

Growing Your Business in the Self-Directed IRA Industry




Join RITA for our Spring virtual conference.

- Get the latest Legislative Intelligence Affecting Your Business
- Keep up with Regulatory Changes
- New Rules on Required Minimum Distributions
- Updates from the Department of Labor and Treasury Department
- Cryptocurrencies in IRAs

Tuesday, March 29, 2022

- 12:00 pm – 12:15 pm **Welcome:** Rich Immesberger, President, RITA
- 12:15 pm – 12:45 pm **Washington Update:** Michael Hadley, Partner, Davis & Harman LLP
- 12:45 pm – 1:00 pm *Sponsor Showcase* 
- 1:00 pm – 2:00 pm **Legislative Panel:** **Jamie Cummins**, Tax Counsel for Senate Finance Committee Minority Staff; **Michael Sinacore**, Economic Policy Adviser for Sen. Rob Portman (R-OH); **Payson Peabody**, Tax Counsel for House Ways and Means Committee Minority Staff; **Lori Prater**, Tax Counsel/Policy Director for Rep. Mike Kelly (R-PA); **Moderator: Chris Gaston**, Principal, Director of Government Relations, Davis & Harman LLP
- 2:00 pm – 2:15 pm *Sponsor Showcase* 
- 2:15 pm – 3:00 pm **The Latest Retirement Plan Research:** Sarah Holden, Senior Director, Retirement and Investor Research, Investment Company Institute
- 3:00 pm – 3:30 pm **New RMD Rules Unpacked:** Bryan Keene, Partner, Davis & Harman LLP
- 3:30 pm – 4:00 pm **Update on State IRAs:** Angela Antonelli, Research Professor and Executive Director, Center for Retirement Initiatives, Georgetown University's McCourt School of Public Policy
- 4:00 pm – 4:15 pm *Break*
- 4:15 pm – 5:00 pm **Industry Issues: Fair Market Value Updates; How to Deal with Stale Valuations from Clients on Alternative Assets; Private Debt; Promissory Notes**
- 5:00 pm – 5:15 pm *Sponsor Showcase* 
- 5:15 pm – 6:00 pm **RITA Regular Members Only Discussions**

Wednesday, March 30, 2022

12:00 pm – 12:30 pm	<u>RITA Update:</u> Mary Mohr, Executive Director
12:30 pm – 1:30 pm	<u>Cryptocurrencies:</u> Matthew Reynolds , Supervisory Special Agent, Economics Crime Unit, FBI; Allison Itami , Principal, Groom Law Group; Tobin McComas , Vice President, Development & Member Services, Chamber of Digital Commerce; John Denza , CCO, Eris X; Chris Blasi , CEO, Neptune-GBX, <u>Moderator:</u> Scott Schwartz , General Counsel, Delaware Depository
1:30 pm - 1:45 pm	<i>Sponsor Showcase</i>  & 
1:45 pm – 2:00 pm	<i>Break</i>
2:00 pm – 2:30 pm	<u>Update from the Treasury Department:</u> Carol Weiser, Benefits Tax Counsel, Department of the Treasury
2:30 pm – 2:45 pm	<i>Sponsor Showcase</i> 
2:45 pm – 3:15 pm	<u>Latest Developments from the Department of Labor:</u> Timothy Hauser, Deputy Assistant Secretary for Program Operations, Employee Benefits Security Administration
3:15 pm – 3:30 pm	<i>Sponsor Showcase</i> 
3:30 pm – 4:00pm	<u>Insights from the IRS:</u> Laura Warshawsky, Acting Deputy Associate Chief Counsel (Employee Benefits), IRS
4:00 pm – 4:45 pm	<u>Employee Retention Strategies:</u> Karyn DeFalco, Chief Human Resources Officer, Millennium Trust Company
4:45 pm – 5:30 pm	<u>Industry Issues:</u> The Role of Custodians & Third Parties
5:30 pm – 6:00 pm	<i>RITA Regular Members Only Discussions</i>

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