38th 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
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 not-for-profit organizational planning. Concentrated succinctly into a one-day conference, get hands-on practical knowledge, 7.0 hours of CLE credit, and 8.25 hours of CPE credit.

**CONFERENCE AT A GLANCE**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>8:00am</td>
<td>Registration</td>
</tr>
<tr>
<td>8:40am</td>
<td>Welcome</td>
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<tr>
<td>8:45am</td>
<td>Featured Plenary Address</td>
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<tr>
<td>9:00am</td>
<td>Exempt Organizations Update</td>
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<tr>
<td>9:30am</td>
<td>IL Attorney General’s Office Update</td>
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<tr>
<td>10:00am</td>
<td>Break</td>
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<td>10:15am</td>
<td>Mistakes Were Made</td>
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<tr>
<td>11:15am</td>
<td>Break</td>
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<tr>
<td>11:30am</td>
<td>Concurrent Sessions</td>
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<tr>
<td>12:30pm</td>
<td>Buffet Luncheon Pick-Up</td>
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<tr>
<td>12:45pm</td>
<td>Luncheon Sessions</td>
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**SESSIONS**

- **New Accounting Standards**
- **Employment Law: Policies and Procedures**
- **Private Foundations Survey: Fiscal Sponsors, Lobbying, and Political Campaign Activity**

**Additional Sessions**

- **UBIT - Tax Reform and Beyond**
- **Board Governance**
- **Data Privacy**

- **Fundraising Compliance: Navigating New Lands with Old Maps**
- **Recognizing and Preventing Harassment: #MeToo and #TimesUp at the Nonprofit Employer**
- **Brave New World: Navigating Taxes on Commuting and Compensation**

- **Top 10 Ethical Considerations for Accountants and Advisors Who Work with Accountants**
  - **Ethics Session**
- **Legal Ethics (Ethics Session)**

This conference is presented in partnership with Forefront and generous support from Wipfli.
CONFERENCE FACULTY

FEATURED SPEAKER

Margaret Von Lienen
Director, Exempt Organizations
Internal Revenue Service

Mary Andreoni
Ethics Education Counsel
Illinois Attorney Registration & Disciplinary Commission

Paula Cozzi Goedert
Partner
Barnes & Thornburg LLP

Tim Bresnahan
Senior Director of Gift Planning
The Chicago Community Trust

Barry S. Goldberg
Deputy Bureau Chief
Charitable Trust Bureau,
Office of the Illinois Attorney General

Emily B. Friedman
Senior Associate General Counsel
John D. and Catherine T. MacArthur Foundation

Bruce E. Huey
Retired Founding Partner
Friedman & Huey Associates, LLP

Molly S. DiRago
Attorney
Troutman Sanders

John Huskins
Principal
Johnson Lambert LLP

Rebekuh Eley
Senior Manager
RSM US LLP

Norah L. Jones
Partner/Co-Chair, Tax-Exempt Organizations Group
Quarles & Brady LLP

Janet Gibbs
President
Mission Accomplished

Jeff W. Kowieski
Risk Management Partner and General Counsel
Wipfli LLP
8:00am-8:40am  
Registration

8:40am-8:45am  
Welcome

8:45am-9:30am  
FEATURED PLENARY ADDRESS
Exempt Organizations Update  
This presentation will provide critical updates that occurred throughout the 2019 fiscal year and those expected in the near future.
Margaret Von Lienen, Director of Exempt Organizations, Internal Revenue Service

9:30am-10:00am  
Illinois Attorney General Update  
Come learn about important updates from the Illinois Attorney General’s office and hear about their plans for the future.
Office of the Illinois Attorney General

10:00am-10:15am  
Break

10:15am-11:15am  
Mistakes Were Made  
Financial and other mistakes are putting nonprofits in a bad place. Hear what mistakes others have made so you can step right around the problems.
Paula Cozzi Goedert, Partner, Barnes & Thornburg LLP

11:15am-11:30am  
Break

11:30am-12:30pm  
CONCURRENT SESSIONS
New Accounting Standards  
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 not-for-profit accounting and financial reporting.
Craig Wories, Partner, RSM US LLP

Employment Law: Policies and Procedures  
Formal policies and procedures set clear expectations for employee conduct and performance. They promote consistency in management decision making. They are an essential tool in articulating and disseminating your firm’s organizational culture and play a key role in implementing your organization’s strategic objectives. Come learn what policies and procedures are essential to your organization’s success.
William R. Pokorny, Partner, Franczek P.C.
Tejas Shah, Partner, Franczek P.C.

Private Foundations Survey: Fiscal Sponsors, Lobbying, and Political Campaign Activity  
This session will include a review of key rules and considerations applicable to private foundations and their grantees. The session will cover fiscal sponsorships. It also will review the prohibitions against funding lobbying and political campaign activity, as well as how to avoid violating those prohibitions in grant making.
Emily B. Friedman, Senior Associate General Counsel, John D. and Catherine T. MacArthur Foundation
Norah L. Jones, Partner/Co-Chair, Tax-Exempt Organizations Group, Quarles & Brady LLP

12:30pm-12:45pm  
Box Lunch Pick-Up

12:45pm-1:30pm  
LUNCHEON 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
Barry S. Goldberg, Deputy Bureau Chief, Charitable Trust Bureau, Office of the IL Attorney General
Kristin C. Louis, Senior Assistant Attorney General, Charitable Trust Bureau, Office of the IL Attorney General

Charitable Giving Provisions of the Tax Cuts and Jobs Act: Predictions We Made and the Current State of Charitable Giving  
In this session, we’ll review the charitable giving provisions of the Tax Cuts and Jobs Act of 2017 (the “TCJA”). Now that we’ve all gone through one tax season under the new regime, we’ll take a look at the predictions we made prior to the TCJA’s implementation and explore the current state of charitable giving.
Tim Bresnahan, Senior Director of Gift Planning, The Chicago Community Trust
Jorge Lopez, Associate General Counsel, John D. and Catherine T. MacArthur Foundation
So You Have Been Asked to be a Board Member of a Non-Profit
What questions should you be asking before accepting? What questions should you be ready to answer in your Board interview?

Bruce E. Huey, Retired Founding Partner, Friedman & Huey Associates LLP

1:30pm-1:45pm
Break

1:45pm-2:45pm
CONCURRENT SESSIONS

UBIT - Tax Reform and Beyond
The recent Tax Act significantly impacted unrelated business income taxes (UBIT) for tax-exempt organizations. Come learn how new calculation methods and other changes might impact your organization.

Rebekuh Eley, Senior Manager, RSM US LLP
David Lowenthal, Partner, Plante Moran PLLC

Board Governance
In this session, we will explore the issues relating to Board Governance that make the difference between a mediocre Board and a high functioning Board. Group participation is encouraged!

Janet Gibbs, President, Mission Accomplished

Data Privacy
Molly will give an overview of data privacy and how it impacts nonprofit organizations. At the local level, we’ll look at Illinois’ new Biometric Privacy Act (BIPA) and the City of Chicago’s new Personal Data Collection and Protection Ordinance and talk about how these new laws impact nonprofits.

Molly S. DiRago, Attorney, Troutman Sanders

2:45pm-3:00pm
Break

3:00pm-4:00pm
CONCURRENT SESSIONS

Fundraising Compliance- Navigating New Lands with Old Maps
This session will provide an overview of the laws and legal principles governing fundraising and apply them to current developments in charitable giving.

Ryan K. Oberly, Partner, Wagenmaker & Oberly LLC

Recognizing and Preventing Harassment: #MeToo and #TimesUp at the Nonprofit Employer
Session participants will receive a baseline overview of the legal standards applicable to sexual harassment, as well as the workplace situations that could create enterprise risk. We will update the group on relevant legislative trends and how government agencies approach sexual harassment complaints. We will also host a discussion on best practices for investigating and responding to internal harassment complaints.

Jeffrey S. Piell, Partner, Quarles & Brady LLP
William A. Walden, Attorney, Quarles & Brady LLP

Brave New World: Navigating Taxes on Commuting and Compensation
This session will discuss the new taxes on certain commuting and compensation payments. Upon completion of the session attendees will understand the reporting requirements of these taxes, the calculations necessary to arrive at taxes due, and be able to identify these items within their own organizations.

John Huskins, Principal, Johnson Lambert LLP

4:00pm-4:15pm
Break

4:15pm-5:15pm
CONCURRENT SESSIONS

Top 10 Ethical Considerations for Accountants and Advisors Who Work with Accountants
This session will review a variety of common ethical concerns and situations accountants may face, and also consider some valuable related risk management considerations. Topics may include independence, conflicts of interest, privilege, elements of a good engagement letter, systems of quality control, unauthorized practice of law, and working with regulators.

Jeff W. Kowieski, Risk Management Partner and General Counsel, Wipfli LLP

Legal Ethics
• An overview of lawyer regulation in Illinois and the investigation and disciplinary process.
• The top legal ethics trends for 2019 and beyond.
• The ethical challenges for lawyers dealing with accounting issues including handling client funds.

Mary Andreoni, Ethics Education Counsel, Illinois Attorney Registration & Disciplinary Commission
### UPCOMING CLE CONFERENCES

<table>
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<tr>
<th>Date</th>
<th>Conference</th>
<th>MCLE Credit</th>
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<tbody>
<tr>
<td>May 16, 2019</td>
<td>38th Annual Federal Tax Institute</td>
<td>Eligible for 7.5 hours of IL MCLE credit</td>
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<td>June 4, 2019</td>
<td>Institute for Law in the Workplace Employment Law Conference</td>
<td>IL MCLE credit to be determined</td>
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<tr>
<td>August 15, 2019</td>
<td>Legal Innovations Conference</td>
<td>IL MCLE credit to be determined</td>
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<tr>
<td>September 19, 2019</td>
<td>37th Annual Federal Sector Labor Relations &amp; Labor Law Conference</td>
<td>IL MCLE credit to be determined</td>
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<tr>
<td>October 17, 2019</td>
<td>11th Annual Conference on Futures &amp; Derivatives</td>
<td>IL MCLE credit to be determined</td>
</tr>
<tr>
<td>October 29, 2019</td>
<td>The Morris Lecture in International and Comparative Law (free!)</td>
<td>Eligible for 1.0 hour IL MCLE credit</td>
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<tr>
<td>November 15, 2019</td>
<td>35th 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

“Speakers have good energy and always address practical topics that can really benefit an organization.”

– Previous Attendee
LL.M. PROGRAM IN TAXATION

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

<table>
<thead>
<tr>
<th></th>
<th>IL MCLE Credit</th>
<th>PA MCLE Credit</th>
<th>IL Accounting CPE Credit</th>
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<tbody>
<tr>
<td>Credits/Hours</td>
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<td>7.0 hrs</td>
<td>8.25 hrs</td>
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<tr>
<td>Ethics Credits</td>
<td>1.0 hr ethics, pending approval</td>
<td>1.0 hr ethics, pending approval</td>
<td>1.0 hrs ethics, pending approval</td>
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CONFERENCE LOCATION

CHICAGO-KENT COLLEGE OF LAW

565 W. Adams Street
Chicago, IL 60661
cle@kentlaw.iit.edu
(312)906-5090
https://cle.kentlaw.edu

CANCELLATION POLICY

A full tuition refund will be granted if received in writing by May 24, 2019. Tuition, less a 25% cancellation fee will be granted if received between May 25, 2019 and June 7, 2019. No refunds will be granted if received after June 7, 2019, 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.
38th Annual Conference on Not-For-Profit Organizations Pricing

Check applicable box: Submitted on or before 5/31/19 Downloadable Materials Only Submitted on or before 5/31/19 Hard Copy Book & Download Materials Submitted after 5/31/19 Downloadable Materials Only Submitted after 5/31/19 Hard Copy Book & Download Materials

- Regular
  - Submitted on or before 5/31/19
    - Downloadable Materials Only: $245
    - Hard Copy Book & Download Materials: $270
  - Submitted after 5/31/19
    - Downloadable Materials Only: $275
    - Hard Copy Book & Download Materials: $300
- Group*
  - Submitted on or before 5/31/19
    - Downloadable Materials Only: $235
    - Hard Copy Book & Download Materials: $260
  - Submitted after 5/31/19
    - Downloadable Materials Only: $265
    - Hard Copy Book & Download Materials: $290
- Chicago-Kent Alumni
  - Submitted on or before 5/31/19
    - Downloadable Materials Only: $220
    - Hard Copy Book & Download Materials: $245
  - Submitted after 5/31/19
    - Downloadable Materials Only: $220
    - Hard Copy Book & Download Materials: $245

*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

Special Dietary Requirements or Accessibility Needs?

Do You Plan to Attend Lunch? ☐ Yes ☐ No

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 TYPE:

☐ 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.

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Chicago, IL 60661-3691
38th Annual
CONFERENCE ON NOT-FOR-PROFIT ORGANIZATIONS
Thursday, June 13, 2019

Earn up to 7.0 hrs IL MCLE credit
& 8.25 hrs IL CPE credit