Are you ready for real-time payments, cryptocurrency transactions, and the effects of presidential politics on your payroll?

March 16-17
Omni Shoreham Hotel
Washington, D.C.
## MONDAY, MARCH 16

- **7:00 a.m. – 8:00 a.m.**
  Registration and Continental Breakfast
- **8:00 a.m. – 8:15 a.m.**
  Welcome
- **8:15 a.m. – 9:45 a.m.**
  What’s New at the IRS?
- **9:45 a.m. – 10:00 a.m.**
  Break
- **10:00 a.m. – 11:00 a.m.**
  What’s New in Wage and Hour?
- **11:00 a.m. – 12:00 p.m.**
  Real Time Payments and Payroll Implications
- **12:00 p.m. – 1:30 p.m.**
  Lunch
- **1:45 p.m. – 2:45 p.m.**
  Cryptocurrency for Payroll
- **2:45 p.m. – 3:45 p.m.**
  Issues in Early Wage Access
- **3:45 p.m. – 4:00 p.m.**
  Break
- **4:00 p.m. – 5:30 p.m.**
  IRS Advisory Committees: An Update
- **5:30 p.m. – 6:30 p.m.**
  Cocktail Reception

## TUESDAY, MARCH 17

- **7:30 a.m. – 8:00 a.m.**
  Continental Breakfast
- **8:00 a.m. – 9:30 a.m.**
  State Issues
- **9:30 a.m. – 9:45 a.m.**
  Break
- **9:45 a.m. – 10:45 a.m.**
  What’s New at the SSA?
- **10:45 a.m. – 11:45 a.m.**
  What’s New in Employment Verification?
- **11:45 a.m. – 12:45 p.m.**
  Networking Lunch
- **12:45 p.m. – 1:45 p.m.**
  Government Oversight in the Payroll Space
- **1:45 p.m. – 2:45 p.m.**
  What’s New in Child Support?
- **2:45 p.m. – 3:45 p.m.**
  Effect of Presidential Politics on Payroll
- **3:45 p.m.**
  Closing and Door Prizes
MONDAY, MARCH 16

8:00 a.m. – 8:15 a.m.
Welcome
William Dunn, CPP
Director, Government Relations
American Payroll Association
Alice Jacobsohn, Esq.
Sr. Manager, Government Relations
American Payroll Association

8:15 a.m. – 9:45 a.m.
What's New at the IRS?
FOS: Taxes/1.5 CPE Credits/1.5 RCHs
Dan Lauer
Director, Examination Operations and Specialty Tax
Internal Revenue Service
With a range of topics on implementing the Tax Cuts and Jobs Act, considerations under the Taxpayer First Act, addressing the gig economy, enforcement, phishing schemes, and more, presenters from the IRS will share their insights.

10:00 a.m. – 11:00 a.m.
What's New in Wage and Hour?
FOS: Business Law/1.0 CPE Credit/1.0 RCH
Cheryl Stanton, Esq.
Administrator
Wage and Hour Division
U.S. Department of Labor
Learn about the regulatory and enforcement priorities of the Wage and Hour Division (WHD), strategic enforcement in the workplace, the agency's outreach initiatives, and opportunities to engage with WHD to help lift compliance behavior in the regulated community.

11:00 a.m. – 12:00 p.m.
Real Time Payments and Payroll Implications
FOS: Finance/1.0 CPE Credit/1.0 RCH
William Sullivan
Sr. Director and Group Manager, Government and Industry Relations
Nacha
Tim Boike
Vice President, Industry Relations
Federal Reserve Bank of Chicago
Real-time payment proponents claim they can help eliminate overdraft fees and limit the need for payday loans and check cashing services. How will businesses balance speed against the cost and the risk of fraud? Join us to learn what is driving this newest development in payments from banking and legislative perspectives and explore impacts such as financial literacy and financial inclusion.

12:00 p.m. – 1:30 p.m.
Lunch

1:45 p.m. – 2:45 p.m.
Issues in Early Wage Access
FOS: Business Law/1.0 CPE Credit/1.0 RCH
Lauren Saunders, Esq.
Associate Director
National Consumer Law Center
Donna Gettings, CPP
Vice President of Quality
Adams Keegan, Inc.
Early wage access, often referred to as on-demand pay, is trending with employees wanting their pay sooner than their regular paychecks. New service providers and offerings have emerged that serve to facilitate early access to earned wages using a variety of management options. In this session, presenters will offer their perspectives on the benefits and concerns raised by on-demand pay.

2:45 p.m. – 3:45 p.m.
Perspectives From the Taxpayer Advocate’s Office
FOS: Taxes/1.0 CPE Credit/1.0 RCH
Bridget Roberts, Esq.
Acting National Taxpayer Advocate
Office of the National Taxpayer Advocate
Internal Revenue Service
The National Taxpayer Advocate Service (TAS) is an independent organization within the IRS and the voice of taxpayers. The Taxpayer First Act enhanced the role of the taxpayer advocate to fulfill its mission of ensuring that every taxpayer is treated fairly. Learn directly from the TAS about its plans and perspectives on the IRS.

*Program and speakers subject to change without notice
4:00 p.m. – 5:30 p.m.
IRS Advisory Committees: An Update
FOS: Taxes/1.5 CPE Credits/1.5 RCHs

Luanne Brown, CPP
Director, Payroll Services
Grand Valley State University
Electronic Tax Administration Advisory Committee

Jim Paille, CPP
Director, Compliance
Thomson Reuters
IRS Advisory Council

Melvin Hardy
Director, National Public Liaison
Internal Revenue Service

APA has representatives on a number of IRS advisory committees. Through these committees payroll interests are shared with other participants and IRS employees with the goal of improving agency processes and regulations, preventing identity theft and tax fraud, and enhancing agency communication with businesses and individual taxpayers. A panel will discuss these advisory committees.

9:45 a.m. – 10:45 a.m.
What’s New at the SSA?
FOS: Taxes/1.0 CPE Credit/1.0 RCH

Scott Pedersen
Team Lead
Office of Electronic Services and Technology
Social Security Administration

Matthew Newton
Program Manager
Office of Electronic Services and Technology
Social Security Administration

Wage reporting requirements, including wage reporting redesign programs, the process to revise the social security wage base, electronic wage reporting, the SSA’s modernization project, and more will be discussed in this session.

10:45 a.m. – 11:45 a.m.
What’s New in Employment Verification?
FOS: Business Law/1.0 CPE Credit/1.0 RCH

Dave Basham
Form I-9 and E-Verify Speaker
Verification Division
U.S. Citizenship and Immigration Services
U.S. Department of Homeland Security

Alberto Ruisanchez, Esq.
Deputy Special Counsel
Immigrant and Employee Rights Section
Civil Rights Division
U.S. Department of Justice

Ensuring compliance with immigration-related employment verification is important, especially with the current increase in worksite investigations. Learn about the tools available to achieve and maintain compliance. Presenters also will discuss agency activities that impact employment verification, the pitfalls to avoid, and potential future changes.

TUESDAY, MARCH 17
8:00 a.m. – 9:30 a.m.
State Issues
FOS: Taxes/1.5 CPE Credits/1.5 RCHs

Pete Isberg
Vice President, Government Relations
ADP, LLC
Co-chair, Government Relations Task Force
Subcommittee on State and Local Topics

Carllanna Livingstone, CPP
Quality Assurance Engineer
CIC Plus
Co-chair, Government Relations Task Force
Subcommittee on State and Local Topics

Lia Coniglio, Esq.
Manager, State Payroll Information Resources
American Payroll Association

With the recent trend shifting legislative and regulatory action to states, payroll professionals are faced with changes to tax filing, wage and hour requirements, paid family and medical leave, retirement plans, and more. Presenters will discuss these changes and impacts on payroll management.
12:45 p.m. – 1:45 p.m.
Government Oversight in the Payroll Space
FOS: Taxes/1.0 CPE Credit/1.0 RCH

Alyssia Borsella
Senior Analyst, Strategic Issues
U.S. Government Accountability Office

Shannon Finnegan
Assistant Director, Strategic Issues
U.S. Government Accountability Office

In 2019, the GAO made several recommendations to the IRS regarding the oversight of third-party cybersecurity practices. Learn what was proposed, how the IRS reacted, and the implications for business and individual taxpayers.

1:45 p.m. – 2:45 p.m.
What’s New in Child Support?
FOS: Business Law/1.0 CPE Credit/1.0 RCH

Sherri Grigsby
Manager, Employer Services
Office of Child Support Enforcement
U.S. Department of Health and Human Services

Craig Burshem, Esq.
Deputy Commissioner of State Programs
Department of Social Services
Commonwealth of Virginia

Corrinne Flores
Director, Government Affairs - Wage Garnishments
ADP, LLC
Chair, Government Relations Task Force Subcommittee on Child Support and Other Garnishments

Employers work with state and federal child support enforcement to improve processes and increase withholding. Presenters will discuss collaborative efforts to address withholding from lump-sum payments, improve new hire reporting, verification of employment, medical support, and more.

2:45 p.m. – 3:45 p.m.
Effect of Presidential Politics on Payroll
FOS: Business Law/1.0 CPE Credit/1.0 RCH

Thaddeus Inge, Esq.
Manager, Government Relations
Paychex, Inc.

The president and key congressional positions are open for election in 2020. Depending on election results, positioning on issues impacting payroll may shift. Be ready for a spirited talk about the election and potential impacts.
1. **Registration**

   **Event code: 20SUMMIT**
   - I am an APA MEMBER, ID # ___________ $730
   - I am a COLLEAGUE of an APA Member (at the same street address) ________ $850

   Colleague’s ID #: ______________________
   Member’s Name: _______________________
   Member’s ID #: _______________________

   - I am not an APA Member or Colleague. ID # (if known) ________ $950
   - I would like to join APA now AND register at the member rate

   Capital Summit Registration Fee $730
   Annual Membership Dues* $258
   One-Time Enrollment Fee ________ $35
   "TOTAL ________ $1,023"

   **Join now and save $220 on your registration!**

2. **Registrant Information (please print)**

   **Registrant’s Primary Address**
   Name: Ms.  
   Organization: _______________________________
   Street Address: _____________________________
   City: ______________________________________
   State/Province: _____________________________ Country: ________
   Zip + 4-Digit/Postal Code: ____________________
   Phone: ___________________________ Fax: _______________________
   (Area/Country Code) __________________________ (Area/Country Code)
   Email: __________________________________________
   (For official APA communications, registration confirmations, Payroll Current, and PAYTECH-Digital)
   Please indicate if you are: ❑ CPA ❑ PA (For NASBA reporting purposes)

   **Needed for new member enrollment:**
   BIRTH DATE: ___________ / ___________ / ___________

   **Special Dietary Request:**
   ❑ Vegetarian ❑ Gluten-free ❑ Kosher ❑ Peanut Allergy ❑ Dairy Allergy
   ❑ Shellfish Allergy ❑ Vegan

   Special dietary requests received less than two weeks from event start cannot be guaranteed.

   **All Attendees Please Complete This Section.**
   In case of emergency, contact:
   Name: ___________________________________________
   Relation to Attendee: _______________________________
   Preferred Phone: _________________________________

   **Have you ever:**
   Purchased something from the APA? ❑ Yes ❑ No
   Had a membership with the APA? ❑ Yes ❑ No

   If yes, what name was it under? ___________________________________________
   What was the company name? ___________________________________________

3. **Payment Information**

   Payment in U.S. dollars must accompany registration form.
   Currency Converter: www.xe.com

   **Three Registration Options:**
   ❑ Online  ❑ Fax  ❑ Mail
   www.americanpayroll.org/summithtml  (210) 224-6038 To address below
   ❑ I authorize the API Fund for Payroll Education, Inc. to charge my:
     ❑ American Express ❑ Discover ❑ Mastercard ❑ Visa
     Card is: (check one) ❑ Corporate ❑ Personal
     Card #: ________________________________ CVV Code: _____________________
     Exp. Date: ____________________________
     Name on Credit Card: _________________________________
     Signature of Cardholder: _________________________________

   ❑ Purchase Order #: ________________________________ (for government agencies/universities only)
   ❑ Make CHECK payable and mail to:
     2020 Capital Summit | Registration Form
     1100 Spring Street, NW 
     Suite 400 
     Washington, DC 20005
     API Fund for Payroll Education, Inc.
     660 North Main Avenue, Suite 100 
     San Antonio, TX 78205-1217

   Email: apa@americanpayroll.org • Visit: www.americanpayroll.org
   Phone: (210) 224-6406 • M–F, 8 a.m.–6 p.m. CT
   To address below
   API Fund for Payroll Education, Inc.
   660 North Main Avenue, Suite 100
   San Antonio, TX 78205-1217

   Make CHECK payable and mail to:
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   San Antonio, TX 78205-1217

   *Dues are subject to change without notice and are nonrefundable.* Membership is on an individual basis; corporate memberships are not available. 100% of APA membership dues are deductible as an ordinary business expense.

   **Registration Fees:** Fees include two continental breakfasts, three breaks, two lunches, and one cocktail reception. Registration with payment in U.S. dollars must be received at least five business days in advance of the conference to guarantee your registration. If you have not received an email confirmation one week prior to the conference, please call APA at (210) 224-6406, M-F, 8 a.m.–6:00 p.m. CT, to confirm your registration. APA reserves the right to limit enrollment to ensure that published objectives will be achieved.

   **Dietary Requests and Special Services:** Dietary Requests made within two weeks from event start date cannot be guaranteed. By requesting a dietary meal and indicating the meal functions you will be attending, you confirm that you will be eating your dietary meal purchased by APA on your behalf. There is no additional charge for the dietary meal(s), unless you elect not to eat it, fail to pick up the dietary meal, or eat a regular attendee meal in its place. In any of these instances, you will be invoiced $50 for each dietary meal that you ordered. Dietary requests will be limited and will not be honored onsite.

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   **Hotel Accommodations:** APA has reserved a block of guest rooms at the Omni Shoreham Hotel, 2500 Calvert Street NW, Washington, DC 20008 at the rate of $289 single occupancy and $359 double occupancy, exclusive of appropriate state and local taxes. The special rates are available until Friday, February 21, 2020. Room reservations and hotel arrangements at the Omni Shoreham Hotel are the responsibility of the individual. To make a reservation, please visit https://bit.ly/2020CapSum-hotel. After February 21, 2020, room reservations will be accepted on a space-available basis and may be at the hotel’s prevailing rate. All reservations must be guaranteed by a valid major credit card, which will need to be supplied at the time of the reservation. Any guaranteed reservation not canceled 72 hours prior to arrival will be subject to one night room and tax cancellation fee. Check in time is 3:00 p.m.; check out time is 12:00 p.m.

   **Currency Converter:** www.xe.com
   Payment in U.S. dollars must accompany registration form.
   Payment Information
   Please indicate if you are: ❑ CPA ❑ PA (For NASBA reporting purposes)

   **I agree to the policies found at** bit.ly/APA-policies

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   **Last updated:** 2/2020