – 10:05 a.m., East Ballroom

Jillian Diamant, Pivotal Ventures

Erica Guyer, Rockefeller Foundation

Jennifer Shipp, Heising-Simons Foundation

Networking Break

10:05 a.m. – 10:15 a.m., Promenade Foyer



CONCURRENT SESSIONS

Breakout Room 1: IRS Audit Update

10:15 a.m. – 11:30 a.m., Grand Ballroom + Chinese Ballroom

Rob Friz, PricewaterhouseCoopers

Alexandra Mitchell, RSM US LLP

Preston Quesenberry, KPMG

Breakout Room 2: Current Issues in Executive Compensation for Charities and Foundations

10:15 a.m. – 11:30 a.m., Palm Court Ballroom

Ann Batlle, Morgan, Lewis & Bockius LLP

Hali Croner, Croner Company

James Wynn, Quatt Associates

Breakout Room 3: What Charities Need to Know about Enterprise Risk Management

10:15 a.m. – 11:30 a.m., East Ballroom

Sasha Abrams, Gordon and Betty Moore Foundation

Nishka Chandrasoma, Ford Foundation

Elizabeth Peters, Hewlett Foundation

Box Lunch

11:30 a.m. – 12:15 p.m., Promenade Foyer

CONCURRENT SESSIONS

Breakout Room 1: Legal Ethics for EO Counsel

12:20 p.m. – 1:20 p.m., Grand Ballroom + Chinese Ballroom

Ofer Lion, Seyfarth Shaw

LaVerne Woods, Davis Wright Tremaine LLP



Breakout Room 2: Update on Donor-Advised Funds

12:20 p.m. – 1:20 p.m., Palm Court Ballroom

Ed Chaney, Schell Bray

Caroline Waldner, Morgan, Lewis & Bockius LLP

Breakout Room 3: Current Trends in Union Organizing at Charitable Organizations

12:20 p.m. – 1:20 p.m., East Ballroom

David Broderdorf, Morgan, Lewis & Bockius LLP

Lauren McDermott, Mooney Green Saindon Murphy & Welch P.C.

CONCURRENT SESSIONS

Breakout Room 1: International Grantmaking for Charities and Foundations

1:25 p.m. – 2:25 p.m., Grand Ballroom + Chinese Ballroom

Damon James, The David & Lucile Packard Foundation

Sharon Nokes, Pew Charitable Trusts

Kelly Simone, Robert Wood Johnson Foundation

Breakout Room 2: Creative Uses and Challenging Issues with Supporting Organizations

1:25 p.m. – 2:25 p.m., Palm Court Ballroom

Robin Krause, Patterson Belknap Webb & Tyler

Elinor Ramey, Lowenstein Sandler LLP

Breakout Room 3: 990, 990-T and 990-PF Update

1:25 p.m. – 2:25 p.m., East Ballroom

Stephen Clarke, Ernst & Young LLP

Joanne Krueger, PricewaterhouseCoopers

Ray Ly, KPMG

Rachel Spurlock, Crowe LLP



Networking Break

2:25 p.m. – 2:40 p.m., Promenade Foyer

CONCURRENT SESSIONS

Breakout Room 1: Federal and State Lobbying Rules for Charities and Private Foundations

2:40 p.m. – 3:55 p.m., Grand Ballroom + Chinese Ballroom

Kristen Gurdin, Wellspring Philanthropic Fund

Katherine Karl, Caplin & Drysdale

Breakout Room 2: Challenging Issues with Fiscal Sponsorships and Intermediaries

2:40 p.m. – 3:55 p.m., Palm Court Ballroom

Kimberly Eney, Loeb & Loeb

Emily Friedman, MacArthur Foundation

Vanessa Goodwin, Heising-Simons Foundation

Breakout Room 3: General Counsel Update

2:40 p.m. – 3:55 p.m., East Ballroom

Not eligible for CLE or CPE credit

Kenneth Austin, Trinity Church Wall Street

Maureen Lawrence, El Pomar Foundation

Joshua Mintz, MacArthur Foundation

CONCURRENT SESSIONS

Breakout Room 1: Employee Benefits Update

4:00 p.m. – 5:00 p.m., Grand Ballroom + Chinese Ballroom

Chris Lowther, Howard Hughes Medical Institute

Erin Randolph-Williams, Morgan, Lewis & Bockius LLP



Breakout Room 2: IRS Form 1023: Everything You Need to Know about Applying for Exemption

4:00 p.m. – 5:00 p.m., Palm Court Ballroom (Overflow: East Ballroom)

Allison Heimann, Morgan, Lewis & Bockius LLP

Carrie Garber Siegrist, Goodwin Procter LLP