



# CAPITAL SUMMIT

This conference places attendees at the forefront of payroll compliance. Government insiders will present the latest and emerging legislative and regulatory requirements that affect payroll operations.

**March 17–18, 2025**

**Hilton Arlington National Landing Hotel  
Arlington, Virginia USA**

  
**PayrollOrg**

[Payroll.org/Summit](https://Payroll.org/Summit)

Earn up to 14.0 RCHs, 1.40 CEUs,  
or 16.5 CPE credits



# AGENDA

## MONDAY, MARCH 17

**7:00 a.m. – 8:00 a.m.**

Registration/Breakfast

**8:00 a.m. – 9:15 a.m.**

Welcome

*Setting the Stage: The Legislative and Regulatory Landscape*

**9:15 a.m. – 10:15 a.m.**

*Knowing and Calculating Paid Leave Mandates*

**10:15 a.m. – 10:30 a.m.**

Break

**10:30 a.m. – 11:30 a.m.**

*A Conversation With the Social Security Administration*

**11:30 a.m. – 12:30 p.m.**

*Navigating Wage Garnishments: Payroll and Creditor Perspectives on Compliance Challenges*

**12:30 p.m. – 2:00 p.m.**

Lunch

*Leadership at the Forefront*

*Government Relations at PayrollOrg*

**2:00 p.m. – 3:00 p.m.**

*Payroll's Purpose: The Rising Tide of Pay Transparency*

**3:00 p.m. – 4:00 p.m.**

*Federal Child Support, A Conversation*

**4:00 p.m. – 4:15 p.m.**

Break

**4:15 p.m. – 5:15 p.m.**

*A Risk Management Framework to Prevent Fraud*

**5:15 p.m. – 6:15 p.m.**

Cocktail Reception

## TUESDAY, MARCH 18

**7:00 a.m. – 8:00 a.m.**

Registration/Breakfast

**8:00 a.m. – 9:00 a.m.**

*Instant Payments – An Update on the FedNow<sup>®</sup> Service*

**9:00 a.m. – 10:00 a.m.**

*IRS Transformation and Federal Tax Issues*

**10:00 a.m. – 10:15 a.m.**

Break

**10:15 a.m. – 11:15 a.m.**

*An Interview With the U.S. Census Bureau*

**11:15 a.m. – 12:15 p.m.**

*Wage and Hour Overview From the U.S. Department of Labor*

**12:15 p.m. – 1:30 p.m.**

Networking Lunch

**1:30 p.m. – 2:30 p.m.**

*State Perspectives on Child Support*

**2:30 p.m. – 2:45 p.m.**

Break

**2:45 p.m. – 3:45 p.m.**

*A Practical Guide to AI and Automation for Payroll*

**3:45 p.m. – 4:00 p.m.**

Closing and Door Prizes

*All times are in Eastern Daylight Time*

# SCHEDULE

## MONDAY, MARCH 17

**8:15 a.m. – 9:15 a.m.**

### **Setting the Stage: The Legislative and Regulatory Landscape**

To start the 2025 Capital Summit, the presenter will provide an overview of trends in government decision-making with potential payroll impacts

FOS: Business Law / 1.0 RCH/0.1 CEU/ 1.0 CPE

#### **Thaddeus Inge**

*Vice President  
Van Scoyoc Associates*

**9:15 a.m. – 10:15 a.m.**

### **Knowing and Calculating Paid Leave Mandates**

As states continue to enact mandates for employer-provided paid leave, payroll professionals need to pay close attention to definitions, thresholds, covered types of leave, and time-off calculations. The presenters will discuss state paid leave requirements and offer useful management tools.

FOS: Business Law/ 1.0 RCH/0.1 CEU/ 1.0 CPE

#### **Speaker TBD**

*Title TBD  
Company TBD*

**10:30 a.m. – 11:30 a.m.**

### **A Conversation With the Social Security Administration**

Through a conversation, attendees will learn about the latest information on social security withholding and reporting, including electronic filing opportunities, online services, forms, filing dates, unique situations, and future plans of the Social Security Administration.

FOS: Taxes / 1.0 RCH/0.1 CEU/ 1.0 CPE

#### **Matthew Newton**

*Technical Advisor, Office of Earnings and International Operations  
Social Security Administration*

**11:30 a.m. – 12:30 p.m.**

### **Navigating Wage Garnishments: Payroll and Creditor Perspectives on Compliance Challenges**

Variations in creditor garnishment requirements and procedures among states is one of the most vexing compliance issues. The interactions between creditors, employees/debtors, and payroll can sometimes be a challenge. Join us for an information sharing panel on the perspectives of payroll and creditors/attorneys.

FOS: Business Law / 1.0 RCH/0.1 CEU/ 1.0 CPE

#### **Christena Verrill, CPP**

*Payroll Manager  
L.L. Bean*

#### **Nathan Willner, Esq.**

*Government Relations Director  
National Creditors Bar Association*

**12:30 p.m. – 1:45 p.m.**

Lunch

### **Leadership at the Forefront**

Muriel Bowser is the seventh elected mayor of Washington, DC with 25 years of management and financial experience balancing budgets, achieving AAA bond ratings, and clean audits.

FOS: Business Law/ 1.0 RCH/0.1 CEU/ 1.0 CPE

#### **The Honorable Muriel Bowser**

*Mayor  
District of Columbia*

### **Government Relations at PayrollOrg**

Hear what PayrollOrg is doing to support payroll professionals before government legislatures and agencies.

#### **Alice Jacobsohn, Esq.**

*Director, Government Relations  
PayrollOrg*

# SCHEDULE

**MONDAY, MARCH 17**

*Office of Child Support Services  
U.S. Department of Health and Human Services*

**2:00 p.m. – 3:00 p.m.**

## **Payroll's Purpose: The Rising Tide of Pay Transparency**

The pressure on employers to ensure equitable pay for employees has never been greater. Many states are implementing pay transparency requirements with significant risks for employers. Do payroll providers and compensation professionals understand the vast array of legal requirements so they can assist their companies with compliance efforts? Attendees will come away prepared to face the rising tide of pay transparency requirements.

FOS: Business Law / 1.0 RCH/0.1 CEU/1.0 CPE

**Kathleen McLeod Caminiti, Esq.**

*Partner  
Fisher & Phillips, LLP*

**Eleanor F. Miller, Esq.**

*Associate  
Fisher & Phillips, LLP*

**3:00 p.m. – 4:00 p.m.**

## **Federal Child Support, A Conversation**

The federal Office of Child Support Services (OCSS) will offer its perspective on child support issues and tools for payroll professionals through a discussion between a member of PayrollOrg and a leader from OCSS's Employer Services team.

FOS: Business Law / 1.0 RCH/0.1 CEU/1.0 CPE

**Sherri Grigsby**

*Deputy Director, Division of Federal Services*

**4:15 p.m. – 5:15 p.m.**

## **A Risk Management Framework to Prevent Fraud**

Leaders managing the Automated Clearing House will talk about payment risk reduction, such as increasing awareness of fraud schemes, reducing the incidence of successful fraud attempts, and improving the recovery of funds after frauds have occurred.

FOS: Business Law/ 1.0 RCH/0.1 CEU/1.0 CPE

**James Colassano**

*Senior Vice President, RTP Business Product Management  
The Clearing House*



# SCHEDULE

**TUESDAY, MARCH 18**

**8:00 a.m. – 9:00 a.m.**

## **Instant Payments – An Update on the FedNow® Service**

The FedNow® Service is a new service for instant payments built by the Federal Reserve to help make everyday payments fast and convenient. Banks and credit unions of all sizes can sign up for the service and offer new instant payment services to their customers, including employer payroll accounts.

FOS: Business Law / 1.0 RCH / 0.1 CEU / 1.0 CPE

**Daniel H. Gonzalez**

*Vice President and National Account Director  
Federal Reserve Financial Services*

**9:00 a.m. – 10:00 a.m.**

## **IRS Transformation and Federal Tax Issues**

With funds from the Inflation Reduction Act, the IRS is focused on improving the taxpayer experience with digital transformation. What does this mean for employment tax management? Find out more about the IRS's vision for the agency and the changes already made, along with an update on tax issues with payroll impacts.

FOS: Taxes / 1.0 RCH / 0.1 CEU / 1.0 CPE

**Daniel Lauer**

*Director, Examination – Specialty Tax, SB/SE  
Internal Revenue Service*

**10:15 a.m. – 11:15 a.m.**

## **An Interview With the U.S. Census Bureau**

Through an interview, the U.S. Census Bureau will talk about the data it collects from payroll, why the data is collected, how the data is analyzed, who has access to the data, and how the data can be used by payroll.

FOS: Business Law / 1.0 RCH / 0.1 CEU / 1.0 CPE

**Charles F. Brady, Jr.**

*Branch Chief, Respondent Outreach and Promotion Branch  
Economic Management Division*

**11:15 a.m. – 12:15 p.m.**

## **Wage and Hour Overview From the U.S. Department of Labor**

The U.S. Department of Labor's Wage and Hour Division (WHD) is responsible for implementing the Fair Labor Standards Act, including federal minimum wage, overtime pay, and recordkeeping requirements. In this session, attendees will hear an update on rulemaking and guidance at the WHD, along with any pending considerations.

FOS: Business Law / 1.0 RCH / 0.1 CEU / 1.0 CPE

**Patricia Davidson**

*Deputy Administrator, Wage and Hour Division  
U.S. Department of Labor*

**1:30 p.m. – 2:30 p.m.**

## **State Perspectives on Child Support**

Reporting and withholding of lump-sum payments, new hire reporting of independent contractors, medical support notices, and electronic management of child support, are just some of the issues that will be discussed in this session.

FOS: Business Law / 1.0 RCH / 0.1 CEU / 1.0 CPE

**Konitra K. Jack, Esq.**

*Child Support Enforcement Director  
Louisiana Department of Children and Family Services*

**2:45 p.m. – 3:45 p.m.**

## **A Practical Guide to AI and Automation for Payroll**

Attendees will learn about in-practice payroll uses for artificial intelligence (AI) and automation. What can systems do to transform payroll processes? Are AI and automation and get answers to the following questions. available for all payroll departments regardless of size or industry? What should payroll managers consider when deciding on AI and automation?

FOS: Business Law / 1.0 RCH / 0.1 CEU / 1.0 CPE

**Speaker TBD**

*Title TBD*

*Company TBD*

# 2025 CAPITAL SUMMIT | REGISTRATION FORM

Register online: [Payroll.org/Summit](http://Payroll.org/Summit)

1	Registration
Event code: <b>25SUMMIT</b>	
<input type="checkbox"/> I am a PayrollOrg Member. ID # _____ \$880	
<input type="checkbox"/> I am a COLLEAGUE of a PayrollOrg Member (at the same street address) __ \$1,060	
Colleague's ID #: _____	
Member's Name: _____	
Member's ID #: _____	
<input type="checkbox"/> I am not a PayrollOrg Member or Colleague. ID # (if known) _____ \$1,210	
<input type="checkbox"/> I would like to join PayrollOrg now AND register at the member rate	
<b>Members save up to \$150 when registering for this conference!</b>	Capital Summit Registration Fee .....\$880
	Membership Dues* ..... \$305
	One-Time Enrollment Fee.....\$35
	<b>TOTAL.....\$1,220</b>

2	Registrant Information (please print)
<b>Registrant's Primary Address</b>	
Name: _____	
Title: _____	
Organization: _____	
Street Address: _____	
City: _____	
State/Province: _____ Country: _____	
Zip + 4-Digit/Postal Code: _____ + _____	
Phone: _____ Fax: _____	
<small>(Area/Country Code) (Area/Country Code)</small>	
Email: _____	
<small>(For official PayrollOrg communications, registration confirmations, Payroll Currently, and PAYTECH-Digital)</small>	
Please indicate if you are: <input type="checkbox"/> CPA <input type="checkbox"/> PA (For NASBA reporting purposes)	
<b>Special Dietary Request!:</b>	
<input type="checkbox"/> Vegetarian <input type="checkbox"/> Gluten-free <input type="checkbox"/> Kosher <input type="checkbox"/> Peanut Allergy	
<input type="checkbox"/> Dairy Allergy <input type="checkbox"/> Shellfish Allergy	
<i>Special Dietary Requests received after February 24 cannot be guaranteed.</i>	
<b>Needed for account verification:</b>	
Birth date: _____ / _____ / _____	


**Have you ever:**

Purchased something from PayrollOrg (formerly APA and GPMI)?  Yes  No

Had a membership with PayrollOrg (formerly APA and GPMI)?  Yes  No

If yes, what name was it under? \_\_\_\_\_

What was the company name? \_\_\_\_\_

 PayrollOrg is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.learningmarket.org](http://www.learningmarket.org). PayrollOrg's sponsor identification number is 103152.

No prerequisites or advance preparation required. Delivery method: Group Live  
Course level: Overview. Fields of Study: See individual workshop descriptions.

**Contact:** [certification@Payroll.org](mailto:certification@Payroll.org) to request CPE credits for Capital Summit.

**CPE Complaint Resolution Policy:** PayrollOrg will make every effort to resolve complaints regarding NASBA compliance within a reasonable amount of time and in a confidential manner. A formal complaint must be submitted in writing and must set forth a statement of the facts and the specific remedy sought.

**Submit CPE complaints to:** PayrollOrg, Attn: Certification Manager, 660 North Main Avenue, Suite 100, San Antonio, TX 78205-1217. Certification Manager: (210) 224-6406.

3	Payment Information
Payment in U.S. dollars must accompany your order. Currency Converter: <a href="http://www.xe.com">www.xe.com</a>	
<b>Purchase options:</b> <b>Online</b> <b>Mail</b> Payroll.org To address below	
CAMPAIGN CODE** _____	
DISCOUNT AMOUNT US\$ _____	
<input type="checkbox"/> CREDIT ON ACCOUNT	
<input type="checkbox"/> PURCHASE ORDER # : _____ (government agencies/universities only)	
<input type="checkbox"/> CHECK #: _____	
Please contact Customer Service at +1 210-224-6406 if you need assistance with placing your order.	
<b>Make CHECK payable and mail to:</b>	
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<b>Email:</b> <a href="mailto:CustomerService@payroll.org">CustomerService@payroll.org</a> • <b>Visit:</b> Payroll.org	
<b>Phone:</b> +1 210 224 6406 • M-F, 7 a.m. – 5 p.m. CT	
<input type="checkbox"/> I have read and agree to the Event Policies found at <a href="http://Payroll.org/policies">Payroll.org/policies</a> , which include a Code of Conduct and an Attendee Liability and Waiver of Claims.	

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

**Registration Fees:** Fees include two breakfasts, four 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 PayrollOrg at (210) 224-6406, M-F, 7:00 a.m. – 5:00 p.m. CT, to confirm your registration.

**Special Dietary Requests and Services:** By requesting a special meal and indicating the meal functions you will be attending, you confirm that you will be eating your special request meal purchased by PayrollOrg on your behalf. There is no additional charge for the special request meal(s), unless you elect not to eat it, fail to pick up the special request meal, or eat a regular attendee meal in its place. In any of these instances, you will be invoiced \$50.00 for each special request meal that you ordered. Dietary requests made within two weeks from event start date cannot be guaranteed. Special meals are limited to those who selected them and will not be honored on-site. If you have a disability or require special services, please call Customer Service at +1 210 224 6406, M-F, 7 a.m. – 5 p.m. CT, at least 21 days in advance of the event.

**Hotel Accommodations:** PayrollOrg has reserved a block of guest rooms at the Hilton Arlington National Landing Hotel, 2399 Richmond Highway, Arlington, VA 22202 at the rate of \$229 single or double occupancy, exclusive of appropriate state and local taxes. The special rates are available from March 15 to March 19, 2025. The cut-off date for guest room reservations is February 24, 2025. After February 24, 2025, 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. Room reservations and hotel arrangements at the Hilton Arlington National Landing Hotel are the responsibility of the individual. Check in time is 3:00 p.m. Reservations can be made at: <https://book.passkey.com/go/CAPITALSUMMIT25>

Last updated: **January 21, 2025** EMT: 9V

<b>FOR OFFICE USE ONLY: 25SUMMIT</b>			
Date: _____	Order #: _____	Batch #: _____	
Group #: _____	Check #: _____	C/P: _____	Total: \$ _____