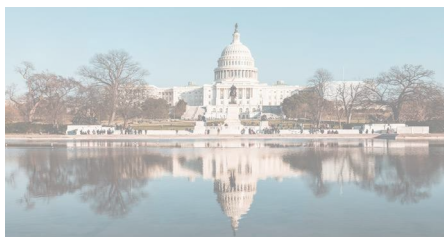


Leading the Way for Self-Directed IRAs



- * Details on the Mechanics of Trump Accounts from the Treasury Department
- * Updates on the Latest Fraud Schemes Impacting the Industry
- * Relevant Insights from the IRS
- * Interactive Roundtable Discussions on Navigating Common Industry Issues

Sunday, April 19, 2026

5:00 pm - 6:00 pm	New Conference Attendee Welcome	Location TBA
6:30 PM	RITA Board Meeting (Board Members only)	Kalorama

Monday, April 20, 2026

7:30 am - 9:00am	<i>Breakfast</i>	Doyle Bar
9:00 am – 9:15 am	Welcome: Barbara Van Zomeren, President, RITA	Dupont Ballroom
9:15 am – 10:00 am	Washington Update: Michael Hadley, Partner, Davis & Harman LLP	Dupont Ballroom
10:00 am – 10:45 am	Congressional Updates: Key Congressional Staff TBA; Moderator: Chris Gaston , Principal, Director of Government Relations, Davis & Harman LLP	Dupont Ballroom
10:45 am – 11:00 am	<i>Morning Break</i>	Dupont Ballroom
11:00 am – 11:30 am	Trump Accounts: Helen Morrison , Deputy Benefits Tax Counsel, Office of Tax Policy, Department of Treasury; Rob Daily , Attorney-Advisor, U.S. Department of Treasury, Office of Tax Policy; Ben Meiselman , Financial Economist at U.S. Department of the Treasury	Dupont Ballroom
11:30 am – 12:00 pm	Study on SDIRAs: Ava Kargosha, Analyst, Education, Workforce and Income Security, US Government Accountability Office (<i>invited</i>)	Dupont Ballroom
12:00 pm – 1:00 pm	<i>Lunch</i>	Doyle Bar
1:00 pm – 1:30 pm	Accredited Investors: SEC Representative TBA	Dupont Ballroom

1:30 pm – 2:00 pm	Fraud in the Workplace: Elizabeth Curtis , General Counsel, Equity Trust Company; Kevin Hall , Partner, Womble, Bond Dickenson; Todd Carroll , Partner, Womble, Bond Dickenson	Dupont Ballroom
2:00 pm – 2:30 pm	Retirement Plan Research Recent Findings: Chris Bailey, Director of Retirement, Cerulli (<i>invited</i>)	Dupont Ballroom
2:30 pm - 3:00 pm	<i>Sponsor Showcase and Raffles</i>	Dupont Ballroom
3:00 pm – 3:30 pm	<i>Afternoon Snack Break</i>	Dupont Ballroom

Roundtables	Topic	Moderator	Location
3:35 pm - 4:10 pm	529 vs Trump Accounts vs Roth IRAs	Mike Hadley, Davis & Harman	Kalorama
	Deep Dives into Prohibited Transactions	Mat Sorensen, Directed IRA	Georgetown
4:15 pm - 4:55 pm	Litigation Update	Todd Carroll & Kevin Hall, Womble, Bond Dickenson LLP	Kalorama
	Roth/ Simple/ SEPS Catch-ups	JP Ruiz, Ruiz Consulting	Kalorama

5:00 pm - 6:00 pm Cocktail Party

Tuesday, April 21, 2026

7:30 am – 9:00 am	<i>Breakfast</i>	Doyle Bar
8:00 am – 8:45 am	<i>Regular Members Only Breakfast Meeting</i>	Dupont Ballroom
9:00 am – 9:30 am	RITA Update: Mary Mohr, Executive Director, RITA	Dupont Ballroom
9:30 am – 10:00 am	Alternatives in 401K Plans: Dan Aronowitz, Assistant Secretary of Labor, Employee Benefits Security Administration (<i>invited</i>)	Dupont Ballroom
10:00 am – 10:30 am	IRS Update: Laura Warshawsky , Deputy Associate Chief Counsel, IRS; Patrick Gutierrez , Tax Law Specialist, Office of Associate Chief Counsel, IRS	Dupont Ballroom
10:30 am – 11:00 am	<i>Morning Break & Hotel Check Out</i>	
11:00 am – 12:00 pm	Panel: Fraud through Artificial Intelligence & Ransomware Prevention: Moderator: Scott Schwartz , Delaware Depository Trust	Dupont Ballroom

12:00 pm – 1:00 pm	<i>Lunch</i>	Doyle Bar
1:00 pm – 1:45 pm	Panel: SDIRA Fraud Alerts: Julia MacBeth , Supervisory Special Agent, Federal Bureau of Investigation, FBI (<i>invited</i>); Lori Schock , Director, Office of Investor Education and Advocacy, Securities and Exchange Commission (<i>invited</i>) Moderator: Kaaren Hall , CEO, uDirect IRA Services	Dupont Ballroom
1:45 pm – 2:15 pm	<i>Sponsor Showcase and Raffles</i>	
2:15 pm – 2:45 pm	<i>Afternoon Snack Break</i>	

Roundtables	Topic	Moderator	Location
2:50 pm - 3:45 pm	Compliance	Stephanie Franco, Delaware Depository Trust	Kalorama
	Onboarding New Private Equity Investments	Jeff Thompson, Strata Trust	Georgetown
3:50 pm - 4:40 pm	Operations	Tammy Wendoll, Columbia Private Trust	Kalorama
	AI in the Workplace	Scott Schwartz, Delaware Depository Trust (<i>invited</i>)	Georgetown

4:45 pm - 5:00 pm Open Discussions/Closing Remarks
5:00 pm Conference Adjourns

THANK YOU SPONSORS!

