UT LAW CLE

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PHILANTHROPY SOUTHWEST

Philanthropy southwest

36TH ANNUAL

NONPROFIT ORGANIZATIONS INSTITUTE

WORKSHOP
January 16, 2019

INSTITUTE
January 17–18, 2019

Four Seasons Hotel ▪ Austin, Texas

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Workshop—Earn up to 4.00 Hours of MCLE Credit and 5.00 Hours of CPE Credit (NASBA)
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TX Board of Legal Specialization Credit Approved for Estate Planning and Probate Law, and Tax Law

2019

NONPROFIT ORGANIZATIONS BACK TO BASICS WORKSHOP

January 16, 2019 ▪ Four Seasons Hotel ▪ Austin, Texas

Earn up to 4.00 Hours of MCLE Credit; Approved in TX, CA, and OK. TX Board of Legal Specialization Credit Approved for Estate Planning and Probate Law, and Tax Law; Earn up to 5.00 Hours of CPE Credit (NASBA)

WEDNESDAY AFTERNOON, JAN. 16, 2019

12:30 p.m. **Registration Opens** Includes light refreshments.

1:20 p.m. **Welcoming Remarks**

CONCURRENT SESSIONS

Please select one 1:30 p.m., one 2:45 p.m., one 4:00 p.m., and one 5:15 p.m. session on registration form.

BACK TO BASICS PRESENTATIONS (MAIN BALLROOM)

Presiding Officer: Darren B. Moore, Bourland, Wall & Wenzel, P.C., Fort Worth, TX

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 and outline basic concepts and practical guidance for practitioners.

FORM 990-PF AND 990 WORKSHOPS (SMALL GROUP BREAKOUTS)

Walk through the Form 990-PF or Form 990, including tips for filling out key sections, policies, financials, compensation, etc., as well as guidance in gleaning key information when reading a completed forms.

1:30 p.m.
1.00 hr

1A: Back to Basics: Exemption Fundamentals
An overview of exemption under 501(c), and primarily 501(c)(3), examining what it means to be nonprofit and charitable, the organizational and operational tests, private benefit and private inurement, private foundations and public charities, unrelated business income, lobbying and political campaign activities, procedural matters, and more.

Jeffrey E. Sher, FizerBeck, Houston, TX

1B: Form 990-PF Workshop
990-PF Workshops are identical. Please register for the one workshop session of your choice. Space is limited.

1C: Form 990 Workshop
990 Workshops are identical. Please register for the one workshop session of your choice. Space is limited.

2:30 p.m. **Break**

2:45 p.m.
1.00 hr

2A: Back to Basics: Grantmaking and Grantseeking
Experts on both sides of philanthropic funding equation share their expectations and experiences with raising and giving away money.

Julie Lerudis, Boettcher Foundation, Denver, CO
Terry Quinn, The Texas Tribune, Austin, TX

2B: Form 990-PF Workshop
990-PF Workshops are identical. Please register for the one workshop session of your choice. Space is limited.

2C: Form 990 Workshop
990 Workshops are identical. Please register for the one workshop session of your choice. Space is limited.

3:45 p.m. **Break**

4:00 p.m.
1.00 hr

3A: Back to Basics: Revenue Generating Activities and Tax Compliance
An overview of revenue-generating activities, including how to distinguish between related and unrelated activities, taxable and nontaxable unrelated activities, and how to structure activities for the result that the organization wants. Also a (quick) look at whether and when unrelated business taxable income (UBTI) is a "bad thing" and what to do about it if it is becoming a problem.

Michaela J. Cromar, CliftonLarsonAllen LLP, Fort Worth, TX

3B: Form 990-PF Workshop
990-PF Workshops are identical. Please register for the one workshop session of your choice. Space is limited.

3C: Form 990 Workshop
990 Workshops are identical. Please register for the one workshop session of your choice. Space is limited.

5:00 p.m. **Break**

5:15 p.m.
1.00 hr

4A: Back to Basics: Impact Investing
Impact investments are generally private investments made with the intention of generating both a social or environmental impact and a financial return. Increasingly, philanthropic organizations and individuals are using impact investing as a tool to complement grant-making and programmatic activities. Learn about different legal structures and requirements for impact investments, including the difference between program related investments (PRIs) and mission related investments (MRIs). Explore different opportunities to further your organization's mission across the capital spectrum.

Megan Starr, Goldman Sachs & Co. LLC, New York, NY
Maura L. Whelan, Simpson Thacher & Bartlett LLP, New York, NY

4B: Form 990-PF Workshop
990-PF Workshops are identical. Please register for the one workshop session of your choice. Space is limited.

4C: Form 990 Workshop
990 Workshops are identical. Please register for the one workshop session of your choice. Space is limited.

6:15 p.m. **Adjourn to Reception**

THANK YOU TO OUR WELCOME RECEPTION SPONSOR

Frost BANKING INVESTMENTS INSURANCE

6:15 p.m. – 7:15 p.m.

Join us for a networking opportunity with faculty and colleagues.

THURSDAY MORNING, JAN. 17, 2019

Presiding Officer:
Joyce Hellums, Ernst & Young LLP, Austin, TX

7:30 a.m. **Registration Opens**
Includes continental breakfast.

8:50 a.m. **Welcoming Remarks**

9:00 a.m. 1.25 hrs

A View of the Sector One Year Later: Revisiting Tax Reform and Other Legislative Developments for Tax-Exempt Organizations

The Tax Cuts and Jobs Act provisions affecting exempt organizations have posed many interpretive and operational challenges. Explore how, one year after the Act's passage, the interpretive landscape for these provisions has shifted with the preliminary guidance from the IRS and Treasury, and how it may continue to shift in the coming year. Plus, hear discussion on other key trends and legislative developments affecting tax-exempt organizations.

Moderator:
Alexander L. Reid, Morgan, Lewis & Bockius LLP, Washington, DC

Panelists:
Meghan R. Biss, Caplin & Drysdale, Chartered, Washington, DC
Stephen M. Clarke, Ernst & Young LLP, Washington, DC

10:15 a.m. **Break**

CONCURRENT TRACKS

1A: FUNDRAISING AND RESTRICTED GIFTS

Presiding Officer:
Joyce Hellums, Ernst & Young LLP, Austin, TX

10:35 a.m. .75 hr

Advanced Issues in Fundraising

Nonprofits continue to face headwinds in fundraising with increasing demand for diverse and sustainable revenue sources. Review current issues in fundraising including crowdfunding, impact investing, commercial co-ventures, and alternative structures.

Jonathan S. Blum, Polsinelli PC, Dallas, TX
Kristalyn Loson, The Nature Conservancy, Arlington, VA

11:20 a.m. .75 hr

Restricted Gifts and Endowments: Documentation and Financial Statement Disclosure

Hear the legal and accounting perspectives on issues and considerations that apply to restricted gifts and the underlying gift agreements, as well as how new accounting standards apply to these gifts and may affect financial statements.

Neely D. Duncan, BKD, LLP, Dallas, TX
Danika Hudik Mendrygal, Mendrygal Law, PLLC, Dallas, TX

12:05 p.m. **Pick Up Lunch**
Included in registration.

CONCURRENT TRACKS

1B: INVESTING ASSETS AND OUTCOME BASED PHILANTHROPY

Presiding Officer:
Karey Dubiel Dye, Goldman Sachs & Co. LLC, Houston, TX

10:35 a.m. .75 hr

Investing Charitable Assets: Fiduciary Issues in Managing the Investment Portfolio

What are the best practices that foundation trustees and board members need to implement to fulfill their fiduciary duties? Does using an OCIO to manage funds alleviate your fiduciary responsibility?

Tyree Collier, Thompson & Knight LLP, Dallas, TX
Norman E. Nabhan, Graystone Consulting, Houston, TX

11:20 a.m. .75 hr

Outcome Based Philanthropy: Thinking About and Measuring Impact in an Increasingly Complex World

Hear strategies for incentivizing grantees and other partners against a shared set of programmatic objectives through outcome-based funding and agreement terms, and the related tax implications, while promoting good stewardship of charitable assets.

Karen M. Halazon, Bill & Melinda Gates Foundation, Seattle, WA

12:05 p.m. **Pick Up Lunch**
Included in registration.

CONCURRENT TRACK

1C: MASTER CLASS: VIOLATION OF CHAPTER 42 (limited capacity)

10:35 a.m. 1.50 hrs

Violations of Chapter 42: How to Identify, Correct, and Report While Minimizing Audit Risks

Tomer Inbar, Patterson Belknap Webb & Tyler LLP, New York, NY
Michelle Michalowski, PwC, Washington, DC

12:05 p.m. **Pick Up Lunch**
Included in registration.

THURSDAY AFTERNOON

Presiding Officer:
Tomer Inbar, Patterson Belknap Webb & Tyler LLP, New York, NY

THANK YOU TO OUR LUNCHEON PRESENTATION SPONSOR

NORTHERN TRUST

12:35 p.m. .75 hr

The Role of Collaborative Organizations in Carrying Out Charitable Activities

Understand the role that collaborative organizations can play, and some different approaches, successes, and challenges faced by those organizations.

Moderator:
Mia Hsu Burton, Michael & Susan Dell Foundation, Austin, TX

Panelists:
Margaret B. Black, LH Holdings, Inc./Lyda Hill Foundation, Dallas, TX
Elena M. Marks, Episcopal Health Foundation, Houston, TX
Madge Vasquez, Mission Capital, Austin, TX

1:20 p.m. **Break**

1:35 p.m. 1.00 hr

Discussion with the Texas Attorney General's Office

Hear about some of the key focus areas for the AG's Office, including current enforcement actions and oversight for charitable trusts, and fundraising fraud and multi-state charity enforcement actions.

Moderator:
Susan K. Staricka, Attorney at Law, Austin, TX

Panelists:
Panelists TBD, Office of the Attorney General, Austin, TX

2:35 p.m. Break

CONCURRENT TRACKS

2A: STRUCTURING PRIVATE FOUNDATIONS

Presiding Officer:
Kay Walther, Blazek & Vetterling, Houston, TX

2:55 p.m. .75 hr

Managing Private Philanthropy: 501(C)(4)s, Donor Advised Funds and LLCs, the New Private Foundations

Hillary Bounds, Chan Zuckerberg Initiative, Palo Alto, CA
Andrew Schulz, Arabella Advisors, Washington, DC

3:40 p.m. .75 hr

Private Foundation Restructuring and Terminations

When it comes to restructuring or terminating a private foundation, the devil is in the details. An error could result in a termination tax on the value of the net assets of the private foundation. Hear a high level legal and accounting review of the major considerations with private foundation mergers, split-ups, and terminations, including practical solutions such as utilizing a donor-advised fund as part of a termination.

Jennifer Becker Harris, Clark Nuber PS, Bellevue, WA
Kimberly Eney, Latham & Watkins LLP, Washington, DC

4:25 p.m. Break

NEW THIS YEAR!
SMALL-GROUP "MASTER CLASSES"

For those that want a deep-dive exploration of select topics, check out one of the four Master Classes offered throughout the conference. These small-group sessions are designed to discuss more advanced concepts and strategies, provide more technical information in key areas, and to foster dialogue among facilitators and attendees. Space is limited.

CONCURRENT TRACKS

2B: SOCIAL IMPACT BONDS AND ENTREPRENEURIAL ACTIVITIES

Presiding Officer:
Tomer Inbar, Patterson Belknap Webb & Tyler LLP, New York, NY

2:55 p.m. .75 hr

Social Impact Bonds and Pay for Performance Transactions

An introductory primer on social impact bonds. Understand the fundamental financial and legal structures of these innovative financing mechanisms which bring together governments, social service providers and impact investors to solve challenging social problems.

Navjeet K. Bal, Social Finance, Boston, MA
David A. Levitt, Adler & Colvin, San Francisco, CA

3:40 p.m. .75 hr

Charitable Use and Pursuit of Entrepreneurship Activities: Incubators, Accelerators, Prizes, Funds, and More

Entrepreneurial activities can be a meaningful and productive part of how nonprofits pursue their missions. Education, environment, energy, healthcare, economic development, job training and creation, poverty alleviation, equity, and justice are only a few of the areas that can benefit from innovation and entrepreneurship. But several questions arise: how to implement entrepreneurial activities, how to ensure charitable purposes, how to protect against impermissible private benefit, how to approach involvement by multiple parties, what to do about work product and intellectual property, among others. Learn how these engagements are possible, what to be aware of when doing them, and why this tool should be in even more toolboxes!

Laura E. Butzel, Patterson Belknap Webb & Tyler LLP, New York, NY
John Tyler, Ewing Marion Kauffman Foundation, Kansas City, MO

4:25 p.m. Break

CONCURRENT TRACK

2C: MASTER CLASS: DEVELOPING A PRUDENT INVESTMENT PORTFOLIO (limited capacity)

2:55 p.m. 1.50 hrs

Understanding Investment Policy and Developing a Prudent Investment Portfolio

Shannon H. Morton, Northern Trust Bank, Houston, TX

4:25 p.m. Break

CONCURRENT TRACKS

3A: MANAGING PRIVATE FOUNDATION RISK

Presiding Officer:
Kay Walther, Blazek & Vetterling, Houston, TX

4:35 p.m. .75 hr

Understanding, Planning For, Managing, and Funding Risk in Private Foundation Grantmaking

Hear how philanthropies can use innovative risk management approaches and tools to keep impact on track. Go beyond D&O insurance to see how risk management can address uncertainty and ensure sustainability in grant making—with a clear focus on ultimately protecting the populations you serve.

A. Nicole Campbell, Dalio Philanthropies, Westport, CT

Maya Winkelstein, Open Road Alliance, Washington, DC

5:20 p.m. .75 hr

Navigating Self-Dealing and Conflicts of Interest in an Increasingly Interconnected Environment

Gain tools and ideas to avoid self-dealing penalties for private foundations. The code provision has some flexibility and exceptions for compensation, co-investing, and family offices, but once an impermissible deal occurs, the cash or property involved must be returned and the penalty cannot be abated. Reasonable cause concepts don't apply!

Jody Blazek, Blazek & Vetterling, Houston, TX
Nishka Chandrasoma, Ford Foundation, New York, NY

6:05 p.m. Adjourn to Reception

WORKSHOP ACCREDITATION

CLE CREDIT
This course has been approved for Minimum Continuing Legal Education credit by the State Bar of Texas Committee on MCLE in the amount of 4.00 hours. The University of Texas School of Law is a State Bar of California approved MCLE provider (#1944), and an Oklahoma Bar Association MCLE presumptively approved provider (#169).

CPE CREDIT
The University of Texas School of Law 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.nasbaregistry.org.

Earn up to 5.00 credits in in Business Organization Management
Delivery Method: Group-Live
Program Level: Overview
Advance Preparation: None

CONCURRENT TRACKS

3B: MANAGING PUBLIC CHARITY RISK

Presiding Officer:
Tomer Inbar, Patterson Belknap Webb & Tyler LLP, New York, NY

4:35 p.m. .75 hr

The Sky is Not Falling: Tools for Managing Risk

A discussion on understanding, planning for, managing, and funding risk by focusing on practical tools public charities can use.

Katherine Karl, The Humane Society of the United States, Washington, DC
Nicola Fuentes Toubia, Fuentes Toubia, PLLC, Houston, TX

5:20 p.m. .75 hr

Doing Business with and Compensating Insiders: Strategies for Success and Intermediate Sanctions Compliance

Explore key federal and state law compliance issues pertaining to executive compensation and other insider transactions. From the simple to complex, a highlight of the considerations and options for structuring compensation, such as make-up payments, deferred compensation, and incentive bonus payments.

Bob Cartwright, Intelligent Compensation, LLC, Austin, TX
Edward T. Chaney, Schell Bray PLLC, Chapel Hill, NC

6:05 p.m. Adjourn to Reception

CONCURRENT TRACK

3C: MASTER CLASS: ANATOMY OF A GRANT AGREEMENT (limited capacity)

4:35 p.m. 1.50 hrs

Anatomy of a Grant Agreement

Norah L. Jones, Quarles & Brady LLP, Chicago, IL
Kristy Bernard Tsadick, The William and Flora Hewlett Foundation, Menlo Park, CA

6:05 p.m. Adjourn to Reception

THANK YOU TO OUR RECEPTION SPONSOR

Frost BANKING INVESTMENTS INSURANCE

6:05 p.m. – 7:00 p.m.

Join us for a networking opportunity with faculty and colleagues.

FRIDAY MORNING, JAN. 18, 2019

Presiding Officer:
Sandra Nathan, Philanthropy Southwest, Dallas, TX

7:30 a.m. Conference Room Opens
Includes continental breakfast.

8:00 a.m. .75 hr

Advancing the Common Good in the Texas Legislative Process

Texas nonprofits of all sizes and varieties have become more active in the public forum and in the legislative process to advance their missions and the interests of their constituents. How effective are these activities and how does the "nonprofit sector" rank among the other special interest groups that occupy the policy and political landscape? Do charities, state associations and nonprofit activist groups have a special role—a special voice—in the legislative process different from other interest groups? Do "dark money" organizations reflect negatively on other nonprofit organizations? Are nonprofit entities that perform government functions prepared for the related accountability and transparency in their operations? Discuss these questions in general terms with respect to the realities of the legislative process, with specific references to legislation expected in the 2019 session as well as comments on controversies and legislative challenges to the nonprofit sector in past sessions.

Richard W. Meyer, Attorney at Law, Austin, TX
Ross Ramsey, The Texas Tribune, Austin, TX

8:45 a.m. 1.00 hr

Year in Review

Review current developments in the federal tax law concerning tax-exempt organizations, including the status of Treasury and IRS guidance regarding applicable provisions of the Tax Cuts and Jobs Act, and recently issued proposed regulations, IRS rulings, and court opinions. Address the Exempt Organizations Division's FY 2019 program letter, application of the commerciality doctrine, and recent law developments concerning qualification for tax exemption, the private inurement and private benefit doctrine, legislative and political campaign activity rules, governance, public charity status, supporting organizations, private foundations, unrelated business, fundraising regulations, charitable giving, and litigation.

Bruce R. Hopkins, Bruce R. Hopkins Law Firm, Kansas City, MO

9:45 a.m. Break

CONCURRENT TRACKS

4A: DATA PROTECTION AND BLOCKCHAIN

Presiding Officer:
Sandra Nathan, Philanthropy Southwest, Dallas, TX

10:05 a.m. 1.00 hr

Top Privacy Issues for Nonprofits

Just a few years ago, companies considered information security and privacy issues to be a matter left solely for the IT department. But today, for-profit and nonprofit Boards and Executive Directors are realizing that the responsibility to protect consumer and donor data is shared across the enterprise. Learn about the trending privacy laws that all nonprofits should know about and best practices for how to comply.

Elizabeth A. Rogers, Michael Best & Friedrich LLP, Austin, TX

11:05 a.m. 1.00 hr

Demystifying Blockchain, Bitcoin, and Cryptocurrencies

Blockchain and Bitcoin are "buzzwords" of the day. Understand the essential ins and outs of blockchain technology and what it could mean to your organization.

Speaker TBD

12:05 p.m. Pick Up Lunch
Included in registration.

INSTITUTE ACCREDITATION

CLE CREDIT
This course has been approved for Minimum Continuing Legal Education credit by the State Bar of Texas Committee on MCLE in the amount of 14.50 hours, including 1.00 hour of ethics. The University of Texas School of Law is a State Bar of California approved MCLE provider (#1944), and an Oklahoma Bar Association MCLE presumptively approved provider (#169).

CPE CREDIT
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Earn up to 17.50 credits in Business Organization Management
Delivery Method: Group-Live
Program Level: Overview
Advance Preparation: None

CONCURRENT TRACKS

4B: JOINT VENTURES AND COMPLEX ORGANIZATIONAL STRUCTURES

Presiding Officer:
Andrea L. March, Texas Rio Grande Legal Aid, Austin, TX

10:05 a.m. 1.00 hr

Aggregating Capital for Good: Multi-funder Initiatives, Joint Ventures, and Fiscal Sponsors

Capital aggregation is an increasingly common strategy for funding charitable projects and initiatives. Learn about the range of models and structures, with an overview of associated legal requirements as well as practical considerations.

Megan E. Bell, Patterson Belknap Webb & Tyler LLP, New York, NY
Lisa Montez, Walton Family Foundation, Bentonville, AR

11:05 a.m. 1.00 hr

Managing Growth, Opportunity, and Business Activities: Complex Organizational Structures and Why and When to Use Them

As nonprofit organizations continue to look for ways to enhance their services, grow their operations, protect their assets, and /or develop new and self-sustaining revenue streams, the use of relational structures including subsidiaries, affiliates, and other planning structures has remained an area of interest. Consider the reasons supporting the use of a complex organizational structure, the methods and choices in establishing such a structure, and the common tax and operational issues meriting special attention.

Darren B. Moore, Bourland, Wall & Wenzel, P.C., Fort Worth, TX

12:05 p.m. **Pick Up Lunch**
Included in registration.

CONCURRENT TRACK

4C: MASTER CLASS: UBI "DEEP DIVE" (limited capacity)

10:05 a.m. 2.00 hrs

UBI "Deep Dive"

Patrick Shields, Ernst & Young LLP, Phoenix, AZ
Jacob J. Zehnder, Ernst & Young LLP, Chicago, IL

12:05 p.m. **Pick Up Lunch**
Included in registration.

FRIDAY AFTERNOON

Presiding Officer:
Presiding Officer TBD

THANK YOU TO OUR LUNCHEON PRESENTATION SPONSOR

Westwood Wealth Management®

12:35 p.m. .75 hr

Crisis Management and Communication for Nonprofits

Sometimes bad things happen to good organizations, even to nonprofits doing excellent work in their communities. It may be public accusations about financial mismanagement, sexual harassment, an act of violence, or any of the other myriad crises that can arise. How do you lead or counsel an institution in crisis when shock and paralysis have gained a foothold? Hear strategies and tactics that will assist you when the unimaginable happens.

Lisa LeMaster, The LeMaster Group, Dallas, TX

1:20 p.m. **Break**

1:35 p.m. 1.00 hr ethics

Investigations in Today's Woke Workplace

A veteran workplace investigator shares critical tips for ensuring that every complaint investigation is thorough, in good faith, and reliable in the midst of the #MeToo movement, instant social media postings, and polarizing employee relations issues.

DeDe Church, DeDe Church & Associates, LLC, Austin, TX

2:35 p.m. **Break**

CONCURRENT TRACKS

5A: COMPLIANCE ISSUES AND MORE FOR PRIVATE FOUNDATIONS

Presiding Officer:
Presiding Officer TBD

2:55 p.m. .75 hr

Protecting Against Liability: Internal Controls, Indemnification, and More

Lesley Briones, Laura and John Arnold Foundation, Houston, TX (Invited)
Caroline Waldner, Morgan, Lewis & Bockius LLP, Washington, DC

3:40 p.m. .75 hr

Top Compliance Issues and Tax Opportunities for Private Foundations

Hear a discussion of the current challenges and opportunities private foundation managers and advisors experience. Topics include tax reform changes for foundations and remaining uncertainties, grant making trends, operational challenges like employment and compensation issues, and the tensions on and benefits to a private foundation when a part of multi-entity structures.

Kelli Archibald, Ernst & Young LLP, Phoenix, AZ
Lawrence Mendenhall, Humanity United, San Francisco, CA

4:25 p.m. **Adjourn**

CONCURRENT TRACKS

5B: COMPLIANCE ISSUES AND MORE FOR PUBLIC CHARITIES

Presiding Officer:
Andrea L. March, Texas Rio Grande Legal Aid, Austin, TX

2:55 p.m. .75 hr

Managing Advocacy and Political Engagement

Emiliano Martinez, Omidyar Network, Redwood City, CA
John Pomeranz, Harmon, Curran, Spielberg + Eisenberg, LLP, Washington, DC

3:40 p.m. .75 hr

Ask the Experts: Hot Compliance Topics and Opportunities for Public Charities

Incorporating questions submitted during the course of the conference and from the audience, our experts discuss hot topics, including the complexities of shared employees among c3s and c4s and other related entities, impact investing (PRIs, pay-for-success) for public charities, and financial statement and legal implications of conditional vs. unconditional grants.

James P. Joseph, Arnold & Porter Kaye Scholer LLP, Washington, DC
Kay Walther, Blazek & Vetterling, Houston, TX

4:25 p.m. **Adjourn**

WANT TO HEAR MORE PRESENTATIONS THAN YOU CAN ATTEND?

We know you can't be in two places at once, and with so many options for great information, we've got you covered. Conference registration includes the course materials for all presentations, even the ones you can't attend. In addition, the eConference—including papers, slides, audio and CLE credit in TX and CA—will be available in "Your Briefcase" within 4–6 weeks after the conference. *PLEASE NOTE: The eConference will NOT include the Form 990-PF and the Form 990 Workshops.*

REGISTRATION FORM

Register:
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www.utcle.org/conferences/NO19
Mail:
The University of Texas School of Law
Attn. Registration
PO Box 7759
Austin, TX 78713-7759
Fax:
512.475.6876
Questions?
512.475.6700

If you have dietary requirements or would like to request accommodations under the ADA, please contact Customer Service at 512.475.6700 or service@utcle.org at least 10 business days prior to the Institute.

PLEASE PRINT CLEARLY **NP19/NO19**

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REGISTRATION

WORKSHOP—NP19 – JANUARY 16, 2019

Includes Electronic Course Materials and Wednesday Evening Reception.
eConference access is also included and available 4–6 weeks after the Institute.

Select Registration Type

- ❑ Individual registration by January 9 . . . . $175
- ❑ Individual registration after January 9 . . . . $225

Printed course binder available for an additional fee through January 9
Conference registration includes Electronic Course Binder Download (PDF) in "Your Briefcase" at www.utcle.org

- ❑ Printed Course Binder $27.06
  Price includes 8.25% Sales Tax
- ❑ Printed Course Binder for tax exempt registrants $25
  (e.g., government employees and nonprofits)

Select Workshop Concurrent Tracks, Wednesday at 1:30 p.m.
- ❑ 1A: Back to Basics: Exemption Fundamentals
- ❑ 1B: Form 990-PF Workshop (limited capacity)
- ❑ 1C: Form 990 Workshop (limited capacity)

Select Workshop Concurrent Tracks, Wednesday at 2:45 p.m.
- ❑ 2A: Back to Basics: Grantmaking and Grantseeking
- ❑ 2B: Form 990-PF Workshop (limited capacity)
- ❑ 2C: Form 990 Workshop (limited capacity)

Select Workshop Concurrent Tracks, Wednesday at 4:00 p.m.
- ❑ 3A: Back to Basics: Revenue Generating Activities
- ❑ 3B: Form 990-PF Workshop (limited capacity)
- ❑ 3C: Form 990 Workshop (limited capacity))

Select Workshop Concurrent Tracks, Wednesday at 5:15 p.m.
- ❑ 4A: Back to Basics: Impact Investing
- ❑ 4B: Form 990-PF Workshop (limited capacity)
- ❑ 4C: Form 990 Workshop (limited capacity)

Workshop Registration Total . . . . $______

INSTITUTE—NO19 – JANUARY 17–18, 2019

Includes Electronic Course Materials, Continental Breakfasts, Thursday and Friday Luncheon Presentations, and Thursday Evening Reception.
eConference access is also included and available 4–6 weeks after the Institute.

Select Registration Type

- ❑ Individual registration by January 9 . . . . $625
- ❑ Individual registration after January 9 . . . . $675

Printed course binder available for an additional fee through January 9
Conference registration includes Electronic Course Binder Download (PDF) in "Your Briefcase" at www.utcle.org

- ❑ Printed Course Binder $37.89
  Price includes 8.25% Sales Tax
- ❑ Printed Course Binder for tax exempt registrants $35
  (e.g., government employees and nonprofits)

Select Institute Concurrent Tracks, Thursday at 10:35 a.m.
- ❑ 1A: Fundraising and Restricted Gifts
- ❑ 1B: Investing Assets and Outcome Based Philanthropy
- ❑ 1C: MASTER CLASS: Violation of Chapter 42 (limited capacity)

Select Institute Concurrent Tracks, Thursday at 2:55 p.m.
- ❑ 2A: Structuring Private Foundations
- ❑ 2B: Social Impact Bonds and Entrepreneurial Activities
- ❑ 2C: MASTER CLASS: Developing a Prudent Investment Portfolio (limited capacity)

Select Institute Concurrent Tracks, Thursday at 4:35 p.m.
- ❑ 3A: Managing Private Foundation Risk
- ❑ 3B: Managing Public Charity Risk
- ❑ 3C: MASTER CLASS: Anatomy of a Grant Agreement (limited capacity)

Select Institute Concurrent Tracks, Friday at 10:05 a.m.
- ❑ 4A: Data Protection and Blockchain
- ❑ 4B: Joint Ventures and Complex Organizational Structures
- ❑ 4C: MASTER CLASS: UBI "Deep Dive" (limited capacity)

Select Institute Concurrent Tracks, Friday at 2:55 p.m.
- ❑ 5A: Compliance Issues and More for Private Foundations
- ❑ 5B: Compliance Issues and More for Public Charities

Institute Registration Total . . . . $______

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POST CONFERENCE PRODUCTS

eConference—For Texas MCLE Credit

Complete eConference package includes all conference materials for download from "Your Briefcase" at utcle.org. Available 4-6 weeks after the live conference date. MCLE hours may vary from the live conference.

WORKSHOP—NP19

- ❑ Individual eConference $125
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INSTITUTE—NO19

- ❑ Individual eConference $575
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Comprehensive binder with papers and slides from the live event. Available for delivery 4–6 weeks after conference date. Texas customers add 8.25% sales tax.

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January 16, 17–18, 2019

CONFERENCE LOCATION

Four Seasons Hotel
98 San Jacinto Blvd.
Austin, TX
512.685.8100

Special Room Rates Start at $279
good through December 21, 2018
reference "UT Law Nonprofits Institute"
(subject to availability)

Parking:
$16 daily self-parking; $18 valet
$45 overnight self or valet
(subject to change)

KEY DATES

January 9, 2019
Last day to order a printed binder

January 9, 2019
Last day for early registration
add $50 for registrations
received after this time

January 11, 2019
Last day for full refund cancellation

January 14, 2019
Last day for partial refund cancellation
$50 processing fee applied

January 16, 2019, 1:20 p.m.
Workshop begins

January 17, 2019, 8:50 a.m.
Institute begins

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