UT LAW CLE Continuing Legal Education

2018 Nonprofit Organizations Literacy Workshop
January 17, 2018 • Four Seasons Hotel • Austin, TX

Wednesday Afternoon, Jan. 17, 2018

Nonprofit Organizations Literacy (Main Ballroom)

Understanding issues at the center of a nonprofit's operation is essential. These presentations focus on key areas for both private foundations and charitable organizations—governance, UBIT, investment, and financial statements—and outline basic concepts and practical guidance for practitioners.

See presentation details and times below – select on registration form.

IRS Audit Workshops (Small-Group Breakouts)

An IRS audit won't happen to my organization, you say—until it does. Audit preparedness should be at the center of any good compliance regime for a Section 501(c)(3) public charity or private foundation, whether you're audited this year or in 2030. In these small-group breakouts, review the basics of an IRS audit and gain practical advice on preparing for, understanding, managing, and ultimately surviving the audit process.

See workshop opportunities and times below - select on registration form.

Moderator:
Megan E. Bell, Patterson Belknap Webb & Tyler LLP - New York, NY

12:30 pm — **Registration Opens**

Includes light refreshments.

1:20 pm — **Welcoming Remarks**

1:30 P.M. CONCURRENT SESSIONS

Please select on registration form. Each session ends with a 15-minute break.

1A: Governance Literacy
Presiding Officer:
Lucille DiDomenico, Philanthropy Southwest - Dallas, TX

1:30 pm
1.00 hr

1A: Governance Literacy

Governance at nonprofit organizations is often not a priority until something goes wrong. Gain practical tips to help board and staff members avoid problems, and review governance topics including fiduciary duties, governing documents, policies, procedures, and the roles of the board, officers, committees, and staff members.

Meredith S. Camp, Wells Fargo Bank - Dallas, TX

1B: IRS Audit Workshop: Public Charities (limited capacity)

1:30 pm
1.00 hr

1B: IRS Audit Workshop: Public Charities

Kimberly M. Eney, Morgan, Lewis & Bockius LLP - Washington, DC
Kenneth R. Garner, Ernst & Young LLP - Fort Worth, TX

1C: IRS Audit Workshop: Private Foundations (limited capacity)

1:30 pm
1.00 hr

1C: IRS Audit Workshop: Private Foundations

Katie Gerber, Thompson & Knight LLP - Houston, TX
Megan C. Sanders, Bourland, Wall & Wenzel, P.C. - Fort Worth, TX

2:30 pm

Break

2:45 P.M. CONCURRENT SESSIONS

Please select on registration form. Each session ends with a 15-minute break.

2A: UBIT Literacy

Presiding Officer:
Lucille DiDomenico, Philanthropy Southwest - Dallas, TX

2:45 pm
1.00 hr

2A: UBIT Literacy: You're doing WHAT??

Hear the basics of Unrelated Business Income, including the definition, exceptions, and issues relating to advertising and sponsorship. Examine how much is too much UBI, plus key traps for the unwary.

Michaela J. Cromar, CliftonLarsonAllen LLP - Fort Worth, TX
Rosalinda Marikar, CliftonLarsonAllen LLP - Fort Worth, TX

2B: IRS Audit Workshop: Public Charities (limited capacity)

2:45 pm
1.00 hr

2B: IRS Audit Workshop: Public Charities

Kimberly M. Eney, Morgan, Lewis & Bockius LLP - Washington, DC
Kenneth R. Garner, Ernst & Young LLP - Fort Worth, TX

2C: IRS Audit Workshop: Private Foundations (limited capacity)

2:45 pm
1.00 hr

2C: IRS Audit Workshop: Private Foundations

Katie Gerber, Thompson & Knight LLP - Houston, TX
Megan C. Sanders, Bourland, Wall & Wenzel, P.C. - Fort Worth, TX

3:45 pm

Break

4:00 P.M. CONCURRENT SESSIONS

Please select on registration form. Each session ends with a 15-minute break.

3A: Investment Literacy

Presiding Officer:
Lucille DiDomenico, Philanthropy Southwest - Dallas, TX

4:00 pm
1.00 hr

3A: Investment Literacy

Developing and maintaining a successful investment program that supports the mission and withstands challenging market environments requires the right mix of governance and portfolio management discipline. Review the fiduciary underpinnings, board considerations and policies, and key investment concepts that contribute to an effective investment strategy.

Karey Dubiel Dye, Goldman Sachs & Co. LLC - Houston, TX
Stephanie Kenary, Goldman Sachs & Co. LLC - New York, NY

3B: IRS Audit Workshop: Public Charities (limited capacity)

4:00 pm
1.00 hr

3B: IRS Audit Workshop: Public Charities

Kimberly M. Eney, Morgan, Lewis & Bockius LLP - Washington, DC
Kenneth R. Garner, Ernst & Young LLP - Fort Worth, TX

3C: IRS Audit Workshop: Private Foundations (limited capacity)

4:00 pm
1.00 hr

3C: IRS Audit Workshop: Private Foundations

Kelli Archibald, Ernst & Young LLP - Phoenix, AZ

5:00 pm

Break

5:15 P.M. CONCURRENT SESSIONS

Please select on registration form. Each session ends with a 15-minute break.

4A: Financial Statements Literacy

Presiding Officer:
Lucille DiDomenico, Philanthropy Southwest - Dallas, TX

5:15 pm
1.00 hr

4A: Financial Statements Literacy

Understanding financial statements is the key to understanding the financial health of your organization. Review the basic financial statements (statement of net assets, statement of changes in net assets, and statement of cash flows) and common disclosures. A look at NFP-specific accounting, including donor restrictions, net assets classes, functional expenses, and new guidance.

Jillian Bergman, Holtzman Partners, LLP - Austin, TX
Ruth Snell, Holtzman Partners, LLP - Austin, TX

4B: IRS Audit Workshop: Public Charities (limited capacity)

5:15 pm
1.00 hr

4B: IRS Audit Workshop: Public Charities

Kimberly M. Eney, Morgan, Lewis & Bockius LLP - Washington, DC
Kenneth R. Garner, Ernst & Young LLP - Fort Worth, TX

4C: IRS Audit Workshop: Private Foundations (limited capacity)

5:15 pm 1.00 hr	**4C: IRS Audit Workshop: Private Foundations** Kelli Archibald, Ernst & Young LLP - Phoenix, AZ
6:15 pm	**Adjourn**

Wednesday Evening, Jan. 17, 2018

Welcome Reception (6:15 p.m. – 7:15 p.m.)

Join us for a networking opportunity with faculty and colleagues.

Thank You to Our Sponsor
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