



CAPITAL SUMMIT



This conference presents the latest on federal and state regulatory developments impacting payroll, offering attendees expert guidance on compliance from government insiders.

March 16–17, 2026

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



PayrollOrg[®]
Payroll.org/Summit

Earn up to 12.0 RCHs, 1.20 CEUs,
or 14 CPE credits.

Sponsored by





AGENDA

All times are in Eastern Daylight Time

MONDAY, MARCH 16

7:00 A.M. – 8:00 A.M.

Registration/Breakfast

8:00 A.M. – 8:15 A.M.

Welcome

8:15 A.M. – 9:15 A.M.

Critical Issues for Payroll

9:15 A.M. – 10:15 A.M.

Resources to Better Manage Child Support

10:15 A.M. – 10:30 A.M.

Break

10:30 A.M. – 11:30 A.M.

Examining Alternatives in Employee Pay

11:30 A.M. – 12:30 P.M.

Optimize Your Understanding
of Local Payroll Taxes

12:45 P.M. – 2:00 P.M.

Networking Lunch

2:00 P.M. – 3:00 P.M.

A Deep Dive Into Census
Bureau Economic Data

3:00 P.M. – 3:15 P.M.

Break

3:15 P.M. – 4:15 P.M.

Essential Insights on Payroll
Tax Compliance for Multistate Workforces

4:15 P.M. – 5:15 P.M.

Fast Track Your Understanding
of Social Security

TUESDAY, MARCH 17

7:00 A.M. – 8:00 A.M.

Registration/Breakfast

8:00 A.M. - 9:00 A.M.

Everything You Need to Know
About the Federal Reserve

9:00 A.M. – 10:00 A.M.

Winning Ways to Master State Child Support

10:00 A.M. – 10:15 A.M.

Break

10:15 A.M. – 11:15 A.M.

Government Research on Tax Accountability

11:15 A.M. – 12:15 P.M.

Best Practices for Wage and Hour Compliance

12:15 P.M. – 1:30 P.M.

Networking Lunch

1:30 P.M. – 2:30 P.M.

Engaging With the IRS

2:30 P.M. – 2:45 P.M.

Closing and Door Prizes





MONDAY, MARCH 16

8:15 A.M. – 9:15 A.M.

Critical Issues for Payroll

FOS: BUSINESS LAW/1.0 RCH/0.1 CEU/1.0 CPE

Setting the stage for the 2026 Capital Summit, this session will provide a high-level overview of payroll impacts arising from recently enacted tax legislation, along with emerging legislative and regulatory developments.

Daniel Lewis, Esq.

*Vice President, Compliance Programs and Government Affairs
ADP, LLC*

*President, National Payroll
Reporting Consortium*

9:15 A.M. – 10:15 A.M.

Resources to Better Manage Child Support

FOS: BUSINESS LAW/1.0 RCH/0.1 CEU/1.0 CPE

The federal Office of Child Support Enforcement (OCSE) 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 OCSE's Employer Services team.

Sherri Grigsby

*Deputy Director, Division of Federal Systems
Office of Child Support Enforcement
U.S. Department of Health and Human Services*

10:30 A.M. – 11:30 A.M.

Examining Alternatives in Employee Pay

FOS: BUSINESS LAW/1.0 RCH/0.1 CEU/1.0 CPE

Modern business and consumer payment tools are changing the character of employee payments. This evolution is impacting how, what, and when we pay workers. This session will cover the expanding range of payment rail options and the challenges faced with adopting these new practices.

Michael Baer, CPP

*President
Baer Unlimited*

Anthony Peculic

*Vice President, Product/Technology
Marqeta*

11:30 A.M. – 12:30 P.M.

Optimize Your Understanding of Local Payroll Taxes

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

Local payroll tax compliance has never been more complex. With hybrid workforces, employee relocations, and changing municipal tax rules, payroll teams are under pressure to get it right. In this session, attendees will learn how to build an accurate and automated local tax compliance strategy.

Tim Wallen

*Director of Business Services / Payroll Consultant
Fit Money CPA*

Kelly Westfall

*Head of Payroll
GPD Group*

2:00 P.M. – 3:00 P.M.

A Deep Dive Into Census Bureau Economic Data

FOS: BUSINESS LAW/1.0 RCH/0.1 CEU/1.0 CPE

The U.S. Census Bureau provides economic data through various surveys and indicators, including collecting and analyzing payroll data. Learn more about current projects and how the data is collected and used.

Tandace Wilson, MBA

*Statistician
Respondent Outreach and Promotion Branch
Economic Management Division
U.S. Census Bureau*

3:15 P.M. – 4:15 P.M.

Essential Insights on Payroll Tax Compliance for Multistate Workforces

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

State tax compliance is complicated especially for multi-jurisdictional tax issues for remote and hybrid work forces. Topics will include state income tax withholding rules, unemployment insurance contributions, state-specific benefit programs, nonresident income tax withholding, and more.

Stephen Kenney, Esq.

*Associate
Ogletree Deakins*

Michael Mahoney, Esq.

*Shareholder
Ogletree Deakins*

4:15 P.M. – 5:15 P.M.

Fast Track Your Understanding of Social Security

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

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.

Matthew Newton

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

Program and speakers subject to change without notice.



TUESDAY, MARCH 17

8:00 A.M. – 9:00 A.M.

Everything You Need to Know About the Federal Reserve

FOS: BUSINESS LAW/1.0 RCH/0.1 CEU/1.0 CPE

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.

Daniel Gonzalez

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

9:00 A.M. – 10:00 A.M.

Winning Ways to Master State Child Support

FOS: BUSINESS LAW/1.0 RCH/0.1 CEU/1.0 CPE

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.

Eileen Stack, Esq.

*Deputy Commissioner
Division of Child Support Services
New York State Office of Temporary
and Disability Assistance*

10:15 A.M. – 11:15 A.M.

Government Research on Tax Accountability

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

The U.S. Government Accountability Office (GAO) is an independent agency for congressional research and recommendations on saving money and improving efficiency. The GAO will share information on its recent work on tax policy and administration.

Dawn Bidne

*Senior Analyst, Strategic Issues
U.S. Government Accountability Office*

Erin Saunders-Rath, Ph.D.

*Assistant Director, Strategic Issues
U.S. Government Accountability Office*

11:15 A.M. – 12:15 P.M.

Best Practices for Wage and Hour Compliance

FOS: BUSINESS LAW/1.0 RCH/0.1 CEU/1.0 CPE

The U.S. Department of Labor's Wage and Hour Division (WHD) is responsible for implementing the Fair Labor Standards Act, including the 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.

Andrew Rogers, Esq.

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

1:30 P.M. – 2:30 P.M.

Engaging With the IRS

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

This session is designed to help payroll professionals navigate the Internal Revenue Service (IRS). Discussion will include how payroll professionals can interact with the IRS and agency plans for stakeholder engagement. Bring your questions.

Andrew Holubeck, Esq.

*Attorney-Advisor
Office of Chief Counsel
Internal Revenue Service*

Marcia North

*Senior Tax Analyst
Internal Revenue Service*

Mikhail Zhidkov, Esq.

*Attorney-Advisor
Office of Chief Counsel
Internal Revenue Service*

Program and speakers subject to change without notice.

2026 CAPITAL SUMMIT | REGISTRATION FORM

Register online: Payroll.org/Summit

1	Registration
Event code: 26SUMMIT	
<input type="checkbox"/> I am a PayrollOrg Member. ID # _____	\$899
<input type="checkbox"/> I am not a PayrollOrg Member or part of Team PAYO. _____	\$1,229
<input type="checkbox"/> I would like to join PayrollOrg now AND register at the member rate	
Capital Summit Registration Fee	\$899
Membership Dues*	\$312
One-Time Enrollment Fee	\$35
Members save up to \$330 when registering for this conference!	TOTAL \$1,246

2	Registrant Information (please print)
Registrant's Primary Address	
Name: _____	
Title: _____	
Organization: _____	
Street Address: _____	
City: _____	
State/Province: _____ Country: _____	
Zip + 4-Digit/Postal Code: _____ + _____	
Phone: _____ Fax: _____	
<small>(Area/Country Code)</small>	<small>(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)	
Special Dietary Request¹:	
<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 23 cannot be guaranteed.</i>	
Needed for account verification:	
Birth date: _____ / _____ / _____	


Have you ever:

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

Had a membership with PayrollOrg (formerly APA and GPPI)? 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. 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 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: www.xe.com	
Purchase options:	Online Payroll.org
	Mail 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.	
Make CHECK payable and mail to:	
PayrollOrg	
660 North Main Avenue, Suite 100 San Antonio, TX 78205-1217 USA	
Email: CustomerService@payroll.org • Visit: Payroll.org	
Phone: +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 Payroll.org/policies , 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 offered individually or through group enrollments of individuals from the same company with Team PAYO. 100% of PayrollOrg membership dues are deductible as an ordinary business expense.

Registration Fees: Fees include two breakfasts, three breaks, and two lunches. 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 \$235 single or double occupancy, exclusive of appropriate state and local taxes. The special rates are available from March 13 to March 20, 2026. The cut-off date for guest room reservations is February 23, 2026. After February 23, 2026, 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 4:00 p.m. Reservations can be made at: <https://book.passkey.com/go/2026capitalsummit>

Last updated: March 10, 2026 **EMT: 9V**

FOR OFFICE USE ONLY: 26SUMMIT			
Date: _____	Order #: _____	Batch #: _____	
Group #: _____	Check #: _____	C/P: _____	Total: \$ _____