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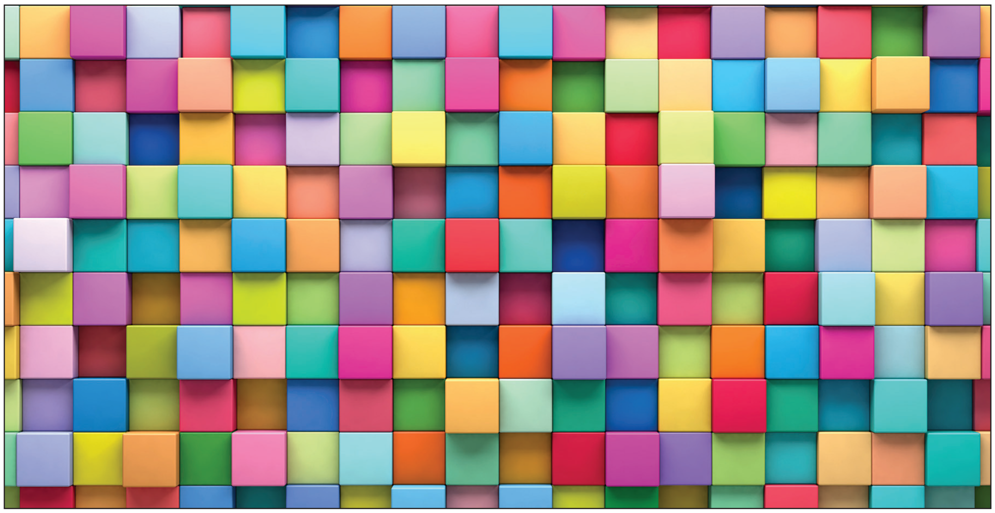

FUNDAMENTALS WORKSHOP
January 22, 2020

INSTITUTE
January 23–24, 2020

Four Seasons Hotel ▪ Austin, Texas

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Workshop—CLE Credit Hours: 4.00 hrs Approved in TX, CA, and OK (Hours Vary by Jurisdiction); CPE Credit (NASBA): 6.00 hrs (Expected)
Institute—CLE Credit Hours: 15.50 hrs | 1.00 hr ethics Approved in TX, CA, and OK (Hours Vary by Jurisdiction); CPE Credit (NASBA): 18.50 hrs (Expected)
Texas Legal Specialization Credit Approved for Estate Planning and Probate Law, and Tax Law

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2020

NONPROFIT ORGANIZATIONS FUNDAMENTALS WORKSHOP

January 22, 2020 ▪ Four Seasons Hotel ▪ Austin, Texas

Earn up to 4.00 Hours of Credit

Specialization Credit Approved for: Estate Planning and Probate Law, Tax Law

WEDNESDAY AFTERNOON, JAN. 22, 2020

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.

FUNDAMENTALS PRESENTATIONS (Main Ballroom)

Presiding Officer: Jonathan S. Blum, Polsinelli PC, Dallas, TX

LOBBYING & POLITICAL ACTIVITY AND IRS AUDIT WORKSHOPS (Small-Group Breakouts)

These workshops provide two opportunities during the day for instruction and discussion in a small-group format. Please register for the one workshop session of your choice.

1:30 p.m. 1.00 hr

The Forms 990: 990, 990-EZ, 990-N, 990-PF & 990-T
Learn how to determine which form is required to be filed based on your organization's structure and size, and discuss the differences and similarities between the forms to understand the requirements for filing.

Pam Alexanderson, Moss Adams, Albuquerque, NM
Juliette N. Voskanian, PwC, Philadelphia, PA

Lobbying and Political Campaign Activity (Public Charity Focus)
This session walks through the distinction between lobbying and political activity, and provides a better understanding of what activities are permitted and what are not.

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

Lobbying and Political Campaign Activity (Private Foundation Focus)
Explore specific strategies for private foundations to remain compliant with the private foundation rules on political activity while still making an impact on key issues.

Karl Mill, Adler & Colvin, San Francisco, CA

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

2:45 p.m. 1.00 hr

Financial Statement Essentials
Not-For-Profit entities are issuing financial statements in newly prescribed formats, with an emphasis on resource availability and comparability between entities. Understand the key items to be able to understand the financial story of the financial statements. Review the basics of NFP financials and learn how to leverage the new formats for basic analysis.

Neely D. Duncan, BKD, LLP, Dallas, TX
Sarah Loghin, BKD, LLP, Austin, TX

Lobbying and Political Campaign Activity (Public Charity Focus)
This session is identical to the previous session at 1:30 p.m. Select only one on the order form. Space is limited.

Lobbying and Political Campaign Activity (Private Foundation Focus)
This session is identical to the previous session at 1:30 p.m. Select only one on the order form. Space is limited.

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

4:00 p.m. 1.00 hr

Fiduciary Duties and Conflicts of Interest
An overview of the fiduciary duties imposed on directors of nonprofit corporations and trustees of charitable trusts under state law and the conflict of interest rules under state law and U.S. federal tax law.

Kathleen (Katie) Gerber, Thompson & Knight LLP, Dallas, TX

IRS Audit Workshop: Public Charities
Audit preparedness should be at the center of any good compliance regime. Review the basics of an IRS audit and gain practical advice on preparing for, understanding, managing, and ultimately surviving the audit process.

Christina N. Cahill, Polsinelli PC, New York, NY
Stephen M. Clarke, Ernst & Young LLP, Washington, DC

IRS Audit Workshop: Private Foundations
Audit preparedness should be at the center of any good compliance regime. Review the basics of an IRS audit and gain practical advice on preparing for, understanding, managing, and ultimately surviving the audit process.

Kurt Coburn, Blazek & Vetterling, Houston, TX
Samuel Greenberg, Ernst & Young LLP, Los Angeles, CA

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

5:15 p.m. 1.00 hr

Perspectives from Former Regulators on Charitable Oversight
Gain insight into expectations of the IRS and State Office of the Attorney General in the context of operations and management, board duties, and compliance review. Plus, hear tips on communicating positively and effectively on behalf of nonprofit organizations.

Chelsea R. Rubin, Morgan, Lewis & Bockius LLP, Washington, DC
Susan K. Staricka, Staricka Law, PLLC, Austin, TX

IRS Audit Workshop: Public Charities
This session is identical to the previous session at 4:00 p.m. Select only one on the order form. Space is limited.

IRS Audit Workshop: Private Foundations
This session is identical to the previous session at 4:00 p.m. Select only one on the order form. Space is limited.

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

WELCOME RECEPTION

6:15 p.m. – 7:15 p.m.

Join us for a networking opportunity with faculty and colleagues.

THURSDAY MORNING, JAN. 23, 2020

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

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

8:35 a.m. **Welcoming Remarks**

8:45 a.m. **1.25 hrs**

A View of the Sector: Implementing Tax Reform for Tax-Exempt Organizations
The IRS and Treasury have issued preliminary guidance on several provisions of the Tax Cuts and Jobs Act of 2017 affecting exempt organizations, but both the legislation and the guidance pose many interpretive and operational challenges. Explore how, two years after the Act's passage, organizations are responding to the preliminary guidance from the IRS and Treasury, and how implementation of the legislation may continue to progress in the coming year.

Alexander L. Reid, Morgan, Lewis & Bockius LLP, Washington, DC
Carolyn O. "Morey" Ward, Ropes & Gray LLP, Washington, DC

10:00 a.m. **Break**

CONCURRENT TRACKS

TRACK A: ELECTION YEAR ISSUES: PUBLIC CHARITIES

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

10:20 a.m. **.75 hr**

What You Need to Know to Get Through the 2020 Election
Gain insight on how to help your 501(c)(3) continue to pursue its mission without violating the prohibition against political campaign intervention in the upcoming elections. Ongoing issue advocacy, voter activation efforts, social media communications, personal political activity by board and staff members – all are possible, but present potential pitfalls that you need to know how to avoid.

Irina Petrova, Natural Resources Defense Council, New York, NY
John Pomeranz, Harmon, Curran, Spielberg + Eisenberg, LLP, Washington, DC
Douglas N. Varley, Caplin & Drysdale, Chartered, Washington, DC

11:05 a.m. **.75 hr**

Multi-organization Structures for Advocacy: 501(c)(3)s, 501(c)(4)s, PACs, etc.
Achieving your policy and political goals might require using different types of organizations—a 501(c)(3) educational arm, a 501(c)(4) to engage in more lobbying and political activity, and maybe more. Learn how to structure a multifaceted advocacy program that complies with tax law and campaign finance law.

Irina Petrova, Natural Resources Defense Council, New York, NY
John Pomeranz, Harmon, Curran, Spielberg + Eisenberg, LLP, Washington, DC
Douglas N. Varley, Caplin & Drysdale, Chartered, Washington, DC

11:50 a.m. **Pick Up Lunch**
Included in registration.

CONCURRENT TRACKS

TRACK B: PRIVATE FOUNDATION COMPLIANCE: TAXABLE EXPENDITURES

Presiding Officer:
Norman E. Nabhan, Graystone Consulting, Houston, TX

10:20 a.m. **.75 hr**

Funding and Conducting Advocacy: Flashpoints for Private Foundations
Hear the key legal considerations for private foundations that are involved in conducting or funding advocacy. These include the IRS lobbying rules, other federal and state lobbying rules, personal versus professional activities of staff, and special considerations around elections.

Kimberly Eney, Latham & Watkins LLP, Washington, DC
Elizabeth Peters, The William and Flora Hewlett Foundation, Menlo Park, CA

11:05 a.m. **.75 hr**

Taxable Expenditure Flashpoints
Managing private foundation expenditures is not always intuitive. Despite charitable intentions, funding entities other than public charities require Expenditure Responsibility steps which are often missed. Even if a foundation thinks it is maintaining ER and evidence of charitable nature of its spending, missteps result in a taxable expenditure and excise tax can be imposed. How a foundation properly corrects such missteps is challenging and needed to avoid the second tier tax.

Kelli Archibald, Ernst & Young LLP, Phoenix, AZ
Jody Blazek, Blazek & Vetterling, Houston, TX

11:50 a.m. **Pick Up Lunch**
Included in registration.

CONCURRENT TRACKS

MASTER CLASS: UNDERSTANDING YOUR WEB PRESENCE (LIMITED CAPACITY)

10:20 a.m. **1.50 hrs**

Understanding Your Web Presence
What is "web presence" and why does it matter? Discuss what web presence is and isn't, how nonprofits are using web presence to advance their missions, and how to assess your organization's risks in this area.

Lawrence Mendenhall, American Academy of Ophthalmology and AAO Foundation, San Francisco, CA
Sandro Serra, Pillsbury Winthrop Shaw Pittman LLP, Austin, TX

11:50 a.m. **Pick Up Lunch**
Included in registration.

THURSDAY AFTERNOON

Presiding Officer:
Tony Fundaro, Philanthropy Southwest, Dallas, TX

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NORTHERN TRUST

12:20 p.m. **.75 hr**

Nonprofits in the News: Reporters Reveal What We See and What We Look For
Attracting media attention can enable nonprofits to heighten awareness of and raise money to support mission. As a watchdog of nonprofits, the press can also expose an organization to scrutiny for which it is not prepared. Hear advice from veteran journalists on how to handle the media and experience successful interactions with the press.

Moderator:
Karey Dubiel Dye, Goldman Sachs Philanthropy Fund, Houston, TX

Panelists:
Tom Hamburger, The Washington Post, Washington, DC
Ross Ramsey, The Texas Tribune, Austin, TX

1:05 p.m. **Break**

1:20 p.m. 1.00 hr

Panel Discussion: State Attorney General Offices

Gain insight into best practices from a panel of state assistant attorneys general discussing current enforcement issues, priorities, and other oversight considerations.

Moderator:
Jason R. Lilien, Loeb & Loeb LLP, New York, NY

Panelists:
Michael T. Foerster, Pennsylvania Office of Attorney General, Harrisburg, PA
Mary T. Henderson, Office of the Attorney General of Texas, Austin, TX
Malisa McPherson, Office of Oklahoma Attorney General, Oklahoma City, OK

2:20 p.m. Break

CONCURRENT TRACKS

TRACK C: DATA PROTECTION / DAFs

Presiding Officer:
Jeffrey E. Sher, Fizer Beck, Houston, TX

2:40 p.m. .75 hr

GDPR and What Else Is On Our Minds: A Look at Data Protection and Cybersecurity in 2020

Examine issues related to data privacy and security, including GDPR. Learn about the latest cybersecurity threats and trends impacting nonprofits, and actions that can be taken today in furtherance of compliance and in support of the overall data privacy and security mission.

John E. Ansbach, Stroz Friedberg, Dallas, TX

3:25 p.m. .75 hr

Donor Advised Funds: Issues, Challenges, Opportunities?

Donor Advised Funds (DAF), have become go-to vehicles for philanthropy. Moving beyond the "charitable checkbook," they are increasingly being used as part of innovative charitable giving strategies, for multi-entity/multi-funder initiatives, and to align grants and investments geared to catalyze and mobilize capital for good. Explore issues and considerations, both legal and practical, implicated by complex DAF transactions and relationships, including contributions of illiquid (or less liquid) assets, the growing interest in impact investing, and donor roles and involvement and ongoing positive and negative perception of DAFs

Jonathan S. Blum, Polsinelli PC, Dallas, TX
Melanie Schnoll Begun, Morgan Stanley, New York, NY

4:10 p.m. Break

CONCURRENT TRACKS

TRACK D: DISQUALIFIED PERSONS AND QUALIFYING DISTRIBUTIONS

Presiding Officer:
Tony Fundaro, Philanthropy Southwest, Dallas, TX

2:40 p.m. .75 hr

Disqualified Person Are (Often) Challenging

Explore the Chapter 42 excise tax regime applicable to private foundations and the key role disqualified persons play in exposure to self-dealing and excess business holdings. Consider the basics in mapping disqualifying persons as well as best practices for managing compliance and risks.

Nishka Chandrasoma, Ford Foundation, New York, NY
Michelle Michalowski, PwC, Washington, DC

3:25 p.m. .75 hr

Rethinking / Revisiting Qualifying Distributions

How are different sized and different types of private foundations thinking about and planning to meet minimum distribution requirements in a potentially low return environment? Examine the impact of volatile markets, and the increased needs from grantees on foundations. How do the competing interests intersect and impact the foundation's life plans if there is a perpetuity plan? What counts as a qualifying distribution when private foundations collaborate to co-fund projects by pooling resources and other interesting qualifying distribution questions?

Virginia C. Gross, Polsinelli PC, Kansas City, MO
Jane M. Searing, Deloitte, Seattle, WA

4:10 p.m. Break

CONCURRENT TRACKS

MASTER CLASS: INVESTMENT POLICIES AND PORTFOLIOS (limited capacity)

2:40 p.m. 1.50 hrs

Investment Policies and Fiduciary Duties

Discussion of how foundations and endowments should consider asset allocation, spending policy, and advisory relationships within the context of fiduciary duties and spending requirements.

Catherine Lee Clarke, Hirtle, Callaghan & Co., LLC, Houston, TX
Tina Lundy Melo, Fizer Beck, Houston, TX

4:10 p.m. Break

CONCURRENT TRACKS

TRACK E: COLLABORATIONS AND UBIT

Presiding Officer:
Jeffrey E. Sher, Fizer Beck, Houston, TX

4:20 p.m. 1.00 hr

Collaborations – A Broader View

As the philanthropic and charitable sector continues to explore how to leverage resources and achieve greater impact, collaboration continues to be an important tool. Many funders have deep experience with funder collaboratives, while others are experimenting with a broader menu of collaboration options. Identify a variety of collaboration models and introduce issues to consider.

Hillary Bounds, Chan Zuckerberg Initiative, Redwood City, CA
Andrew Schulz, Arabella Advisors, Washington, DC

5:20 p.m. 1.00 hr

UBTI Therapy Session: Practical Approaches to Tax Reform and UBTI Compliance

UBIT compliance has become much more challenging post-tax reform. Focus on practical methods of addressing those challenges, including obtaining expenses and gathering other data associated with employee parking, separating UBTI into silos, and finding offsets to mitigate additional UBIT.

Ray Bunyard, Baylor Scott & White Health, Dallas, TX
Justin J. Lowe, Ernst & Young LLP, Washington, DC

6:20 p.m. Adjourn to Reception

CONCURRENT TRACKS

TRACK F: EFFECTIVE GRANTMAKING AND CORPORATE FOUNDATIONS

Presiding Officer:
Tony Fundaro, Philanthropy Southwest, Dallas, TX

4:20 p.m. 1.00 hr

Better Grantmaking: Balancing Risk and Equity

How do we create a grantmaking process that manages risk without becoming overly burdensome for our grantees? What kind of process do we create when we use an equity lens? And how do we balance the two? This session will focus on issues including identifying and managing risk, simplifying the process for your (program staff and) grantees while maintaining the necessary level of compliance and ensuring there is a good internal process to deal with the unexpected. Think that's impossible? Come learn practical ways to make that happen.

Kathleen Flynn, New Venture Fund, Washington, DC
Megan Jellinek, Chan Zuckerberg Initiative, Redwood City, CA

5:20 p.m. 1.00 hr

Corporate Foundations: Strategies to Make Them Work—Both For You and With You

In addition to focusing on the pros and cons of forming a corporate foundation, examine what strategies and factors corporate foundations consider when identifying which nonprofits to support.

J. Reymundo Ocañas, BBVA USA, Houston, TX
Nicola Fuentes Toubia, Fuentes Toubia, PLLC, Houston, TX

6:20 p.m. Adjourn to Reception

CONCURRENT TRACKS

MASTER CLASS: CHARITABLE GIVING AND ENDOWMENTS (limited capacity)

4:20 p.m. 2.00 hrs

The Law and Lore of Endowment Funds: A 21st Century Edition

A practical guide to some of the issues involved in structuring endowment gifts and administering institutional endowments. Gain insight on endowment gift agreements, endowment spending policies, and the documentation of endowment investment and spending decisions.

John Sare, Patterson Belknap Webb & Tyler LLP, New York, NY

6:20 p.m. Adjourn to Reception

THANK YOU TO OUR RECEPTION SPONSOR

Frost BANKING INVESTMENTS INSURANCE

6:20 p.m. – 7:20 p.m.

Join us for a networking opportunity with faculty and colleagues.

FRIDAY MORNING, JAN. 24, 2020

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

7:30 a.m. Conference Room Opens

Includes continental breakfast.

CONCURRENT TRACKS

TRACK G: TX LEGISLATIVE UPDATE AND YEAR IN REVIEW

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

8:00 a.m. .75 hr

Texas Legislative Update 2019

Bills and policy trends in the 2019 Texas legislative session will impact nonprofit organizations, state associations, foundations and social service groups in various ways. Two veteran observers of the Texas public policy and political scene will present a timely review of statutory, regulatory, and legislative developments of interest.

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 2020 program letter and current Priority Guidance Plan, application of the commerciality doctrine, and recent law developments concerning qualification for tax exemption, the private inurement and private benefit doctrine, and much more.

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

9:45 a.m. Break

CONCURRENT TRACKS

MASTER CLASS: ENTREPRENEURSHIP AND COMMERCIALITY (limited capacity)

8:00 a.m. 1.75 hrs

The Tapestry of Strategically (and Legally) Using Commercial Enterprises to Achieve Charitable Ends

Opportunities for exempt organizations to work with and through market-oriented enterprises and interventions to pursue their charitable purposes are increasing. Strategically balancing charitability, private benefit, tax considerations, structures and forms, licensing, data, decision-making, assessments, and more are among the inter-related threads that run through these approaches. Instead of hanging loosely, these threads together create a tapestry of strategic decisions and opportunities.

Tomer Inbar, Patterson Belknap Webb & Tyler LLP, New York, NY
John Tyler, Ewing Marion Kauffman Foundation, Kansas City, MO

9:45 a.m. Break

CONCURRENT TRACKS

TRACK H: EMPLOYEE ISSUES

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

10:05 a.m. 1.00 hr

Advanced Compensation and Benefits Issues

When a nonprofit organization receives services from an individual who is employed by a related organization, whether nonprofit or for-profit, it can be complicated to determine the applicable employment tax requirements and the permissible benefits arrangements. Review the current state of guidance on section 4960 as well as complex employment tax and benefits issues associated with shared employment, including common paymasters, reporting agents, and FUTA.

Catherine E. Livingston, Jones Day, Washington, DC
Maura L. Whelan, Simpson Thacher & Bartlett LLP, New York, NY

11:05 a.m. 1.00 hr

Avoiding Labor Pains

Hear hot topics addressing compliance with employment laws such as trends in leave policies, LGBTQUI rights, telecommuting and post-FMLA leave accommodations, legalized marijuana and drug screens, recently effective wage and hour regulations, and more.

Connie L. Cornell, Cornell Smith Mierl Brutocao Burton, LLP, Austin, TX

12:05 p.m. Pick Up Lunch

Included in registration.

CONCURRENT TRACKS

TRACK I: IMPACT INVESTING AND ACCOUNTING STANDARDS

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

10:05 a.m. 1.00 hr

Not Your Grandmother's Impact Investing

The field of impact investing continues to expand and provide an increasingly wide range of opportunities for nonprofit organizations looking to sync their mission and their investments. Take a look at a diverse range of impact investment options, including social impact funds, charitable note programs, SAFEs, pay-for-performance transactions, and opportunity zones. Explore different investment opportunities and legal issues to consider for different types of nonprofit investors.

David A. Levitt, Adler & Colvin, San Francisco, CA
Darren B. Moore, Bourland, Wall & Wenzel, P.C., Fort Worth, TX

11:05 a.m. 1.00 hr

The Accounting Standards Are Not Just For the Accountants Any More

Generally accepted accounting principles (GAAP) determine whether, when, and how contributions are recognized in the accounting records and financial statements. Accounting for contributions can be significantly influenced by how resources are solicited and documented by donors and nonprofit organizations. Donors, development professionals and accountants need to understand how to assist each other so we're all "rowing in the same direction" to serve the needs of the not-for-profit community. Hear an overview of the new accounting rules for contributions (Accounting Standards Update (ASU) 2018-08, Not-for-Profit Entities (Topic 958): Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made) and a discussion of the adoption of the new Financial Reporting Disclosures for Operating Liquidity.

Amy B. Robinson, The Kresge Foundation, Troy, MI
Kay Walther, Blazek & Vetterling, Houston, TX

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

CONCURRENT TRACKS

MASTER CLASS: DISSECTING THE GRANT AGREEMENT (limited capacity)

10:05 a.m. 2.00 hrs

Dissecting the Grant Agreement

Review the key components of a grant agreement, including provisions unique to private foundations, considerations for advocacy organizations, and how to structure grants to fiscal sponsors, non-charitable organizations, and individuals. Expect practical advice from the perspective of both the grantor and the grantee, a lively discussion, and sample language.

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

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

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 Wednesday Lobbying and Political Activity Workshops or the Wednesday IRS Audit Workshops.*

FRIDAY AFTERNOON

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

LUNCHEON PRESENTATION

12:35 p.m. .75 hr

Giving Circles and Other Philanthropic Networks

The number of giving circles have quadrupled in the last decade with women making up 70% of giving circles. Hear from Texas Women's Foundation, a leader in this space, and the founders of two successful giving circles in Texas, on the advantages and key considerations in bringing together individuals with shared experience, culture or interest to raise money and engage your donors.

Moderator:
Dawn Hooper, Texas Women's Foundation, Dallas, TX

Panelists:
A. Shonn Brown, Kimberly-Clark Corporation, Irving, TX
Caren K. Lock, TIAA, Lewisville, TX

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

1:35 p.m. 1.00 hr ethics

Ethical Challenges for the Nonprofit Organizations Advisor

Meghan R. Biss, Caplin & Drysdale, Chartered, Washington, DC
Bridget M. Weiss, Arnold & Porter Kaye Scholer LLP, Washington, DC

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

CONCURRENT TRACKS

TRACK J: PUBLIC CHARITIES: HUMANITARIAN ACTIVITIES AND "OFFICE HOURS"

Presiding Officer: Danika Hudik Mendrygal, Mendrygal Law, PLLC, Dallas, TX

2:55 p.m. 1.00 hr

Legal Challenges in the Provision of Humanitarian Assistance to Refugees, Asylees, and Migrants

Providing humanitarian assistance to refugees, asylees, and migrants in the United States and around the world generally has become increasingly challenging thanks to laws and policies adopted by governments hostile to the arrival of such individuals in their countries. Organizations seeking to assist these populations must navigate the ever changing legal landscape in multiple jurisdictions and find ways to continue providing needed assistance to the world's most vulnerable populations.

Ricardo A. Castro, International Rescue Committee, New York, NY
Jonathan Denis Ryan, RAICES, San Antonio, TX

3:55 p.m. 1.00 hr

"Office Hours" - Key Issues and Questions Facing Public Charities

Gain insight on key issues and common challenges facing public charities, and share your own questions with conference faculty and fellow colleagues in this interactive session.

Megan E. Bell, Patterson Belknap Webb & Tyler LLP, New York, NY
James P. Joseph, Arnold & Porter Kaye Scholer LLP, Washington, DC

4:55 p.m. **Adjourn**

CONCURRENT TRACKS

TRACK K: PRIVATE FOUNDATIONS: ISSUES IN CHARITABILITY AND "OFFICE HOURS"

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

2:55 p.m. 1.00 hr

Advanced Issues in Charitability: Food, Energy and the Environment (and then there is Education)

In an increasingly complex world, charities are frequently called upon to address newer and more pressing challenges. Explore the contours and frontiers of charitability as applied to food, energy, the environment, and education—all areas where the boundaries of charitability can blur—and discuss how charities can navigate the legal landscape surrounding these topics.

Edward T. Chaney, Schell Bray PLLC, Chapel Hill, NC
Lauren Simpson, Patterson Belknap Webb & Tyler LLP, New York, NY

3:55 p.m. 1.00 hr

"Office Hours" - Key Issues and Questions Facing Private Foundations

Gain insight on key issues and common challenges facing private foundations, and share your own questions with conference faculty and fellow colleagues in this interactive session.

Ruth M. Madrigal, KPMG LLP, Washington, DC
David A. Shevlin, Simpson Thacher & Bartlett LLP, New York, NY

4:55 p.m. **Adjourn**

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CONFERENCE REGISTRATION

LIVE EVENT REGISTRATION

Special group registration rates available. Call 512.475.6700

Nonprofit Workshop Registration
Includes Electronic Course Materials and Wednesday Evening Reception

❑ Individual registration by Wednesday, January 15 . . . . $195
❑ Individual registration after Wednesday, January 15 . . . . $245

Select Workshop Concurrent Tracks, Wednesday at 1:30 p.m. - SELECT ONE
❑ Fundamentals: The Forms 990
❑ Political Activity Workshop: Public Charities (limited capacity)
❑ Political Activity Workshop: Private Foundations (limited capacity)

Select Workshop Concurrent Tracks, Wednesday at 2:45 p.m. - SELECT ONE
❑ Fundamentals: Financial Statements
❑ Political Activity Workshop: Public Charities (limited capacity)
❑ Political Activity Workshop: Private Foundations (limited capacity)

Select Workshop Concurrent Tracks, Wednesday at 4:00 p.m. - SELECT ONE
❑ Fundamentals: Fiduciary Duties
❑ IRS Audit Workshop: Public Charities (limited capacity)
❑ IRS Audit Workshop: Private Foundations (limited capacity)

Select Workshop Concurrent Tracks, Wednesday at 5:15 p.m. - SELECT ONE
❑ Fundamentals: Oversight in the Charitable Sector
❑ IRS Audit Workshop: Public Charities (limited capacity)
❑ IRS Audit Workshop: Private Foundations (limited capacity)

Nonprofit Workshop Printed Binder – Available Through Wednesday, January 15
Conference registration includes Electronic Course Binder Download (PDF) in "Your Briefcase".

❑ Printed Course Binder $27.06 ($25*)

Nonprofit Workshop Registration Total . . . . $__________

NOTE: Registrants may be placed in an available track if their selection is at capacity at the time of registration.

Nonprofit Institute Registration
Includes Electronic Course Materials and Friday Luncheon Presentation

❑ Individual registration by Wednesday, January 15 . . . . $645
❑ Individual registration after Wednesday, January 15 . . . . $695

Select Institute Concurrent Tracks, Thursday at 10:20 a.m.
❑ A: Election Year Issues: Public Charities ❑ B: Private Foundation Compliance
❑ MASTER CLASS: Understanding Your Web Presence (limited capacity)

Select Institute Concurrent Tracks, Thursday at 2:40 p.m.
❑ C: Data Protection / DAFs ❑ D: Disqualified Persons and Qualifying Distributions
(SOLD OUT) MASTER CLASS: Investment Policies and Portfolios (limited capacity)

Select Institute Concurrent Tracks, Thursday at 4:20 p.m.
❑ E: Collaborations and UBIT ❑ F: Effective Grantmaking and Corporate Foundations
(SOLD OUT) MASTER CLASS: Charitable Giving and Endowments (limited capacity)

Select Institute Concurrent Tracks, Friday at 8:00 a.m.
❑ G: TX Legislative Update and Year in Reviews
(SOLD OUT) MASTER CLASS: Entrepreneurship and Commerciality (limited capacity)

Select Institute Concurrent Tracks, Friday at 10:05 a.m.
❑ H: Employee Issues ❑ I: Impact Investing and Accounting Standards
(SOLD OUT) MASTER CLASS: Dissecting the Grant Agreement (limited capacity)

Select Institute Concurrent Tracks, Friday at 2:55 p.m.
❑ J: Public Charities: Humanitarian Activities and "Office Hours"
❑ K: Private Foundations: Issues in Charitability and "Office Hours"

Nonprofit Institute Printed Binder – Available Through Wednesday, January 15
Conference registration includes Electronic Course Binder Download (PDF) in "Your Briefcase".

❑ Printed Course Binder $37.89 ($35*)

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Nonprofit Workshop eConference – For Texas and California MCLE Credit
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❑ Nonprofit Institute eConference $595

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Accommodations:
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(subject to availability)

Parking:
$16 daily self-parking; $18 daily valet
$35 overnight valet parking
(subject to change)

KEY DATES

January 15, 2020
Last day to order a printed binder

January 15, 2020
Last day for early registration
Add $50 for registrations
received after this time

January 15, 2020
Last day for full refund cancellation

January 17, 2020
Last day for partial refund cancellation
$50 processing fee applied

January 22, 2019, 1:20 p.m.
Workshop Begins

January 23, 2019, 8:50 a.m.
Institute Begins

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