

DRAFT

## AGENDA

### STANDARDS FOR EXEMPTION: OLD RULES, NEW WORLD

October 20-21, 2022

Thursday, October 20, 2022

2:00 p.m. – 3:30 p.m.

**Standards for Exemption: History, Rules, and Current Realities**

Ellen P. Aprill, *Presenter*  
James J. Fishman, *Commentator*  
Jill R. Horwitz, *Commentator*

4:00 p.m. – 5:30 p.m.

**Standards for Exemption: Speech**

Lloyd Hitoshi Mayer, *Presenter*  
Mark E. Chopko, *Commentator*  
Miriam Galston, *Commentator*

5:30 p.m. – 6:30 p.m.

RECEPTION

6:30 p.m. – 8:30 p.m.

DINNER

Friday, October 21, 2022

9:00 a.m. – 10:30 a.m.

**Standards for Exemption: Commerciality**

John D. Colombo, *Presenter*  
Michael I. Sanders, *Commentator*  
A.L. (Lorry) Spitzer, *Commentator*

11:00 a.m. – 12:30 p.m.

**Standards for Exemption: Inurement, Private Benefit, and Excess Benefit Transactions**

Harvey P. Dale, *Presenter*  
Ruth M. Madrigal, *Commentator*  
Richard L. Schmalbeck, *Commentator*

12:30 p.m. – 2:00 p.m.

LUNCH

2:00 p.m. – 3:30 p.m.

**Technology: Old Rules Confront IT**

Roger Colinvaux, *Presenter*  
Lucy Bernholz, *Commentator*  
Steven T. Miller, *Commentator*

3:30 p.m.

SHERRY BAR