

# 2015 Nonprofit Organizations Primer

## January 14, 2015 • Four Seasons Hotel • Austin, TX

### Wednesday Afternoon, Jan. 14, 2015

**Presiding Officer:**

**Coleith Molstad**, The Roy F. & Joann Cole Mitte Foundation - Austin, TX

2:30 pm	<p><b>Registration Opens</b></p> <p>Includes light refreshments.</p>
3:25 pm	<p><b>Welcoming Remarks</b></p>
3:30 pm 0.75 hr	<p><b>Nonprofits 101</b></p> <p>An overview of the essential characteristics of nonprofit organizations and the requirements, benefits and restrictions of tax-exemption.</p> <p>Jonathan S. Blum, Polsinelli PC - Dallas, TX</p>
4:15 pm 0.75 hr	<p><b>UBIT 101</b></p> <p>Learn about the rules governing the unrelated business income tax, exceptions and exclusions, plus strategies for coping.</p> <p>Edward T. Chaney, Schell Bray PLLC - Chapel Hill, NC</p>
5:00 pm 0.75 hr	<p><b>Finance for Nonprofits 101</b></p> <p>Gain insight into the basic finance and accounting issues—including terminology—that arise in the context of the day-to-day activities of nonprofit organizations.</p> <p>Jamie Holtzman, Holtzman Partners, LLP - Austin, TX</p>
5:45 pm	<p><b>Break</b></p>

### CONCURRENT SESSIONS

**The Components of Form 990-PF**

**Presiding Officer:**

**Coleith Molstad**, The Roy F. & Joann Cole Mitte Foundation - Austin, TX

6:00 pm 0.75 hr	<p><b>The Components of Form 990-PF</b></p> <p>Learn about the 990-PF, its essential components and the specific organizational requirements that it addresses, including the calculation of net investment income, determination of required qualifying distributions, and compliance with excise tax rules. Develop an understanding of what the 990-PF shows and how it can be used as an effective tool to monitor important compliance issues and avoid prohibited transactions.</p> <p>Tricia Johnson, Ernst &amp; Young LLP - Cincinnati, OH</p>
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6:45 pm

**Adjourn to Reception**

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**The Components of Form 990**

**Presiding Officer:**

**Lucille DiDomenico**, Philanthropy Southwest - Dallas, TX

6:00 pm  
0.75 hr

**The Components of Form 990**

Gain an understanding of the core form and the schedules that comprise the Form 990. This session is an ideal introduction for beginners and a refresher for the more advanced preparers and management team members, and highlights fundamental concepts, key line items and reporting options. Learn how the 990 can be used as an effective public relations tool for your organization.

Michaela J. Cromar, Sanford, Baumeister & Frazier, LLP - Fort Worth, TX

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6:45 pm

**Adjourn to Reception**

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6:45 pm

**Welcome Reception**

Join us for a networking opportunity with faculty and colleagues.

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7:30 pm

**Reception Ends**

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