36th Annual
CONFERENCE ON NOT-FOR-PROFIT ORGANIZATIONS
EASY WAYS TO REGISTER

ONLINE
cle.kentlaw.edu

PHONE
312.906.5090

MAIL
Office of CLE
Chicago-Kent College of Law
565 W. Adams Street
Chicago, IL 60661-3691
36th Annual
CONFERENCE ON NOT-FOR-PROFIT ORGANIZATIONS

You will have personal access to nationally recognized experts in the not-for-profit field who provide a comprehensive update on the cutting-edge legal, legislative, and policy developments that impact non-profit organizational planning. Concentrated succinctly into a one-day conference, get hands-on practical knowledge, 6.75 hours of CLE credit, and 8.0 hours of CPE credit.

CONFERENCE AT A GLANCE

8:00am–8:40am
Registration

8:40am–8:45am
Welcome

8:45am–9:45am
Opening Plenary Address
Exempt Organizations Update

9:45am–10:45am
IRS Audit Hot Topics

10:45am–11:00am
Break

11:00am–12:00pm
Concurrent Sessions
- Audit and Accounting Update
- Intellectual Property Basics for Non-Profits
- Fiscal Sponsorships and Alliances

12:00pm–12:30pm
Buffet Luncheon

12:30pm–1:15pm
Luncheon Sessions
- Managing Restricted Funds and Managing an Endowment
- Managing a Board of Directors
- Employment Law Issues in a Time of Change

1:15pm–1:30pm
Break

1:30pm–2:30pm
Concurrent Sessions
- Lawyer Dilemmas for an Electronic Age: Online Reputation Concerns, Marketing, and the Provision of Legal Services
- Healthy Controls for Healthy Organizations
- State and Local Tax Exemption Issues

2:30pm–2:45pm
Break

2:45pm–3:45pm
Concurrent Sessions
- IL Attorney General’s Charitable Trust Bureau Update
- The How and Why of Advocacy for Tax-Exempt Organizations
- Legislative Update

3:45pm–4:00pm
Break

4:00pm–5:00pm
Are the Risks Real?

This conference is presented in cooperation with Forefront

Forefront
Engaging for impact
CONFERENCE FACULTY

OPENING PLENARY SPEAKER
Margaret Von Lienen
Acting Director of Exempt Organizations
Internal Revenue Service

Jason M. Baxendale
Chief Development Officer
The Chicago Community Trust

Mark R. Davis
Equity Member
O’Keefe, Lyons, Hynes LLC

John T. Bomher
Senior Vice President and Counsel Government Relations & Policy
Illinois Health & Hospital Association

Kim Dean
Manager, Forensic & Valuation Services
Plante Moran PLLC

Andreason L. Brown
Executive Vice President and Chief Financial Officer
Forefront

Mark Deaton
Senior Vice President and General Counsel
Illinois Health & Hospital Association

Justice Cassel
Information Security Consultant
Cisco Security Solutions

Katy Detman
Principal, Enterprise Risk Services
Plante Moran PLLC

Thomas E. Chomicz
Consultant

Mark Dyckman
General Counsel
Illinois Department of Revenue

Michael A. Clark
Partner
Sidley Austin LLP

Jomarie B. Fredericks
Deputy General Counsel and Chief Intellectual Property Counsel
Rotary International
8:00am-8:40am
Registration

8:40am-8:45am
Welcome

8:45am-9:45am
OPENING PLENARY ADDRESS
Exempt Organizations Update
EO Acting Director Margaret Von Lienen will be discussing the EO topics of current interest including the most recent changes within the IRS TE/GE division and current IRS EO initiatives.
Margaret Von Lienen, Acting Director of Exempt Organizations, Internal Revenue Service

9:45am-10:45am
IRS Audit Hot Topics
IRS audits of non-profits are up and the same issues are being raised over and over. Get prepared now for ways to better your position before the notice of audit comes in.
Paula Cozzi Goedert, Partner, Barnes & Thornburg LLP

10:45am-11:00am
Break

11:00am-12:00pm
CONCURRENT SESSIONS
Audit and Accounting Update
This session will discuss recent accounting and audit developments of interest to not-for-profit organizations. It will also review ongoing FASB projects that could have a significant impact on non-for-profit accounting and financial reporting.
Craig Wories, Partner, RSM US LLP

Intellectual Property Basics for Non-Profits
Non-profits have intellectual property to protect, just like for-profit consumer products companies. This session will cover the basics of intellectual property protection, with a view toward types of protection available to non-profits, especially on a limited budget.
Jomarie B. Fredericks, Deputy General Counsel, Chief Intellectual Property Counsel, Rotary International

Fiscal Sponsorships and Alliances
This session will explore the various roles that fiscal sponsors can play on behalf of a sponsored organization or program and why a fiscal sponsor would be used. Different types of fiscal sponsorships, legal responsibilities of the sponsor and sponsored organization, and challenges these arrangements can pose will all be covered.
Andreason L. Brown, Executive Vice President and Chief Financial Officer, Forefront
Norah L. Jones, Partner, Quarles & Brady LLP

12:00pm-12:30pm
Box Lunch Pick-Up

12:30pm-1:15pm
LUNCHEON SESSIONS
Managing Restricted Funds and Managing an Endowment
A review of the laws governing the definition and use of restricted funds, and allowing the modification of those restrictions, and a review of the laws governing the definition and use of endowment funds, particularly the Illinois Uniform Prudent Management of Institutional Funds Act.
James R. Hellige, Partner, Foley & Lardner LLP
Richard L. Sevcik, Partner, Perkins Coie LLP

Managing a Board of Directors
Are Directors managers, overseers, mere donors, boosters, captives of the staff, or monitors of the quality of the product or service? We will host an audience participation discussion of board issues.
Thomas E. Chomicz, Consultant
Philip N. Hablutzel, Professor of Law Emeritus and Director of the Institute of Illinois Business Law, Chicago-Kent College of Law

Employment Law Issues in a Time of Change
This session will focus on the most notable recent employment law decisions and the current challenges facing employees with respect to the issues of employing visa holders, green card holders, and illegal immigrants. Attendees are encouraged to raise the issues that most concern their businesses.
Richard J. Gonzalez, Director of Clinical Legal Education and CK Law Group Employment Law Section, Chicago-Kent College of Law

1:15pm-1:30pm
Break
1:30pm-2:30pm

CONCURRENT SESSIONS

Lawyer Dilemmas for an Electronic Age: Online Reputation Concerns, Marketing & the Provision of Legal Services

A significant body of lawyer regulatory case law is developing that deals with the use and misuse of 21st century technology. This program explores the latest disciplinary and professional responsibility trends involving electronic communications. A number of different substantive topics, everything from confidentiality, web-based lawyer referrals, the unauthorized practice of law, online representational concerns, and marketing issues are explored, all within the context of the Illinois Rules of Professional Conduct.

James J. Grogan, Deputy Administrator & Chief Counsel, Illinois Attorney Registration and Disciplinary Commission

Healthy Controls for Healthy Organizations

- Learn about the controls for protecting key information for your organization and your client
- Listen to stories of what happens when controls fail or are ignored
- Understand how to address weaknesses in yours and your client’s control environment

Kim Dean, Manager, Forensic & Valuation Services, Plante Moran PLLC
Katy Dettman, Principal, Enterprise Risk Services, Plante Moran PLLC

State and Local Tax Exemption Issues

A panel discussion providing an update on recent reviewing court decisions on property tax exemption applications by hospitals and their affiliates, and the impact of these decisions on hospital exemption applications and property tax exemption generally.

Mark R. Davis, Equity Member, O’Keefe, Lyons & Hynes LLC
Mark Dyckman, General Counsel, Illinois Department of Revenue
Floyd D. Perkins, Partner, Nixon Peabody LLP

2:30pm-2:45pm

Break

2:45pm-3:45pm

CONCURRENT SESSIONS

Illinois Attorney General’s Charitable Trust Bureau Update

- Compliance and reporting requirements
- Litigation matters and concerns

- Myths and misconceptions about filings with the Attorney General’s Office

Moderator: Floyd D. Perkins, Partner, Nixon Peabody LLP
Therese Harris, Chief, Charitable Trust Bureau, Office of the IL Attorney General

The How and Why of Advocacy for Tax-Exempt Organizations

This session will explore why exempt organizations may wish to engage in advocacy and offer practical tips for influencing policy at the state and federal levels. Relevant lobbying registration/disclosure rules and requirements for maintaining tax-exempt status while engaging will also be presented.

Michael A. Clark, Partner, Sidley Austin LLP
Dawn Melchiorre, Vice President, Member Engagement, Forefront
Adrienne J. Olson, Partner, Quarles & Brady LLP

Legislative Update

This session will discuss key legislative and regulatory developments in the nonprofit sector over the past year and important ongoing legislative and regulatory initiatives, including federal health care reform efforts and the ripple effect for state health care funding.

Jason M. Baxendale, Chief Development Officer, The Chicago Community Trust
John T. Bomher, Senior Vice President and Counsel for Government Relations and Policy, Illinois Health and Hospital Association
Mark Deaton, Senior Vice President and General Counsel, Illinois Health and Hospital Association
Gerald M. Griffith, Partner, Jones Day

3:45pm-4:00pm

Break

4:00pm-5:00pm

Are the Risks Real?

This panel will address business cyber security risks:

- A Technologist Perspective: Dispense with abstract notions of hacking threats. Hear relevant viewpoints from an enterprise and penetration tester’s point of view, as well as that of a black-hat, non-standard malicious attacker.
- An Attorney’s Perspective: Are you prepared to respond to a data breach or other cyber attack? Hear an attorney’s perspective on methods for dealing with an actual breach, including legal remedies available for data breaches and intrusions

Justice Cassel, Information Security Consultant, Cisco Security Solutions
### UPCOMING CLE CONFERENCES

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<th>Event</th>
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<td>April 20-21, 2017</td>
<td>34th Annual Section 1983 Civil Rights Litigation Conference</td>
<td>11.25 hours of IL MCLE credit</td>
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<tr>
<td>April 27, 2017</td>
<td>#CKNow: Law, Democracy, and the Right to Vote (free!)</td>
<td>2.0 hours of IL MCLE credit</td>
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<tr>
<td>May 18, 2017</td>
<td>36th Annual Federal Tax Institute</td>
<td>8.0 hours of IL MCLE credit, 9.5 hours IL CPE credit</td>
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<td>June 15, 2017</td>
<td>Annual Business Valuation Symposium: A Guide to the Changing Legal Environment (in collaboration with IICLE &amp; Mazars USA)</td>
<td>4.0 hours of IL MCLE credit</td>
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<td>September 14, 2017</td>
<td>35th Annual Federal Sector Labor Relations &amp; Labor Law Conference</td>
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<tr>
<td>November 3, 2017</td>
<td>9th Annual Conference on Futures &amp; Derivatives</td>
<td>IL MCLE credit &amp; IL CPE credit to be determined</td>
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<tr>
<td>December 1, 2017</td>
<td>33rd Annual Illinois Public Sector Labor Relations Law Conference</td>
<td>IL MCLE credit to be determined</td>
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### WHO SHOULD ATTEND THE NFP CONFERENCE?

- Experienced Attorneys
- Experienced Accountants
- Experienced Not-For-Profit Organization Administrators & Staff
- Experienced Advisors of Not-For-Profit Organizations

### WHY ATTEND?

As an experienced practitioner you won’t want to miss this hands-on, immediately relevant, intermediate to masters’ level seminar.

You will:

- Hear directly from the most prominent firm heads and government experts in the field
- Interact directly with each panel during Q&A
- Connect and learn from your industry peers

“Very, very good. Speakers are engaging, practical, and welcomed audience participation.” – Previous Attendee
Get in front of your target audience when you confirm your support as a session sponsor. Be everyone’s favorite phrase when you become a Wi-Fi sponsor. These are just a couple of the opportunities available at this conference and others throughout the year. Contact Kelly Calvanico, CLE Director, at 312.906.5091 or kcalvani@kentlaw.iit.edu for further information.

The Graduate Program in Taxation at Chicago-Kent College of Law is designed to meet the needs of full-time, part-time, or non-degree students seeking the best in both a theoretical and practical graduate tax education. The program faculty are partners in major Chicago law firms, attorneys in the tax groups of national accounting firms, and full-time Chicago-Kent faculty. Classes offer in-depth knowledge of tax issues involved in business and financial transactions and the skills necessary to plan the transactions by faculty routinely involved in planning, resolving and litigating critical tax issues.

For more information, please contact the Office of Graduate Admissions at (312) 906-5360 or send an email to admissions@kentlaw.iit.edu.

INTERESTED IN SPONSORSHIP OPPORTUNITIES?

Get in front of your target audience when you confirm your support as a session sponsor. Be everyone’s favorite phrase when you become a Wi-Fi sponsor. These are just a couple of the opportunities available at this conference and others throughout the year. Contact Kelly Calvanico, CLE Director, at 312.906.5091 or kcalvani@kentlaw.iit.edu for further information.
EVENT DETAILS

CONTINUING EDUCATION CREDIT

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HOTEL ACCOMMODATIONS

We have negotiated a special rate for our conference attendees at the following hotel:

The Holiday Inn Chicago Mart Plaza is a full service hotel located atop the Chicago Sun-Times building in the River North neighborhood of downtown. It is a 20 minute walk or a short cab ride to the law school. Rooms are available at the group rate of $229/night plus tax. Reservation may be made by contacting the hotel directly at 855-268-0372 or online at http://bit.ly/holidayinn17. When registering online enter the group code E33. To enjoy this special group rate, reservations must be made by May 8, 2017. Please be sure to mention you are attending the Conference on Not-For-Profit Organizations when making your reservations to receive our special group rate.

The Holiday Inn Chicago Mart Plaza
350 West Mart Center Drive
Chicago, IL 60654
Reservations: 855-268-0372
Group Code: E33

CANCELLATION POLICY

A full tuition refund will be granted if received by May 11, 2017. Tuition, less a 25% cancellation fee will be granted if received between May 12, 2017 and June 1, 2017. No refunds will be granted if received after June 1, 2017, but a substitution of attendees for this program will be permitted. Registrants not entitled to a refund will receive access to the written materials.

Email cancellation notices to cle@kentlaw.iit.edu.
36th Annual Conference on Not-For-Profit Organizations Pricing

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<th>Check applicable box:</th>
<th>Submitted on or before 5/25/17</th>
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*To qualify for the group pricing you need only register 3 or more individuals at the same time, does not apply with other discounted rates.

REGISTRATION FORM

Prefix                  Name(s) [please print]  Professional Title(s)
Firm/Company/Organization
Address
City, State, Postal Code
Telephone  Fax  Email
Please List Any Special Dietary Requirements or Accessibility Needs
CLE Credit?  □ Yes  □ No
Attorney Registration #
Registration Code (Enter characters appearing on the mailing label. Please enter this ID even if the label is addressed to someone else. Thank you!)

PAYMENT INFORMATION

AMOUNT: $_____________

□ Payment by check
(Make check payable to: Chicago-Kent College of Law)
□ Payment by credit card
  □ VISA  □ MasterCard  □ American Express  □ Discover

Name on Card
Card Number  Expiration Date  CSV Code

Signature
Billing Address, City, State, Postal Code

NOTE: Registration form must accompany payment information. If your organization is transferring funds electronically, please notify us as soon as possible.

EASY WAYS TO REGISTER

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